



Housing Market Index (HMI)

Special Questions on Who has the Greatest
Influence On Selection of Products For A Typical
Construction Project

February 2020



Economics & Housing Policy Group

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Introduction:

For more than 25 years, the National Association of Home Builders (NAHB) has conducted a monthly survey of its builder members that is used to generate the NAHB/Wells Fargo Housing Market Index (HMI). The main section of the HMI survey asks builders to rate market conditions for the sale of new homes at the present time and expected over the next 6 months, as well as the traffic of prospective buyers. The results are combined into a single composite index that measures the overall strength of the market for new single-family housing.

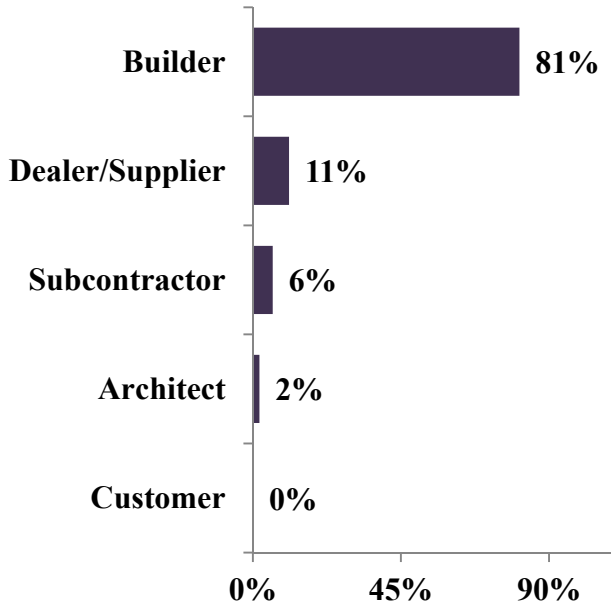
Throughout its history, the HMI has generally performed well as a leading indicator of single-family housing starts and is widely reported in business media and used by government and Wall Street analysts. This month survey was sent electronically to a panel of roughly 2,750 builder members. Results are broken down by the four census regions and by total number of units started in 2019. The survey sample is refreshed annually to keep the panel consistent overtime.

In addition to the questions that provide the data needed to compute the HMI, the survey often also includes a set of “special” questions on a topic of current interest to the housing industry. The special questions cover issues relating to who has the greatest influence on product selection for a typical construction project. The results in this report are based on 352 responses to these special questions.

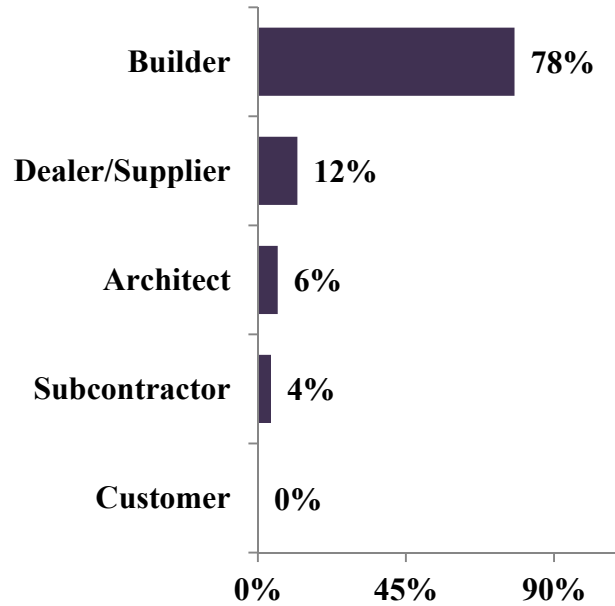
Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents)

