The Business of Architecture 2020

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Overview

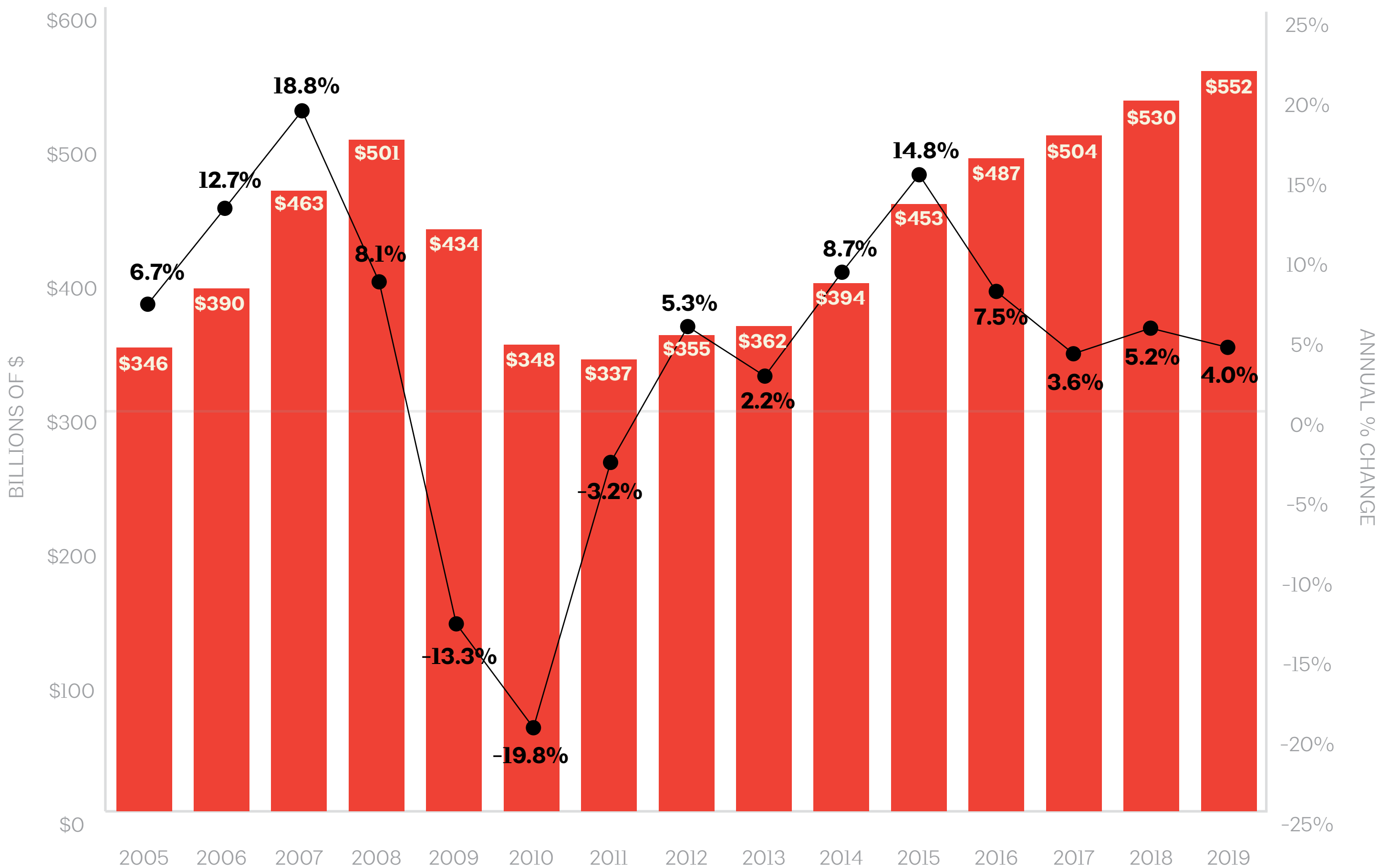
1. Heading into the pandemic-induced recession, architecture firms had benefited from several years of healthy business conditions. With an economic expansion of record duration and a strong construction market, firms were typically more focused on finding qualified staff and meeting their design schedules than they were on bringing in new projects. Having healthy project backlogs has cushioned the initial impact of the downturn for many firms.

2. Years of healthy business conditions encouraged firms to expand and has helped to create more diversity in the architectural profession.

3. Increased emphasis on the sustainability and resiliency of our building stock has contributed to an increased share of design activity to be focused on retrofitting and improving existing facilities.

