



BUILDING OWNER/FACILITY MANAGER NATIONAL BRAND AWARENESS, USAGE, & PREFERENCE STUDY

Results Of A Study Conducted By
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METHODOLOGY

This report details brand awareness, usage, and preference of suppliers in twenty-one separate product categories among subscribers of *Building Operating Management* magazine (building owners and facility executives) of commercial & institutional buildings including commercial office, educational, health care, government, industrial, retail and hospitality.

SAMPLE

The survey audience was drawn from 20,000 subscribers to *Building Operating Management* magazine (building owners, facility executives). Survey recipients consisted of a cross-section of 73,000 building owner/facility executive subscribers.

SURVEY

This survey was sent via e-mail to 20,000 participants on March 30, 2016. Follow-up surveys were emailed to non-respondents on April 4, & April 8, 2016. A total of 15 chose to opt-out or failed to respond due to an invalid e-mail address.

RESPONSE

The survey was closed on April 14, 2016 with 465 qualified questionnaires returned by the deadline, and a net mailing of 19,985 the rate of response for the email was computed to be 2.3%.

STATISTICAL CONFIDENCE

The overall estimated margin of error for this study is ± 4.53 percent at the 95 percent confidence level.

SURVEY DEFINITIONS

Brand Awareness- The extent to which a brand associated with a particular product is documented by potential and existing customers.

Brand Usage- The brands that facility executives are currently using or have used in the past.

Brand Preference- The extent to which facility executives make purchasing decisions based on a brand name.

Brand Awareness, Usage, & Preference By Category

Access Control/Security Systems

Brands	Brand Awareness*	Brand Usage*	Brand Preference
ADT	82%	19%	13%
Johnson Controls	81%	17%	12%
Honeywell	80%	15%	12%
Siemens	71%	16%	9%
SimplexGrinnell	69%	18%	10%
Tyco	56%	13%	5%
Yale	43%	10%	2%
Bosch	42%	7%	2%
Sargent	42%	13%	2%
Panasonic	36%	6%	0%
ASSA ABLOY	34%	15%	6%
Corbin Russwin	33%	14%	4%
HID	31%	15%	10%
Allegion	20%	5%	1%
Kaba Access	13%	4%	0%
Vicon	11%	3%	0%
Onity	7%	3%	0%
Other**	14%	0%	12%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Acoustic/Sound Masking

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Armstrong Commercial Ceilings	94%	59%	84%
Cambridge Sound Management	24%	4%	8%
Tectum	19%	6%	4%
Logison	13%	1%	1%
Lencore	13%	3%	2%
Other**	1%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Building Automation

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Johnson Controls.....	86%	28%	23%
Honeywell.....	85%	18%	13%
Trane	78%	29%	16%
Siemens	75%	19%	12%
Carrier	59%	16%	4%
Schneider Electric	39%	11%	7%
Automated Logic	32%	9%	4%
Delta Controls	27%	4%	2%
Tridium.....	25%	9%	7%
Alerton	20%	7%	5%
Reliable Controls	14%	3%	2%
KMC Controls.....	13%	3%	1%
AmericanAuto-Matrix.....	9%	2%	1%
Trend	5%	1%	0%
Other**	3%	0%	3%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Ceilings

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Armstrong Commercial Ceilings	95%	64%	76%
USG.....	56%	20%	9%
CertainTeed	46%	10%	6%
Hunter Douglas	43%	5%	7%
Tectum.....	16%	4%	1%
Parkland Plastics	7%	1%	0%

(* Total exceeds 100% because multiple mentions were allowed.)