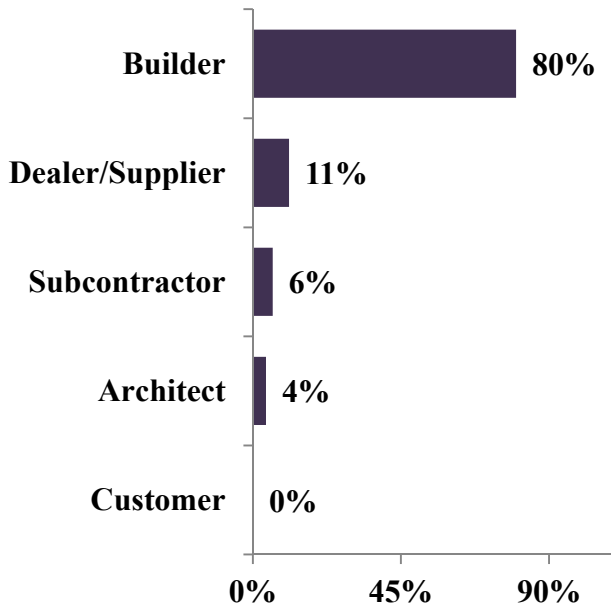
SAWN (DIMENSION) LUMBER



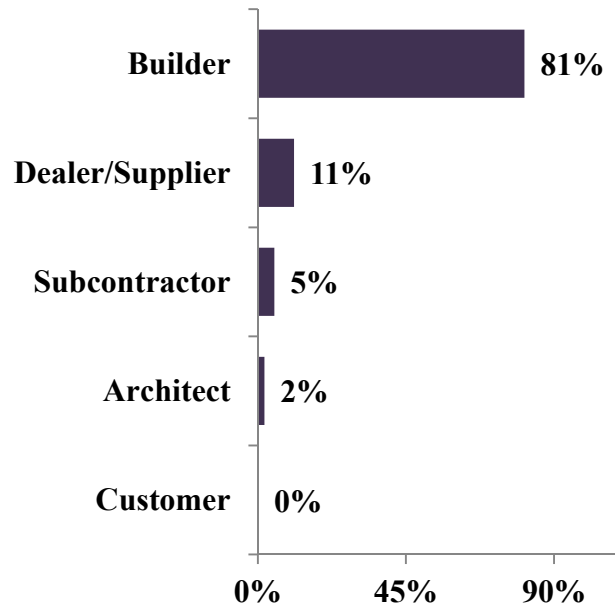
ENGINEERED LUMBER & I-JOISTS



TRUSSES

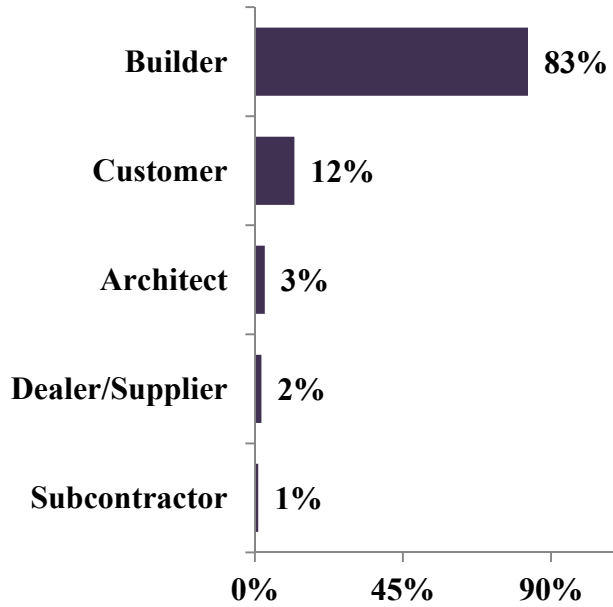


PLYWOOD & OSB

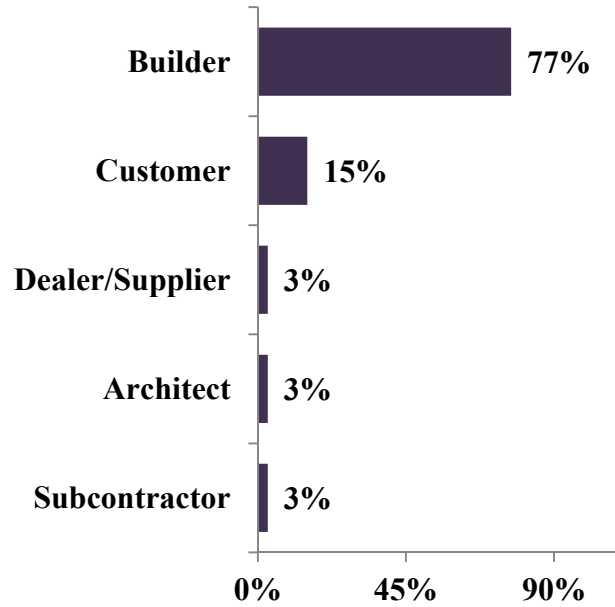


Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) - *continued*

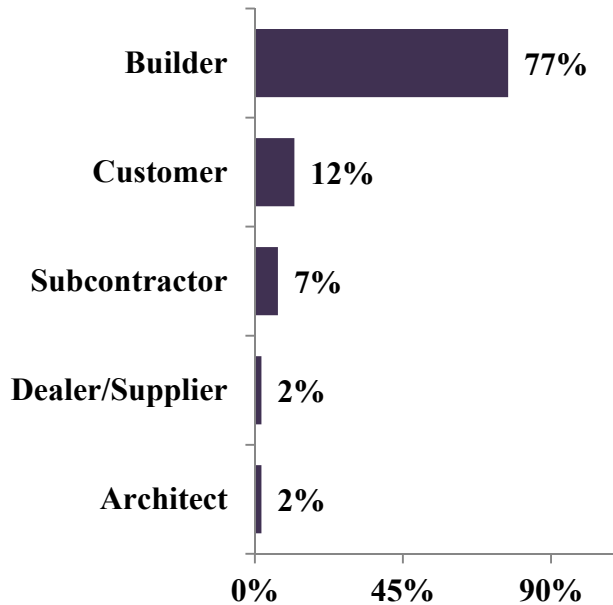
WINDOWS & DOORS



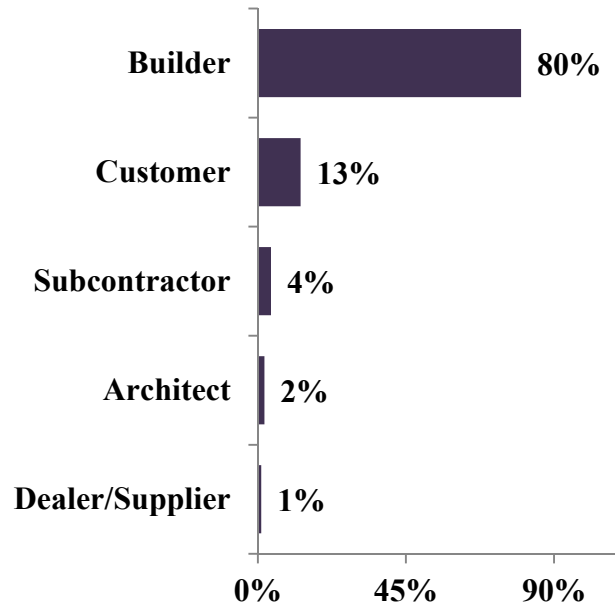
TRIM & OTHER MILLWORK



ROOFING

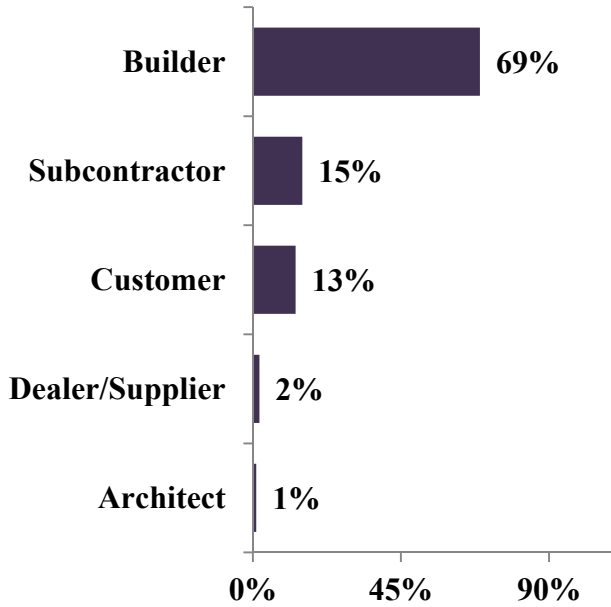