FIGURE 1.1: **Building activity continued to see healthy growth through 2019**

National spending on nonresidential building, in billions of US dollars, and annual % change



Source: US Census Bureau

In 2019, there was more than $550 billion spent on constructing and improving nonresidential buildings nationally, and a comparable amount devoted to building and improving our owner-occupied and rental housing stock. Between 2011 and 2019, spending on buildings grew by more than $200 billion, having increased by almost 65% since the depths of the Great Recession. Revenue at architecture firms[1] has reflected this overall increase in construction activity. Net billings at firms (which exclude pass-throughs and reimbursables) increased over 40% nationally between 2017 and 2019, and more than doubled since the low point of the last industry cycle in 2011. **(FIGURE 1.1)**

Construction activity has been significantly slowed by the international pandemic, which has lowered the demand for many types of facilities not only in the U.S. but internationally, and therefore has dramatically reduced demand for design services in most building sectors. According to the AIA's Architecture Billings Index (ABI), the spring and early summer months of 2020 saw some of the steepest declines in billings at architecture firms since the index was introduced 25 years ago.[2]

Larger firms continue to dominate the profession

By national standards, the architecture profession is comprised of an unusually large share of small businesses. Of the approximately 19,000 AIA member-owned architecture firms in 2019, over a quarter were sole practitioners, and 60% had fewer than five employees on their payroll. Only about 6.5% of

[1] For this report, information is reported for those architecture firms where an AIA member has an ownership position. Research conducted by the AIA estimates that these firms generate almost two-thirds of architectural and related services revenue, according to the U.S. Census Bureau's quarterly services surveys.

[2] ABI results are available monthly on the AIA website. An extensive review of the performance of the ABI in predicting future levels of construction activity: Designing the Construction Future: Reviewing the Performance and Extending the Applications of the AIA's Architecture Billings Index is also available at no charge on the AIA's website.

FIGURE 1.2A: **Firms with 50+ employees account for half of revenue and staffing nationally**