Data Center Management

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Siemens	80%	14%	23%
Liebert	55%	28%	33%
GE Energy	49%	3%	10%
Schneider Electric	48%	12%	9%
Caterpillar	41%	8%	5%
Eaton	38%	10%	4%
ASCO	37%	13%	12%
Russelectric	13%	3%	2%
MEPPI	12%	1%	1%
Upsite Technologies	6%	1%	0%
Other**	1%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Door Hardware

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Stanley	85%	25%	15%
Kwikset	80%	24%	13%
Yale	73%	24%	14%
Sargent	62%	25%	15%
Corbin Russwin	50%	21%	16%
ASSA ABLOY	38%	20%	11%
Norton	32%	7%	1%
Detex	20%	8%	2%
Allegion	19%	5%	4%
Hager	16%	3%	1%
Alarm Lock	14%	2%	3%
Construction Specialties Acrovyn	8%	2%	0%
Select Products	4%	1%	0%
Other**	6%	0%	5%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Elevators

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Otis.....	89%	40%	42%
Thyssen Krupp.....	76%	35%	29%
Schindler	68%	22%	15%
Dover.....	63%	18%	6%
Kone	53%	13%	6%
Fujitec	19%	3%	1%
Magnetek.....	13%	1%	1%
Other**	1%	0%	0%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Fire/Life Safety

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Honeywell	85%	17%	10%
ADT	82%	15%	10%
SimplexGrinnell	80%	30%	27%
Johnson Controls.....	75%	9%	7%
Siemens	66%	17%	13%
Tyco.....	64%	12%	4%
Kidde Fenwal	36%	7%	2%
Notifier	31%	17%	13%
Silent Knight	28%	10%	6%
Fire-Lite	23%	8%	3%
Fenwal Protection Systems	18%	2%	1%
Gamewell/FCI.....	17%	4%	2%
Fike	12%	1%	1%
Potter.....	10%	2%	0%
AGF.....	9%	1%	0%
UTC.....	9%	1%	0%
Cooper Notification.....	8%	2%	0%
Lubrizol/Blazemaster	6%	1%	0%
System Sensor.....	5%	2%	0%
Armstrong Fluid.....	4%	1%	0%
Other**	3%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Flooring

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Armstrong	95%	53%	37%
Mohawk	73%	33%	8%
Shaw.....	63%	32%	16%
Mannington.....	48%	20%	5%
Johnsonite	43%	17%	1%
Bigelow	42%	17%	3%
Milliken.....	38%	17%	7%
Tarkett	35%	13%	3%
Bentley Mills.....	21%	8%	2%
Roppe	21%	11%	1%
Empire Today	20%	1%	1%
Tandus	20%	10%	6%
J+J	17%	6%	0%
Patcraft	17%	9%	1%
Amtico.....	16%	4%	1%
Forbo	15%	9%	1%
Flexco.....	14%	3%	0%
Musson Rubber	12%	4%	1%
Nora.....	11%	4%	0%
Stonhard	11%	4%	1%
Beauleau.....	10%	2%	1%
Tate Access Floor	8%	1%	0%
Bolyu.....	7%	3%	1%
FreeAxez	4%	1%	0%
Other**	1%	0%	3%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

HVAC

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Trane	90%	48%	37%
Carrier	87%	41%	20%
Johnson Controls/York.....	81%	30%	13%
Honeywell	76%	19%	3%
Lennox	70%	18%	3%
Mitsubishi	65%	20%	4%
Siemens.....	63%	10%	3%
Rheem	61%	10%	3%
Fujitsu	45%	11%	1%
LG	44%	3%	1%
Armstrong Pumps	34%	13%	1%
Daikin.....	32%	13%	1%
Reznor	26%	10%	0%
ABB	23%	9%	1%
Bradford White	23%	5%	0%
Rinnai.....	21%	4%	1%
Modine	18%	5%	0%
Titus	17%	3%	1%
Carlisle HVAC	16%	2%	0%
Goodway	16%	6%	0%
Yaskawa	16%	4%	1%
Semco.....	13%	1%	1%
Aerco.....	10%	2%	0%
United Cool Air.....	9%	2%	1%
Fulton	8%	3%	0%
Other**	2%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Lighting