SIDING

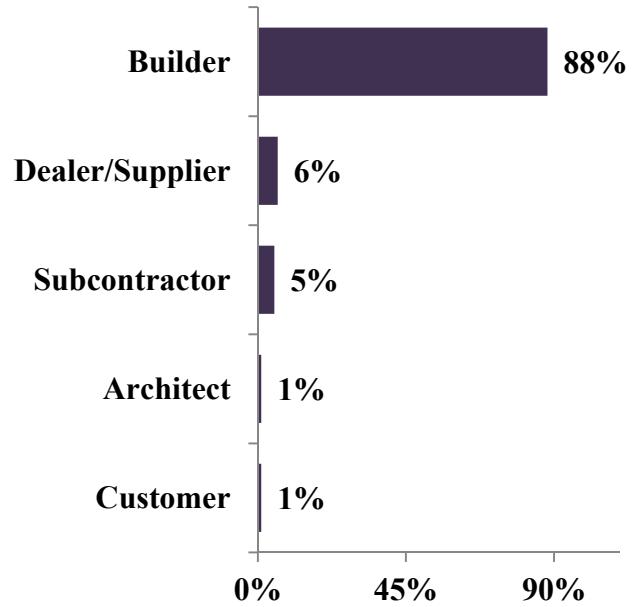


Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) - *continued*

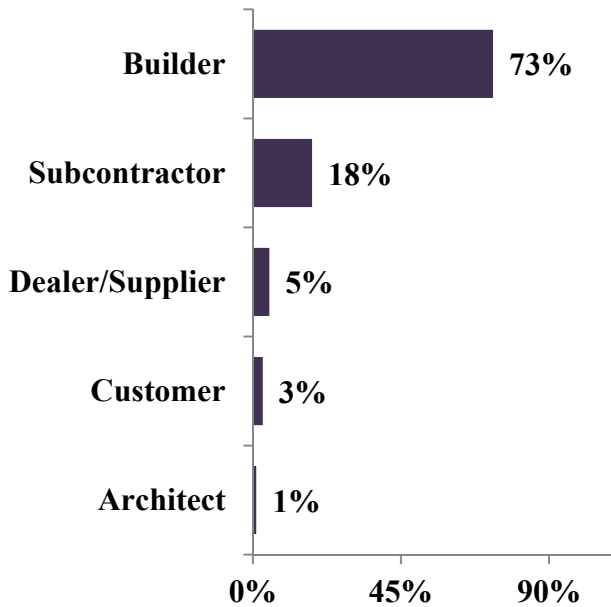
MASONRY & MASONRY SUPPLIES



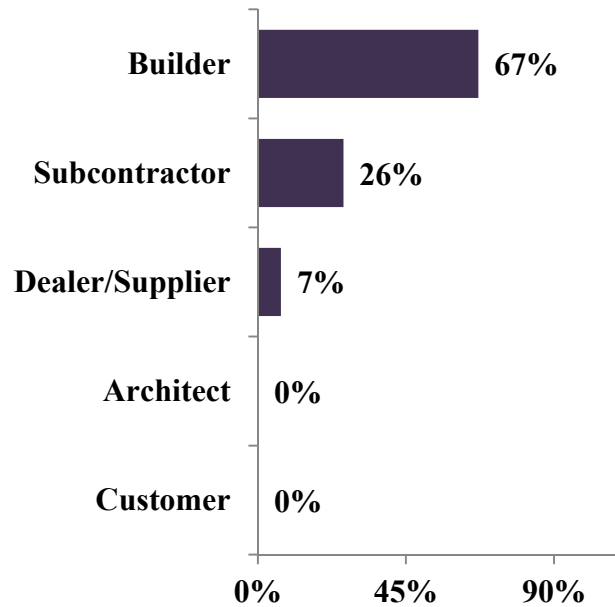
HOUSE WRAP



INSULATION

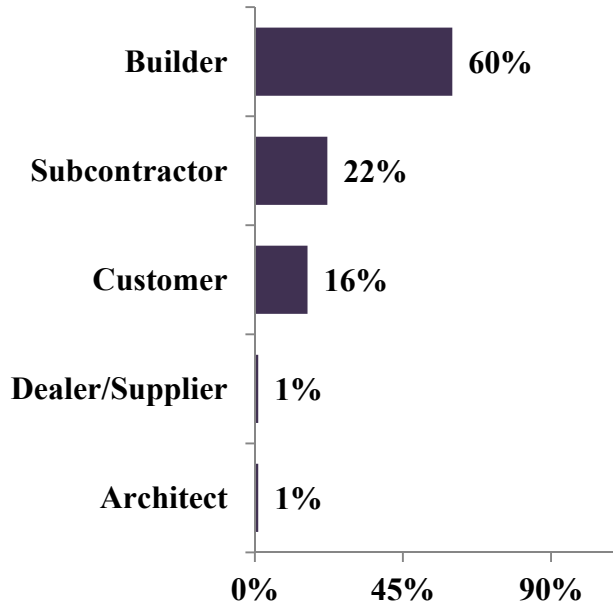


GYPSUM WALLBOARD

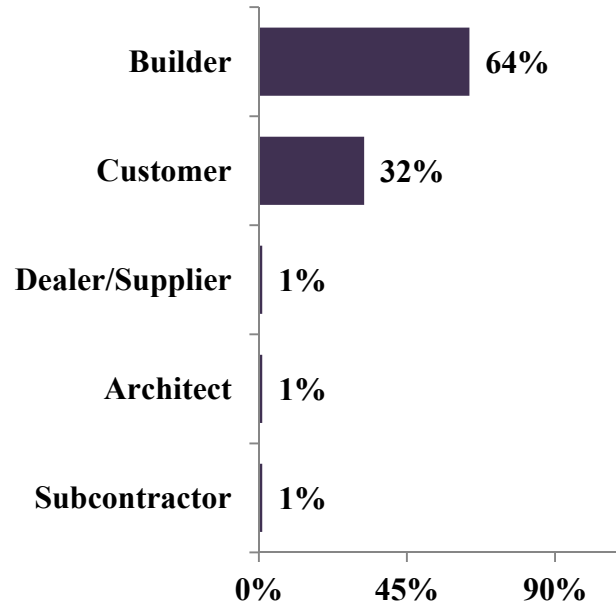


Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) - *continued*

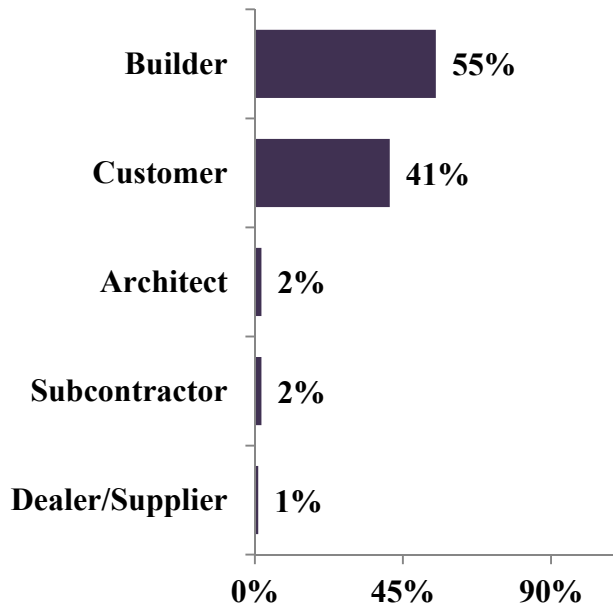