Percent of all firms, staff and gross billings by firm size for 2019

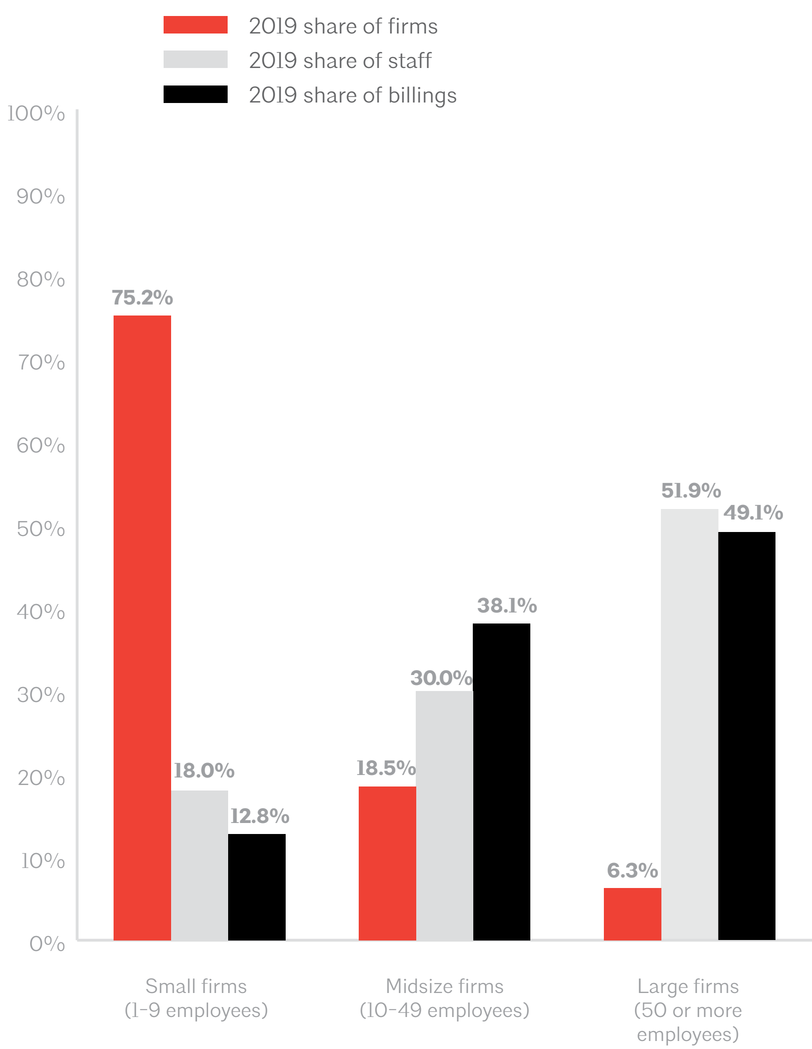
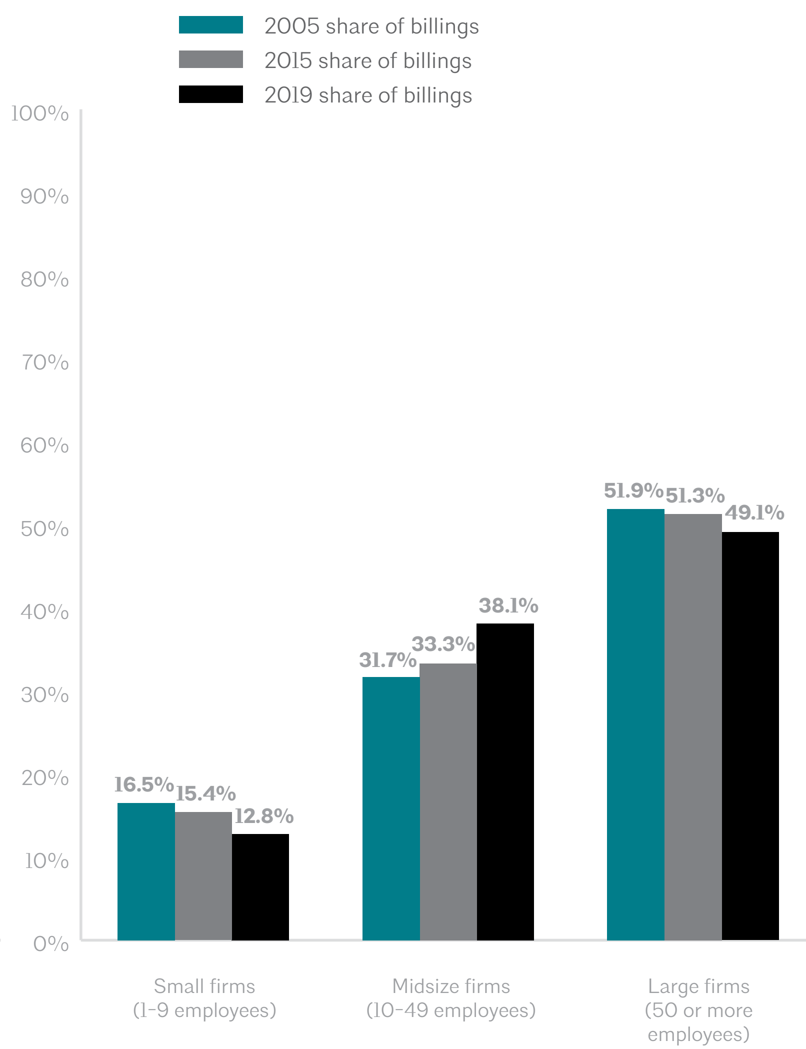


FIGURE 1.2B: **Midsize firms account for growing share of architecture firm billings**

Percent of billings by firm size for 2005, 2015, and 2019



firms had 50 or more employees, with 2.5% with 100 or more employees on their payroll. On average, there are 12 employees for each firm nationally.

Despite this general fragmentation across the profession, larger firms continue to have an outsize impact on the profession. Architecture firms with 100 or more employees account for 30% of employment nationally, and 30% of total billings. Firms with 50 or more employees account for over half of employment in private practice, and almost half of revenue generated. **(FIGURE 1.2A)**

In 2005, during a period of very strong construction activity, firms with fewer than 10 employees accounted for 16.5% of total billings at architecture firms. That share has been steadily eroding, and by the end of 2019, stood at just 12.8% of billings across the profession. **(FIGURE 1.2B)**