Brands	Brand Awareness*	Brand Usage*	Brand Preference
GE Lighting	92%	64%	29%
Philips	92%	61%	28%
Osram Sylvania	55%	34%	13%
Siemens	53%	18%	2%
Panasonic	52%	16%	1%
Hubbell Lighting	49%	23%	2%
CREE	44%	22%	11%
Eaton/Cooper	40%	17%	2%
Universal	26%	10%	2%
RAB Lighting	22%	12%	3%
Acuity	19%	7%	2%
TCP	17%	8%	1%
Columbia	16%	6%	1%
Alera	10%	1%	0%
EarthTronics	7%	2%	0%
EYE Lighting	5%	1%	0%
Other**	3%	0%	3%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Lighting Controls

Brands	Brand Awareness*	Brand Usage*	Brand Preference
GE	72%	35%	14%
Johnson Controls.....	70%	27%	11%
Philips	65%	23%	10%
Leviton	63%	34%	17%
Siemens	59%	20%	6%
Lutron.....	55%	32%	14%
Schneider Electric/Square D	48%	25%	9%
Panasonic	44%	8%	0%
Hubbell.....	38%	16%	4%
Osram Sylvania	36%	11%	3%
Watt Stopper.....	29%	16%	4%
Cooper.....	25%	9%	2%
Sensor Switch.....	21%	7%	2%
Acuity.....	16%	4%	0%
Juno Lighting	13%	1%	0%
Daintree.....	5%	0%	0%
Other**	3%	0%	4%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Metal Roofs/Walls

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Butler.....	53%	17%	29%
Steelscape.....	38%	10%	20%
CECO Building Systems.....	27%	7%	9%
Star Building	22%	5%	7%
Petersen Aluminum Corp (PAC-CLAD).....	20%	6%	6%
ATAS.....	14%	3%	8%
Metl-Span.....	13%	3%	3%
VP Buildings.....	13%	3%	5%
Centria.....	11%	2%	2%
King Span.....	11%	1%	2%
Fabral	10%	1%	6%
MBCI	8%	3%	0%
Englert.....	6%	1%	1%
Other**	1%	0%	2%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Paints & Coatings

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Sherwin Williams.....	97%	73%	47%
Benjamin Moore	87%	44%	16%
Glidden.....	86%	30%	6%
Behr.....	85%	34%	13%
Rust-Oleum	78%	40%	1%
Krylon	57%	20%	0%
Kilz.....	43%	27%	2%
PPG	41%	14%	4%
Pratt & Lambert	35%	8%	2%
Kelly Moore	32%	5%	2%
Bayer.....	24%	2%	1%
Dulux.....	24%	4%	0%
ICI	17%	4%	0%
InPro.....	1%	1%	0%
Other**	7%	0%	6%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Plumbing

Brands	Brand Awareness*	Brand Usage*	Brand Preference
American Standard.....	95%	70%	17%
Kohler.....	94%	60%	26%
Delta Faucet	93%	55%	7%
Moen	84%	42%	14%
Sloan Valve.....	75%	56%	18%
Zurn.....	55%	34%	4%
Chicago Faucet.....	52%	30%	6%
TOTO	38%	18%	4%
Bradley Corp.....	33%	13%	1%
Armstrong Pumps	32%	15%	1%
T&S Brass.....	24%	14%	1%
FlowGuard	19%	4%	0%
Caroma.....	6%	0%	0%
Other**	2%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Restroom Products

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Kimberly Clark	81%	41%	19%
Georgia Pacific	78%	39%	27%
Dyson	64%	16%	12%
American Dryer	53%	16%	7%
Bobrick.....	51%	29%	16%
Excel Dryer	47%	16%	6%
World Dryer	36%	11%	4%
American Specialties/The ASI Group.....	30%	8%	3%
Wausau	20%	3%	0%
San Jamar	19%	4%	0%
SCA/Tork	18%	7%	2%
Mitsubishi Jet Towel	15%	2%	1%
Scranton Products	9%	3%	2%
Other**	1%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Roofing