PAINT



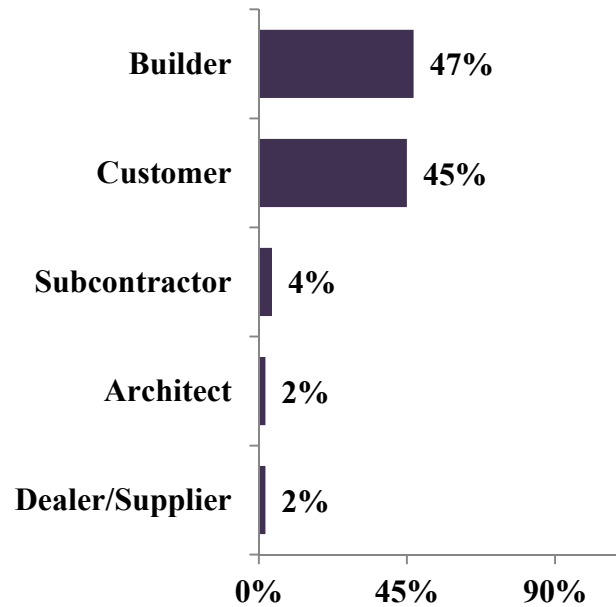
CABINETS



COUNTERTOPS

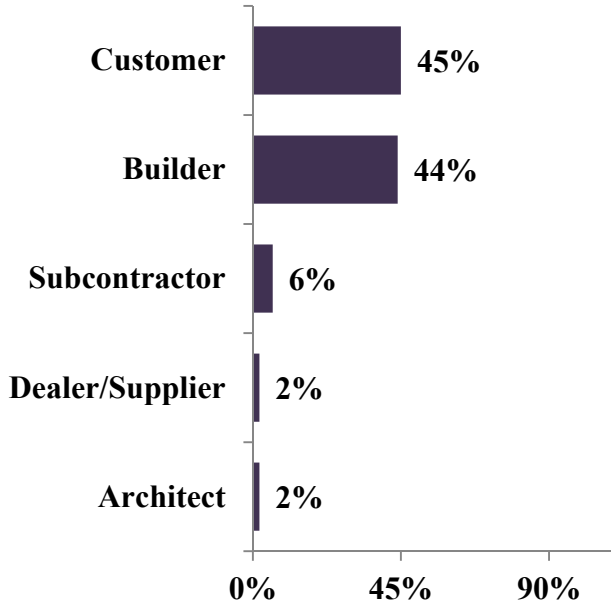


CERAMIC TILE

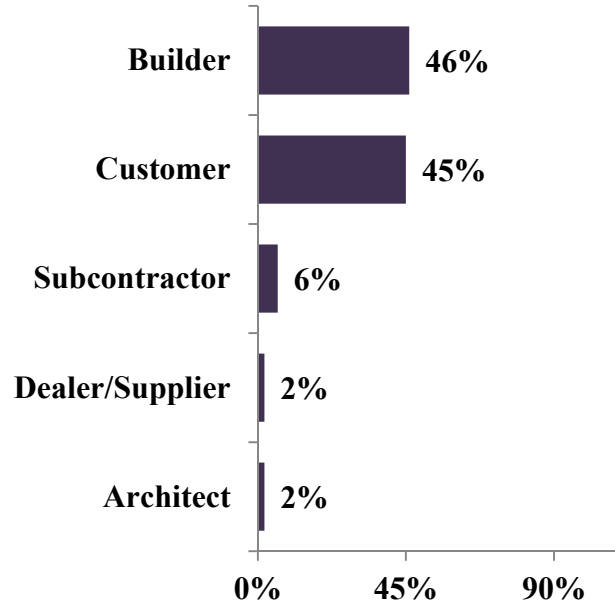


Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) - *continued*

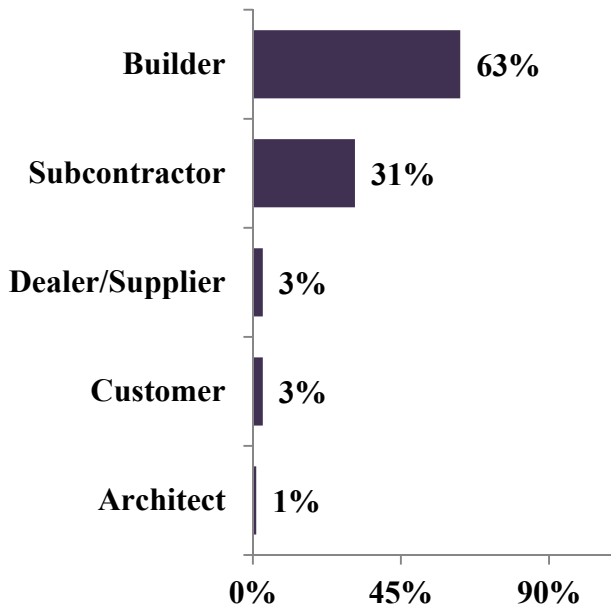
CARPETING



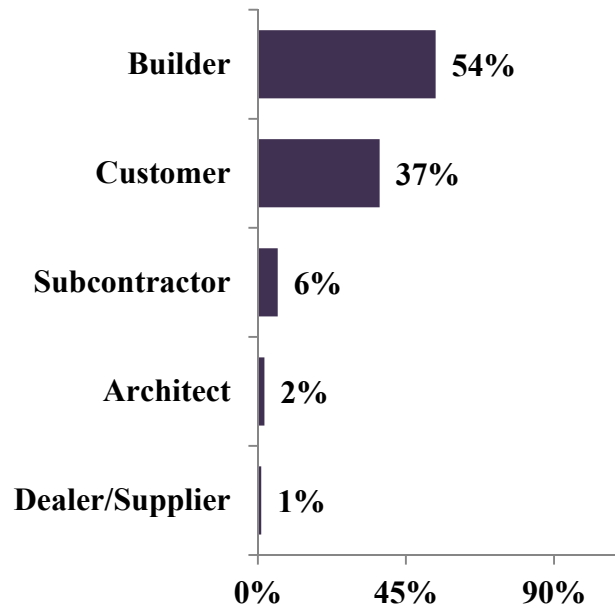
OTHER FLOORING



HAVAC EQUIPMENT & DUCTS

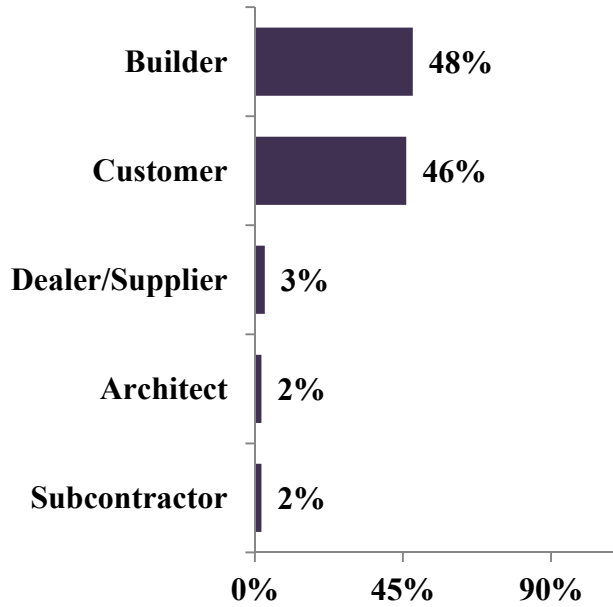


PLUMBING FIXTURES