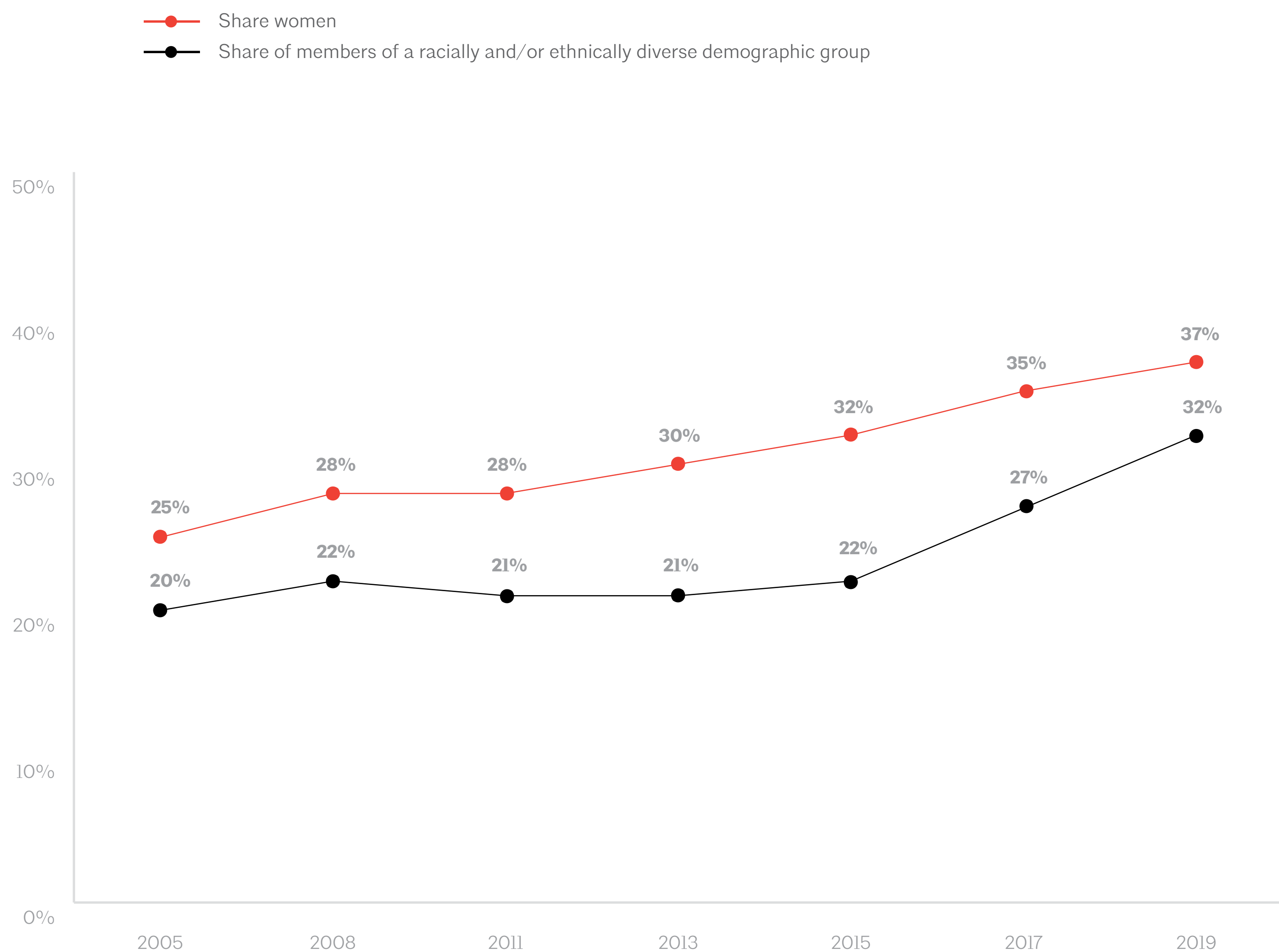
Diversity continues on the upswing

Women and members of a racially and/or ethnically diverse demographic group continue to account for an increased share of architectural positions at the nation's architecture firms. Between 2008 and 2019, the women's share of architectural positions increased from 28% to 37%, while the share from a racially and/or ethnically diverse demographic group increased from 22% to 32%. However, in spite of these impressive gains, the architecture profession continues to be underrepresented along key demographic characteristics. In the broader labor force in 2019, 47% were women and the share of members of a racially and/or ethnically diverse demographic group was approaching 40%.[3] So, while the gap in composition between

[3] Source: Current Population Survey for 2019, US Census Bureau.

FIGURE 1.3: **Diversity among architecture staff is increasing, but still lags national workforce**

Women and members of a racially and/or ethnically diverse demographic group as percentage of all architecture staff



architecture and the broader national workforce is shrinking by gender as well as by racial/ethnic compositions, it has not yet disappeared. **(FIGURE 1.3)**

These gaps are expected to shrink even more in the coming years as more women and members of racially and/or ethnically diverse demographic groups enter the architectural profession. In 2019, 37% of all architecture staff were women, as were 46% of emerging professionals at firms on a path toward licensure and 53% of architecture students working at firms. Likewise, in 2019, almost half (49%) of emerging professionals on a licensure path were members of a racially and/or ethnically diverse demographic group, as were 43% of students working at firms, even though only 32% of overall architecture staff fell into these categories.