Brands	Brand Awareness*	Brand Usage*	Brand Preference
BASF.....	63%	19%	8%
Firestone.....	60%	26%	15%
GAF.....	55%	19%	11%
Johns Manville	53%	22%	10%
CertainTeed	50%	17%	10%
Duro-Last	43%	10%	5%
Carlisle	41%	25%	11%
Tremco	37%	14%	8%
Honeywell	31%	7%	3%
Butler.....	30%	6%	1%
Garland.....	24%	6%	3%
Flex Roofing.....	19%	3%	1%
Sika Sarnafil	15%	10%	5%
Tamko.....	15%	4%	1%
ATAS	13%	3%	1%
Henry Company	10%	3%	1%
Polyglass	10%	1%	1%
Versico.....	10%	3%	0%
Neogard.....	8%	0%	1%
Progressive Materials Inc	8%	1%	0%
Metl Span	7%	2%	0%
MuleHide	6%	2%	1%
Seaman-FiberTite.....	5%	1%	1%
Roxul.....	4%	0%	0%
MBCI	3%	1%	0%
Other**	1%	0%	2%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Roof Coatings

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Dow	69%	20%	29%
GAF	59%	23%	26%
Tremco	51%	19%	20%
Garland	31%	10%	8%
Kemper	16%	5%	5%
Uniflex/KST	15%	3%	2%
Palmer Asphalt	11%	3%	2%
Karnak	10%	2%	2%
ICC Astec	8%	1%	2%
Other**	3%	0%	4%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Thermal Imager

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Fluke	82%	41%	57%
Milwaukee Tool	57%	9%	16%
FLIR	45%	17%	20%
Testo	10%	3%	2%
Palmer Wahl	9%	2%	3%
Predictive Service Corp	5%	1%	1%
Other**	0%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Windows

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Andersen	91%	39%	38%
Pella.....	80%	22%	14%
Jeld-Wen.....	59%	15%	10%
Marvin.....	54%	13%	11%
Allied Window	29%	4%	3%
Kawneer	25%	12%	9%
Traco	20%	7%	5%
EFCO	12%	3%	1%
MechoShade.....	12%	6%	5%
YKK.....	6%	1%	1%
Other**	3%	0%	3%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Wire & Cable Solutions

Brands	Brand Awareness*	Brand Usage*	Brand Preference
Wiremold/Legrand	69%	44%	48%
Panduit	44%	27%	19%
Universal Electric.....	43%	18%	20%
Connectrac	26%	10%	7%
Anixter	16%	5%	4%
FreeAxez	3%	1%	1%
Other**	0%	0%	1%

(* Total exceeds 100% because multiple mentions were allowed.)

(** See Appendix)

Appendix

Access Control/Security Systems- Awareness

Other responses

AFP Fire protection	Kastle (2)
AMAG	Keri
Best	Keyscan
Bluewave	Lenel (3)
Comcast	Open Options
Datawatch (2)	Pelco
DMP (2)	RS2
Door King	Salient
DSX Access Systems (DSXinc) (2)	Schneider Electric
eMerge	Stanley Security (3)
Frontier	Vector
Genetex	WIN
Guardian-Alaska	

Access Control/Security Systems- Preference

Other responses

AFP	Keyscan
Best	Lenel
Bluewave	Open Options
Datawatch (2)	Pelco
DMP	Per Mar
Door King	RS2
DSX Access Systems (2)	Salient
Frontier	Stanley Security (3)
GE	Vector
Genetex	WIN
Keri	

Acoustics/Sound Masking – Awareness

Other responses

Radar
USG

Acoustics/Sound Masking – Preference

Other responses

My interior designer or architect specs out the ceiling for my facilities.

Not sure but they often have “tegular edge”

USG

Building Automation- Awareness

Other responses

Andover	EcoBee
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Capron	Prism II
--------	----------

DAC-Digital Access Control

Building Automation- Preference

Other responses

Andover	EcoBee
---------	--------

Crestron

Honeyewell was terrible...the only thing that their reps cared about was sales.

I replaced them 2 years after I came onto the job of managing 250 thousand square feet of office clinic and office space.

We use what our vendor supplies

Ceilings-Awareness

Other responses

My architect or interior consultant picks window treatments, also ceilings acoustical, and I make the final decision on tile and carpet.