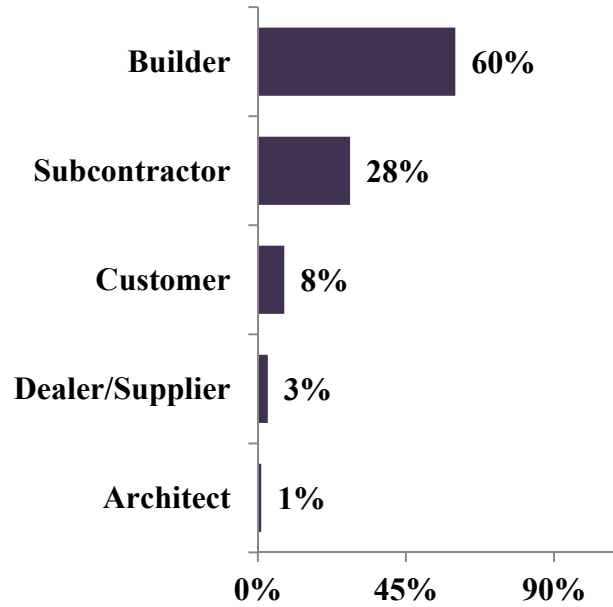


Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) - *continued*

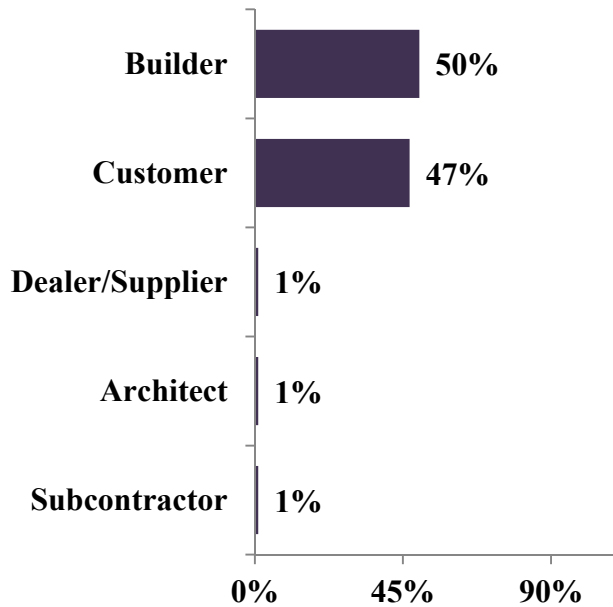
LIGHTING



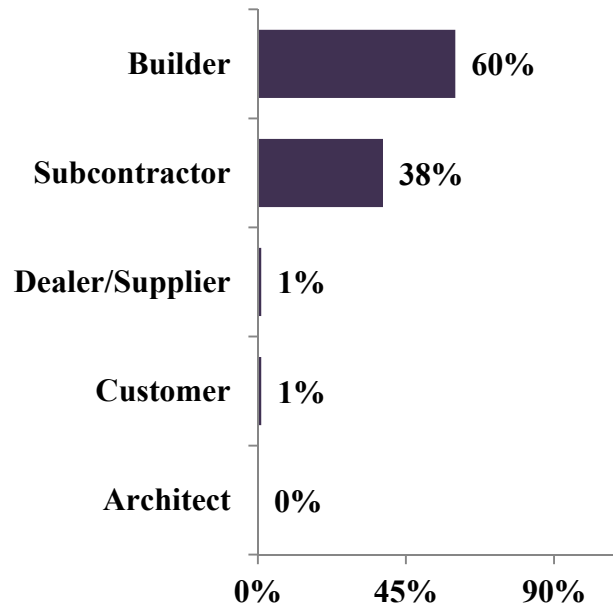
ELECTRICAL



APPLIANCES

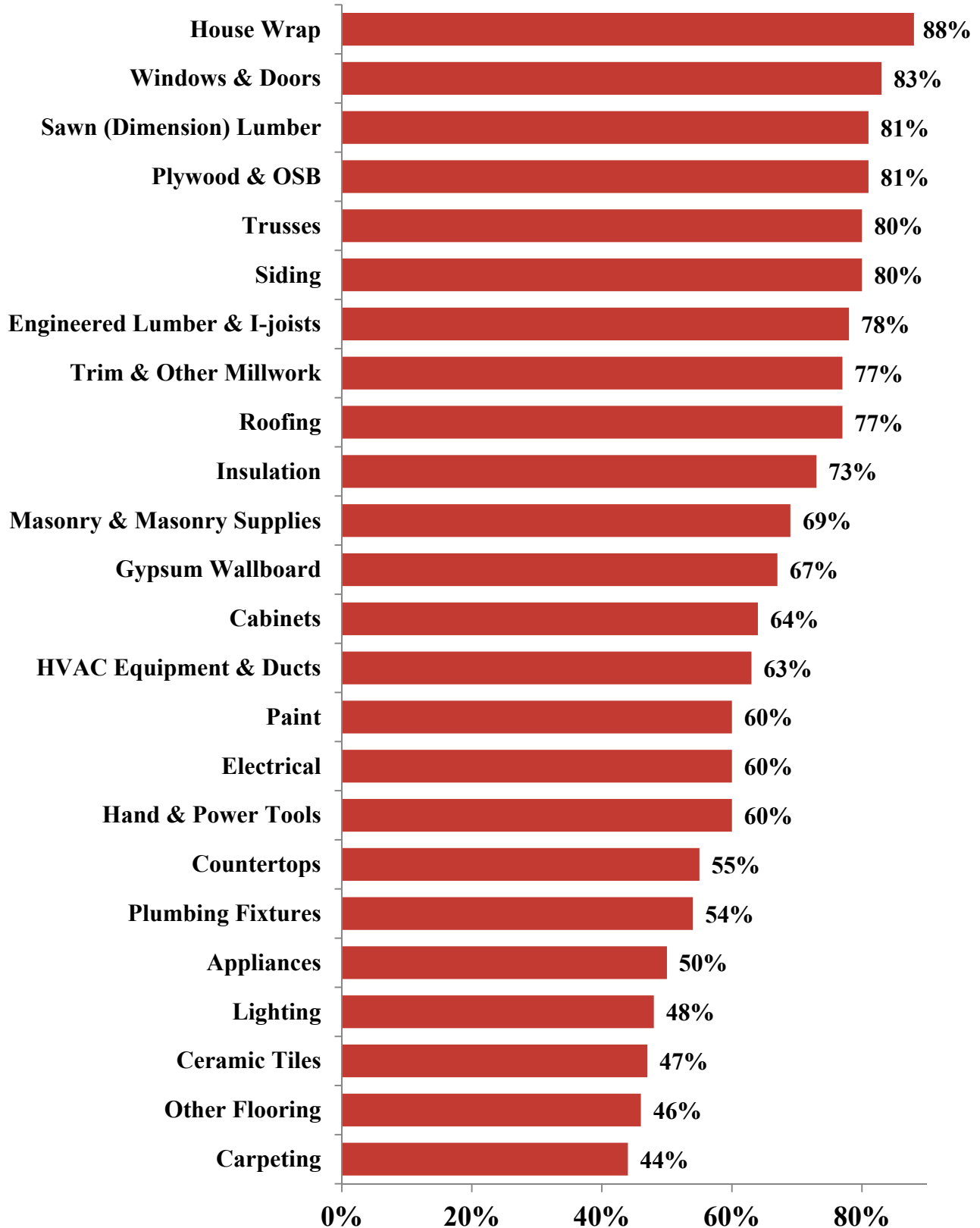


HAND & POWER TOOLS



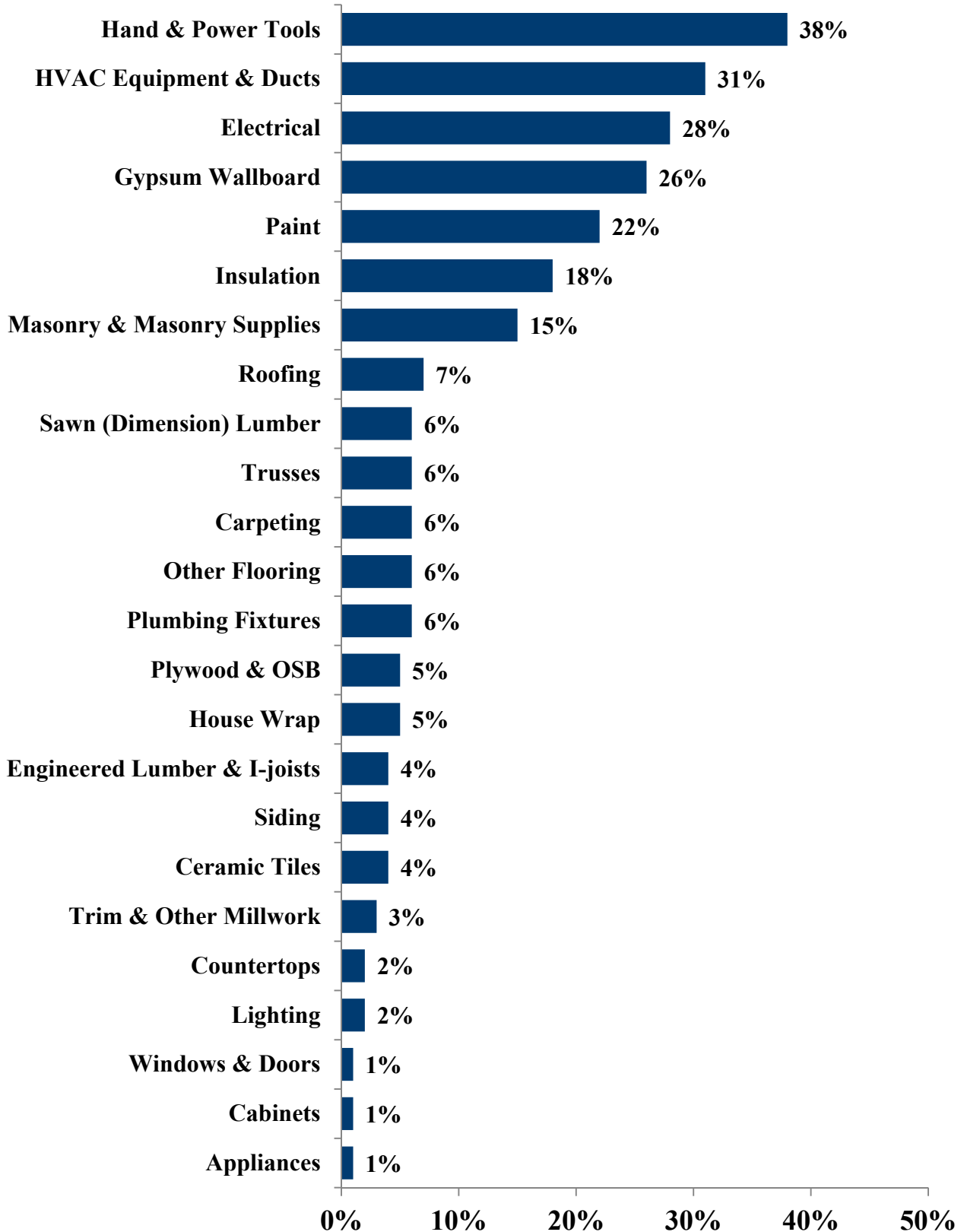
Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

BUILDER



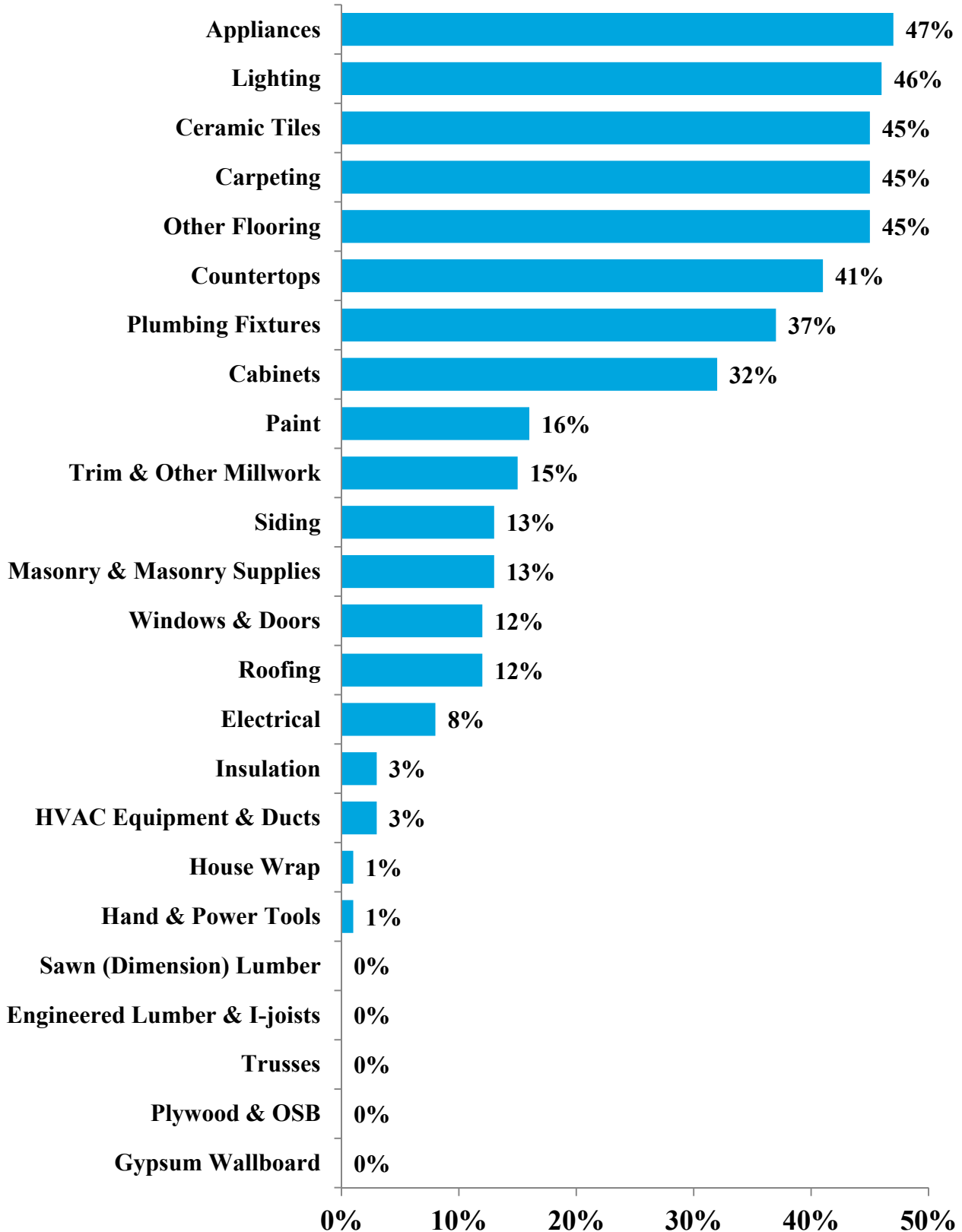
Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

SUBCONTRACTOR



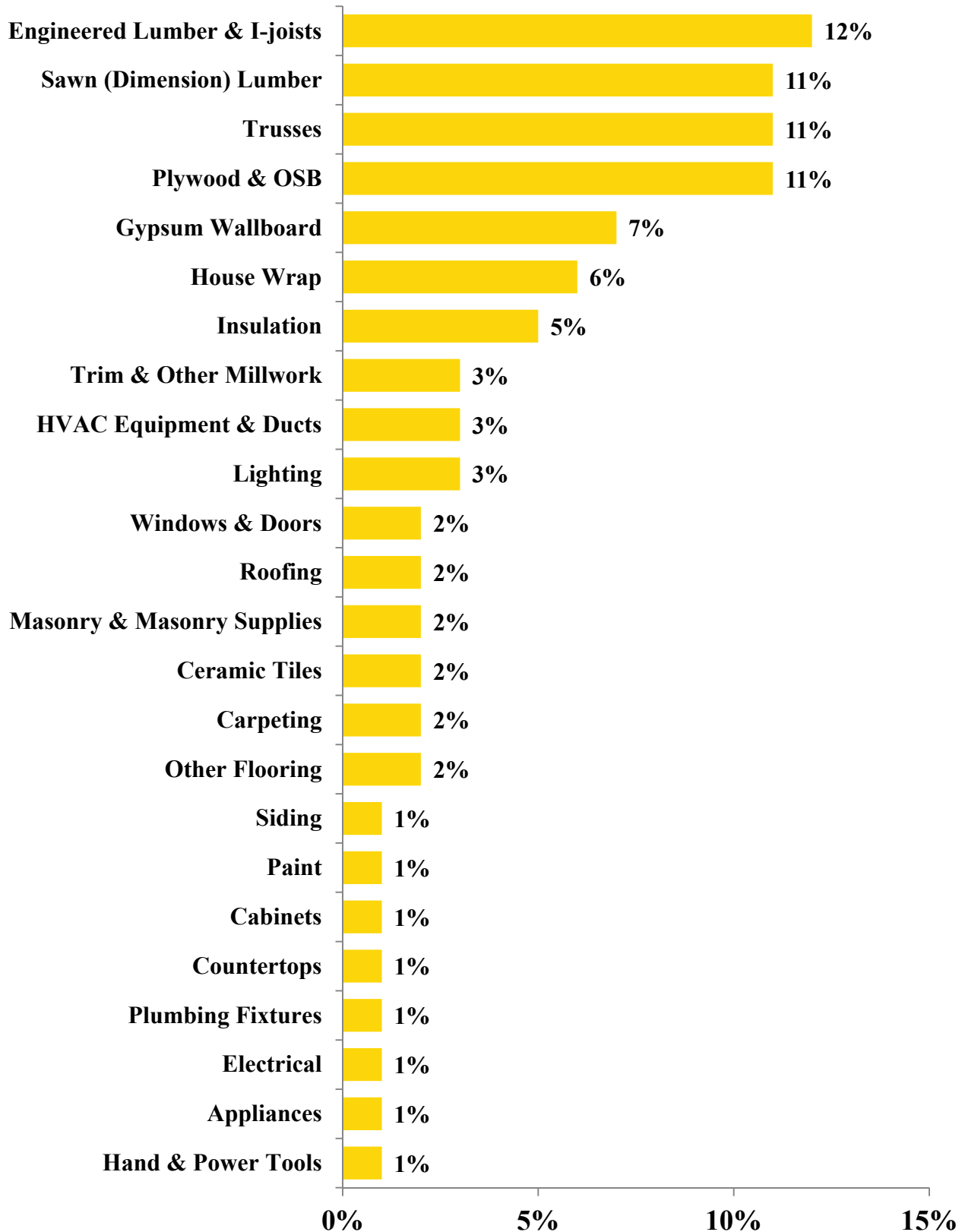
Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

CUSTOMER



Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

DEALER/SUPPLIER



Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents)

		Builder	Subcontractor	Customer	Architect	Dealer or Supplier
1	Sawn (Dimension) Lumber	81%	6%	0%	2%	11%
2	Engineered Lumber & I-joists	78%	4%	0%	6%	12%
3	Trusses	80%	6%	0%	4%	11%
4	Plywood & OSB	81%	5%	0%	2%	11%
5	Windows & Doors	83%	1%	12%	3%	2%
6	Trim & Other Millwork	77%	3%	15%	3%	3%
7	Roofing	77%	7%	12%	2%	2%
8	Siding	80%	4%	13%	2%	1%
9	Masonry & Masonry Supplies	69%	15%	13%	1%	2%
10	House Wrap	88%	5%	1%	1%	6%
11	Insulation	73%	18%	3%	1%	5%
12	Gypsum Wallboard	67%	26%	0%	0%	7%
13	Paint	60%	22%	16%	1%	1%
14	Cabinets	64%	1%	32%	1%	1%
15	Countertops	55%	2%	41%	2%	1%
16	Ceramic Tile	47%	4%	45%	2%	2%
17	Carpeting	44%	6%	45%	2%	2%
18	Other Flooring	46%	6%	45%	2%	2%
19	HVAC Equipment & Ducts	63%	31%	3%	1%	3%
20	Plumbing Fixtures	54%	6%	37%	2%	1%
21	Lighting	48%	2%	46%	2%	3%
22	Electrical	60%	28%	8%	1%	1%
23	Appliances	50%	1%	47%	1%	1%
24	Hand & Power Tools	60%	38%	1%	0%	1%

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? - HISTORY
(Percent of Respondents) – continued

	Builder			Subcontractor			Customer			Architect			Dealer or Supplier		
	Feb. 2020	Nov. 2015	Oct. 2012	Feb. 2020	Nov. 2015	Oct. 2012	Feb. 2020	Nov. 2015	Oct. 2012	Feb. 2020	Nov. 2015	Oct. 2012	Feb. 2020	Nov. 2015	Oct. 2012
Sawn (Dimension) Lumber	81%	83	84	6%	6	8	0%	1	1	2%	2	1	11%	8	6
Engineered Lumber & I-joists	78%	80	84	4%	4	8	0%	0	0	6%	5	3	12%	10	5
Trusses	80%	81	85	6%	4	6	0%	0	0	4%	5	2	11%	10	7
Plywood & OSB	81%	84	83	5%	5	8	0%	0	0	2%	1	1	11%	10	7
Windows & Doors	83%	82	84	1%	1	1	12%	12	11	3%	1	2	2%	4	2
Trim & Other Millwork	77%	79	82	3%	4	6	15%	10	6	3%	1	1	3%	5	5
Roofing	77%	73	74	7%	11	13	12%	10	10	2%	1	1	2%	5	3
Siding	80%	80	77	4%	7	9	13%	9	9	2%	1	1	1%	3	4
Masonry & Masonry Supplies	69%	67	65	15%	21	24	13%	8	6	1%	1	1	2%	3	4
House Wrap	88%	86	86	5%	6	8	1%	1	0	1%	1	0	6%	7	6
Insulation	73%	58	59	18%	32	33	3%	1	3	1%	2	1	5%	7	4
Gypsum Wallboard	67%	51	56	26%	39	38	0%	0	0	0%	1	0	7%	9	6
Paint	60%	50	53	22%	31	31	16%	13	13	1%	1	0	1%	5	3
Cabinets	64%	69	69	1%	3	4	32%	23	25	1%	1	1	1%	4	2
Countertops	55%	65	62	2%	3	6	41%	28	29	2%	1	1	1%	4	2
Ceramic Tile	47%	54	51	4%	9	12	45%	31	33	2%	1	0	2%	5	3
Carpeting	44%	52	51	6%	9	13	45%	32	33	2%	1	0	2%	6	3
Other Flooring	46%	51	51	6%	11	13	45%	32	32	2%	1	0	2%	6	3
HVAC Equipment & Ducts	63%	46	51	31%	46	43	3%	1	2	1%	1	1	3%	6	3
Plumbing Fixtures	54%	53	48	6%	18	24	37%	25	25	2%	1	1	1%	3	3
Lighting	48%	55	53	2%	5	7	46%	34	36	2%	1	1	3%	4	3
Electrical	60%	39	42	28%	52	50	8%	3	3	1%	0	1	1%	7	4
Appliances	50%	59	61	1%	1	1	47%	36	37	1%	1	1	1%	3	1
Hand & Power Tools	60%	67	69	38%	28	28	1%	0	1	0%	0	0	1%	5	3

Detailed Tables

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents)

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Sawn (Dimension) Lumber									
Builder	81	83	80	84	71	85	75	81	74
Subcontractor	6		5	4	14	1	7	9	13
Customer	0			1				2	
Architect	2	6	1	2	2	3	3		
Dealer or Supplier	11	11	15	9	13	11	15	8	13
Responses	341	35	88	162	56	102	110	64	31
Engineered Lumber & I-joists									
Builder	78	71	79	82	70	79	78	75	76
Subcontractor	4		2	2	12	2	4	6	9
Customer									
Architect	6	17	2	4	9	5	6	5	6
Dealer or Supplier	12	11	16	11	9	14	13	14	9
Responses	342	35	87	163	57	102	108	64	34
Trusses									
Builder	80	76	78	84	73	79	80	78	79
Subcontractor	6		5	5	13	5	7	5	9
Customer									
Architect	4	12	2	3	4	4	3	3	3
Dealer or Supplier	11	12	15	9	11	11	10	14	9
Responses	323	33	85	149	56	96	100	59	34
Plywood & OSB									
Builder	81	89	82	84	68	85	83	83	65
Subcontractor	5		3	3	16	2	4	6	21
Customer	0			1		1			
Architect	2	3	2	2	4	2	3	2	
Dealer or Supplier	11	9	13	10	12	10	11	9	15
Responses	345	35	88	165	57	103	110	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents) – continued