Data Center Management-Awareness

Other responses

Great Plains

Data Center Management-Preference

Other responses

Great Plains	Schlage
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Door Hardware- Awareness

Other responses

Best	Oak
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Falcon	Schlage (7)
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Folger Adam

Door Hardware- Preference**Other responses**

Best	Oak
Folger Adam	Schlage (6)

Elevators- Awareness**Other responses**

PS Mercado

Fire/Life Safety- Awareness**Other responses**

Bass United	Hitachi
Edwards EST use, DMT use	National Time
GE	

Fire/Life Safety- Preference**Other responses**

EPS	National Time
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Flooring- Awareness**Other responses**

Interface (2)

Flooring- Preference**Other responses**

Avenue Rugs	Interface (3)
I had problems with Armstrong tiles curling	

HVAC- Awareness**Other responses**

AAON (2)	Mammoth
Goodman	

HVAC- Preference**Other responses**

AAON
Mammoth

Lighting- Awareness

Other responses

Advance	Flightlight
All	Lithonia (2)
Bratic	Manairco
Earth Smart	Spectrum
EcoSmart	

Lighting- Preference

Other responses

All	It depends on the application
Any brand made in USA!	Manairco
Bratic	The cheapest
Earth Smart	

Lighting Controls- Awareness

Other responses

All	Honeywell
Any brand made in USA!	LC&D
Blue Ridge Technologies	

Lighting Controls- Preference

Other responses

All	Honeywell
Any brand made in USA!	Most user friendly
Blue Ridge Technologies	Prefer best value to life cycles
Bratic	Willing to try a new style
Greengate	

Metal Roof/Walls-Awareness

Other responses

Brand and materials manufactured in USA
Cleary

Metal Roof/Walls-Preference

Other responses

Brands and materials manufactured in USA	Prefer the company that meets my needs
Cleary	

Paints & Coatings- Awareness

Other responses

All	Hallman Lindsay
Anyone in local market	Kwali
Dunne Edwards (4)	Miller (2)
Dutch Boy	Valspar (2)
Ferrell Calhoun	Wasser

Paints & Coatings- Preference

Other responses

All	Dunn Edwards (5)
Any brand produced in USA	Hallman Lindsay
Anyone in local market	Miller
Depends on application	Valspar

Plumbing-Awareness

Other responses	Bell & Gossett
All	WaterSaver (2)

Plumbing-Preference

Other responses

All	Whichever one fits my needs for
WaterSaver	the application at hand.

Restroom Products- Awareness

Other responses

American Hotel Register

Restroom Products- Preference

Other responses

A brand made in USA!	American Hotel Register
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Roofing- Awareness

Other responses

Derbigum
EcoStart

Roofing- Preference**Other responses**

Derbigum

That brand manufactured in USA!

EcoStart

Roofing Coatings- Awareness**Other responses**

GACO

Polyglass

Henry

Siplast

Local brand

Roofing Coatings- Preference**Other responses**

Any coating manufactured in USA!

Local brand

GACO

Polyglass

Henry

Siplast

Thermal Imager – Preference**Other responses**

Prefer it made in USA

Windows- Awareness**Other responses**

Every manufacturer in the world

Made in America

Fibertec

Skyline

Gerkin

Windows- Preference**Other responses**

Any brand made in USA!

Depends on the application

Brands seem to have different applications,
all are not really comparable

Gerkin

Skyline

Wire & Cable Solution- Preference**Other responses**

Made in America is absolutely required!

SURVEY QUESTIONNAIRE (SAMPLE QUESTIONS)

OF THE CEILING BRANDS LISTED BELOW, PLEASE CHECK WHICH BRANDS YOU ARE AWARE OF, AND WHICH BRANDS YOU USE.

Brands You Are Aware of Brands You Use

Armstrong Commercial Ceilings
CertainTeed
Hunter Douglas
Parkland Plastics
Tectum
USG
Other (Please Specify)

OF THE CEILING BRANDS LISTED BELOW, PLEASE CHECK THE ONE BRAND WHICH YOU PREFER THE MOST.

Armstrong Commercial Ceilings
CertainTeed
Hunter Douglas
Parkland Plastics
Tectum
USG
Other (Please Specify)