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Windows & Doors									
Builder	83	86	84	82	79	75	81	94	94
Subcontractor	1			1	2	1	1	2	
Customer	12	6	10	13	18	20	11	5	3
Architect	3	6	5	2		2	5		
Dealer or Supplier	2	3	1	2	2	3	2		3
Responses	344	35	88	164	57	102	110	64	34
Trim & Other Millwork									
Builder	77	83	78	76	75	73	76	86	76
Subcontractor	3		1	3	5	2	2	3	9
Customer	15	9	17	15	14	20	14	9	3
Architect	3	3	2	3	2	1	6		3
Dealer or Supplier	3	6	1	4	4	4	3	2	9
Responses	344	35	87	165	57	103	109	64	34
Roofing									
Builder	77	80	84	77	67	76	75	81	91
Subcontractor	7	3	5	7	11	3	7	13	3
Customer	12	11	7	13	18	17	12	6	3
Architect	2	3	2	2	4	2	5		
Dealer or Supplier	2	3	2	1	2	3	1		3
Responses	345	35	88	165	57	103	110	64	34
Siding									
Builder	80	77	80	82	77	72	81	90	79
Subcontractor	4		5	4	4	3	1	2	15
Customer	13	17	14	11	17	20	15	8	3
Architect	2	3	1	2	2	2	4		
Dealer or Supplier	1	3	1	1		2			3
Responses	338	35	88	163	52	98	110	62	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Masonry & Masonry Supplies									
Builder	69	73	64	75	59	66	69	77	79
Subcontractor	15	18	13	11	28	15	12	17	15
Customer	13	3	22	11	11	17	15	6	
Architect	1	3	1	1			3		
Dealer or Supplier	2	3	1	2	2	2	2		6
Responses	339	33	88	164	54	99	108	64	34
House Wrap									
Builder	88	91	90	91	75	91	90	86	82
Subcontractor	5		2	2	19	1	3	8	12
Customer	1			1	2	2			
Architect	1	3		1				2	
Dealer or Supplier	6	6	7	6	4	5	7	5	6
Responses	332	33	84	162	53	94	109	63	33
Insulation									
Builder	73	66	82	76	58	77	76	67	65
Subcontractor	18	20	11	14	37	12	15	28	26
Customer	3		2	4	4	8	2		3
Architect	1	6		1		1			
Dealer or Supplier	5	9	5	5	2	3	7	5	6
Responses	344	35	88	164	57	103	109	64	34
Gypsum Wallboard									
Builder	67	66	67	73	50	76	65	61	50
Subcontractor	26	29	25	19	45	20	27	31	38
Customer	0			1					
Architect	0				2				3
Dealer or Supplier	7	6	8	7	4	4	8	8	9
Responses	344	35	88	165	56	102	110	64	34
Paint									
Builder	60	60	53	62	64	58	57	63	82
Subcontractor	22	17	25	19	31	17	28	25	12
Customer	16	17	19	17	5	23	12	11	6
Architect	1	3		2		1	2		
Dealer or Supplier	1	3	2	1		2	1	2	
Responses	343	35	88	165	55	102	110	64	33

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Cabinets									
Builder	64	57	55	65	75	47	70	77	85
Subcontractor	1		1	2		2	2		3
Customer	32	34	44	29	23	48	24	23	12
Architect	1	3		2		1	2		
Dealer or Supplier	1	6		1	2	2	3		
Responses	343	35	87	165	56	102	109	64	34
Countertops									
Builder	55	49	45	59	61	36	57	72	85
Subcontractor	2	3	1	1	4	1	2	3	3
Customer	41	43	52	36	34	60	36	25	12
Architect	2	3	1	2	2	1	5		
Dealer or Supplier	1	3		1		2			
Responses	344	35	88	165	56	102	110	64	34
Ceramic Tile									
Builder	47	40	33	52	58	30	50	58	85
Subcontractor	4	6	5	5	2	2	4	10	6
Customer	45	46	60	38	38	64	40	29	9
Architect	2	3	1	2	2	1	5		
Dealer or Supplier	2	6	1	2		3	1	3	
Responses	341	35	87	164	55	102	109	62	34
Carpeting									
Builder	44	43	32	48	54	27	47	55	88
Subcontractor	6	6	6	8	4	2	6	14	6
Customer	45	43	60	39	39	67	41	28	6
Architect	2	3		3	2	1	4		
Dealer or Supplier	2	6	2	2	2	3	2	3	
Responses	340	35	88	160	57	101	108	64	34
Other Flooring									
Builder	46	46	33	49	56	28	50	58	82
Subcontractor	6	6	5	7	4	2	6	11	6
Customer	45	37	61	40	39	65	40	28	12
Architect	2	6		2	2	2	4		
Dealer or Supplier	2	6	1	2		3	1	3	
Responses	338	35	87	162	54	102	105	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
HVAC Equipment & Ducts									
Builder	63	60	74	63	49	68	56	64	65
Subcontractor	31	34	24	29	44	24	36	36	26
Customer	3	3	1	4	2	5	2		
Architect	1			1	2		1		3
Dealer or Supplier	3	3	1	4	4	3	5		6
Responses	345	35	88	165	57	103	110	64	34
Plumbing Fixtures									
Builder	54	49	42	57	65	38	61	66	79
Subcontractor	6	6	7	7	4	3	4	14	6
Customer	37	40	49	33	28	56	30	20	9
Architect	2	3	1	2	2	1	4		
Dealer or Supplier	1	3	1	1	2	2	1		6
Responses	344	35	88	164	57	103	109	64	34
Lighting									
Builder	48	37	35	53	58	32	48	61	85
Subcontractor	2	3	2	2	2		4	5	3
Customer	46	54	59	39	37	65	40	33	9
Architect	2	3	1	2	2	1	4		
Dealer or Supplier	3	3	2	3	2	2	5	2	3
Responses	345	35	88	165	57	103	110	64	34
Electrical									
Builder	60	49	63	63	55	63	57	56	65
Subcontractor	28	37	24	24	39	21	31	38	26
Customer	8	11	11	7	4	12	7	5	3
Architect	1	3		1		2		2	
Dealer or Supplier	3		2	4	2	2	5		6
Responses	343	35	88	164	56	101	110	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? (Percent of Respondents) – *continued*

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Appliances									
Builder	50	40	38	56	59	30	54	64	85
Subcontractor	1		1	1			1	2	
Customer	47	54	61	40	41	67	43	33	15
Architect	1	3		2		1	2		
Dealer or Supplier	1	3		1		2		2	
Responses	343	35	87	165	56	102	109	64	34
Hand & Power Tools									
Builder	60	73	71	57	46	71	58	52	36
Subcontractor	38	21	28	42	52	26	41	48	61
Customer	1	3		1		1			
Architect									
Dealer or Supplier	1	3	1	1	2	2	1		3
Responses	316	33	78	153	52	98	97	56	33

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents)

WITH NA/DON'T USE

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Sawn (Dimension) Lumber									
Builder	80	83	80	82	71	84	75	81	70
Subcontractor	6		5	4	14	1	7	9	12
Customer	0			1				2	
Architect	2	6	1	2	2	3	3		
Dealer or Supplier	11	11	15	8	13	11	15	8	12
NA/Don't Use	1			2		1			6
Responses	344	35	88	165	56	103	110	64	33
Engineered Lumber & I-joists									
Builder	78	71	78	81	70	79	76	75	76
Subcontractor	4		2	2	12	2	4	6	9
Customer									
Architect	6	17	2	4	9	5	5	5	6
Dealer or Supplier	12	11	16	11	9	14	13	14	9
NA/Don't Use	1		1	1		1	2		
Responses	345	35	88	165	57	103	110	64	34
Trusses									
Builder	75	74	75	76	73	75	74	72	79
Subcontractor	5		5	4	13	5	6	5	9
Customer									
Architect	4	12	2	2	4	4	3	3	3
Dealer or Supplier	11	12	15	8	11	11	9	13	9
NA/Don't Use	6	3	3	9		6	7	8	
Responses	342	34	88	164	56	102	108	64	34
Plywood & OSB									
Builder	81	89	82	84	68	85	83	83	65
Subcontractor	5		3	3	16	2	4	6	21
Customer	0			1		1			
Architect	2	3	2	2	4	2	3	2	
Dealer or Supplier	11	9	13	10	12	10	11	9	15
NA/Don't Use									
Responses	345	35	88	165	57	103	110	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents) - continued

WITH NA/DON'T USE

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Windows & Doors									
Builder	83	86	84	82	79	75	81	94	94
Subcontractor	1			1	2	1	1	2	
Customer	12	6	10	13	18	20	11	5	3
Architect	3	6	5	2		2	5		
Dealer or Supplier	2	3	1	2	2	3	2		3
NA/Don't Use									
Responses	344	35	88	164	57	102	110	64	34
Trim & Other Millwork									
Builder	77	83	78	76	75	73	76	86	76
Subcontractor	3		1	3	5	2	2	3	9
Customer	15	9	17	15	14	20	14	9	3
Architect	3	3	2	3	2	1	6		3
Dealer or Supplier	3	6	1	4	4	4	3	2	9
NA/Don't Use									
Responses	344	35	87	165	57	103	109	64	34
Roofing									
Builder	77	80	84	77	67	76	75	81	91
Subcontractor	7	3	5	7	11	3	7	13	3
Customer	12	11	7	13	18	17	12	6	3
Architect	2	3	2	2	4	2	5		
Dealer or Supplier	2	3	2	1	2	3	1		3
NA/Don't Use									
Responses	345	35	88	165	57	103	110	64	34
Siding									
Builder	78	77	80	81	70	69	81	88	79
Subcontractor	3		5	4	4	3	1	2	15
Customer	13	17	14	11	16	19	15	8	3
Architect	2	3	1	2	2	2	4		
Dealer or Supplier	1	3	1	1		2			3
NA/Don't Use	2			1	9	5		3	
Responses	345	35	88	165	57	103	110	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents) - continued

WITH NA/DON'T USE

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Masonry & Masonry Supplies									
Builder	68	69	64	75	56	63	67	77	79
Subcontractor	14	17	13	11	26	15	12	17	15
Customer	13	3	22	11	11	17	15	6	
Architect	1	3	1	1			3		
Dealer or Supplier	2	3	1	2	2	2	2		6
NA/Don't Use	2	6		1	5	4	2		
Responses	345	35	88	165	57	103	110	64	34
House Wrap									
Builder	86	86	87	90	71	86	89	84	79
Subcontractor	4		2	2	18	1	3	8	12
Customer	1			1	2	2			
Architect	1	3		1				2	
Dealer or Supplier	6	6	7	6	4	5	7	5	6
NA/Don't Use	3	6	3	1	5	6	1	2	3
Responses	342	35	87	164	56	100	110	64	34
Insulation									
Builder	73	66	82	76	58	77	76	67	65
Subcontractor	18	20	11	14	37	12	15	28	26
Customer	3		2	4	4	8	2		3
Architect	1	6		1		1			
Dealer or Supplier	5	9	5	5	2	3	7	5	6
NA/Don't Use									
Responses	344	35	88	164	57	103	109	64	34
Gypsum Wallboard									
Builder	67	66	67	73	50	76	65	61	50
Subcontractor	26	29	25	19	45	20	27	31	38
Customer	0			1					
Architect	0				2				3
Dealer or Supplier	7	6	8	7	4	4	8	8	9
NA/Don't Use									
Responses	344	35	88	165	56	102	110	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents) - continued

WITH NA/DON'T USE

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Paint									
Builder	60	60	53	62	64	58	57	63	82
Subcontractor	22	17	25	19	31	17	28	25	12
Customer	16	17	19	17	5	23	12	11	6
Architect	1	3		2		1	2		
Dealer or Supplier	1	3	2	1		2	1	2	
NA/Don't Use									
Responses	343	35	88	165	55	102	110	64	33
Cabinets									
Builder	63	57	55	65	75	47	69	77	85
Subcontractor	1		1	2		2	2		3
Customer	32	34	43	29	23	48	24	23	12
Architect	1	3		2		1	2		
Dealer or Supplier	1	6		1	2	2	3		
NA/Don't Use	0		1				1		
Responses	344	35	88	165	56	102	110	64	34
Countertops									
Builder	55	49	45	59	61	36	57	72	85
Subcontractor	2	3	1	1	4	1	2	3	3
Customer	41	43	52	36	34	60	36	25	12
Architect	2	3	1	2	2	1	5		
Dealer or Supplier	1	3		1		2			
NA/Don't Use									
Responses	344	35	88	165	56	102	110	64	34
Ceramic Tile									
Builder	47	40	33	52	56	30	50	56	85
Subcontractor	4	6	5	5	2	2	4	9	6
Customer	44	46	59	38	37	63	40	28	9
Architect	2	3	1	2	2	1	5		
Dealer or Supplier	2	6	1	2		3	1	3	
NA/Don't Use	1		1		4	1		3	
Responses	344	35	88	164	57	103	109	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents) - continued

WITH NA/DON'T USE

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Carpeting									
Builder	44	43	32	48	54	26	47	55	88
Subcontractor	6	6	6	8	4	2	6	14	6
Customer	45	43	60	39	39	67	40	28	6
Architect	2	3		2	2	1	4		
Dealer or Supplier	2	6	2	2	2	3	2	3	
NA/Don't Use	1			1		1	1		
Responses	342	35	88	162	57	102	109	64	34
Other Flooring									
Builder	45	46	33	48	55	28	49	58	82
Subcontractor	6	6	5	7	4	2	6	11	6
Customer	45	37	61	40	38	65	39	28	12
Architect	2	6		2	2	2	4		
Dealer or Supplier	2	6	1	2		3	1	3	
NA/Don't Use	1			1	2		2		
Responses	340	35	87	163	55	102	107	64	34
HVAC Equipment & Ducts									
Builder	63	60	74	63	49	68	56	64	65
Subcontractor	31	34	24	29	44	24	36	36	26
Customer	3	3	1	4	2	5	2		
Architect	1			1	2		1		3
Dealer or Supplier	3	3	1	4	4	3	5		6
NA/Don't Use									
Responses	345	35	88	165	57	103	110	64	34
Plumbing									
Builder	54	49	42	57	65	38	61	66	79
Subcontractor	6	6	7	7	4	3	4	14	6
Customer	37	40	49	33	28	56	30	20	9
Architect	2	3	1	2	2	1	4		
Dealer or Supplier	1	3	1	1	2	2	1		6
NA/Don't Use									
Responses	344	35	88	164	57	103	109	64	34

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below?

(Percent of Respondents) - continued

WITH NA/DON'T USE

	Total	Region				Total No. of Units Started in 2019			
		NE	MW	S	W	5 or Fewer	6 to 24	25 to 99	100+
Lighting									
Builder	48	37	35	53	58	32	48	61	85
Subcontractor	2	3	2	2	2		4	5	3
Customer	46	54	59	39	37	65	40	33	9
Architect	2	3	1	2	2	1	4		
Dealer or Supplier	3	3	2	3	2	2	5	2	3
NA/Don't Use									
Responses	345	35	88	165	57	103	110	64	34
Electrical									
Builder	60	49	63	63	55	63	57	56	65
Subcontractor	28	37	24	24	39	21	31	38	26
Customer	8	11	11	7	4	12	7	5	3
Architect	1	3		1		2		2	
Dealer or Supplier	3		2	4	2	2	5		6
NA/Don't Use									
Responses	343	35	88	164	56	101	110	64	34
Appliances									
Builder	50	40	38	56	59	30	54	64	85
Subcontractor	1		1	1			1	2	
Customer	47	54	60	40	41	66	43	33	15
Architect	1	3		2		1	2		
Dealer or Supplier	1	3		1		2		2	
NA/Don't Use	0		1			1			
Responses	344	35	88	165	56	103	109	64	34
Hand & Power Tools									
Builder	56	71	65	53	43	69	52	47	35
Subcontractor	36	21	26	39	48	25	37	44	59
Customer	1	3		1		1			
Architect									
Dealer or Supplier	1	3	1	1	2	2	1		3
NA/Don't Use	6	3	7	6	7	4	9	10	3
Responses	337	34	84	163	56	102	107	62	34

Appendix I: Survey Questionnaire: HMI Special Questions for February 2020

Q4. On your typical construction project, who has the greatest influence on selection of the products listed below? Check (✓) ONLY ONE for each product.

	Builder	Subcontractor	Customer	Architect	Dealer or Supplier	NA / Don't Use
1 Sawn (Dimension) Lumber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Engineered Lumber & I-joists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Trusses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Plywood & OSB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Windows & Doors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Trim & Other Millwork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Roofing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Siding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Masonry & Masonry Supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 House Wrap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 Insulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 Gypsum Wallboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 Paint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 Cabinets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 Countertops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 Ceramic Tile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17 Carpeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 Other Flooring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 HVAC Equipment & Ducts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20 Plumbing Fixtures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21 Lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22 Electrical	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23 Appliances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24 Hand & Power Tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

THANK YOU