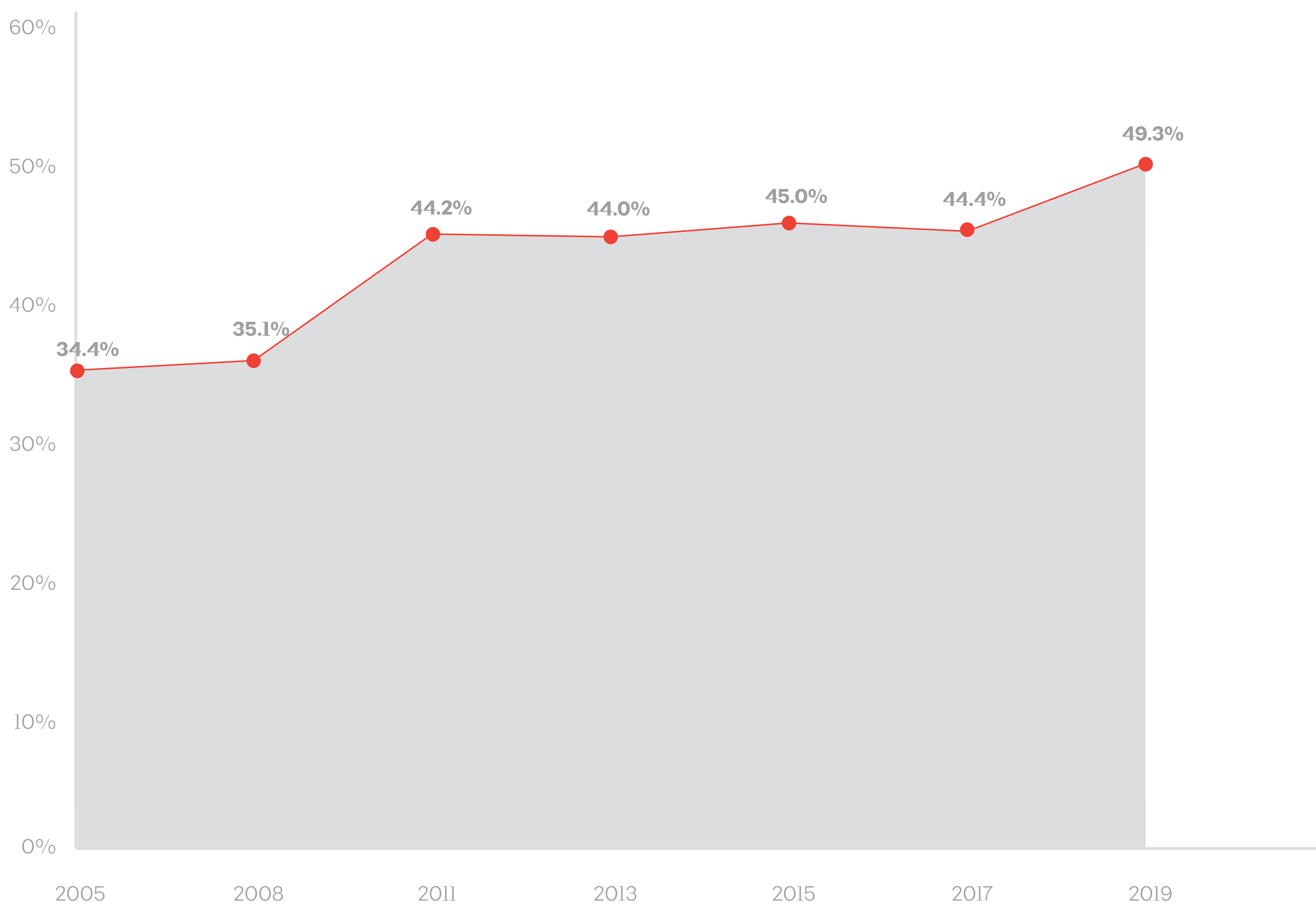
Retrofitting the existing building stock

While designing new facilities is typically considered a core competency of architects, renovating existing buildings is an increasing share of the workload at a typical firm. Even during the building boom running up to the Great Recession, U.S. architecture firms reported that, on average, over a third of their billings were for work on—or additions to—existing buildings. As the Great Recession slowed the demand for new buildings, the share of billings from work on the existing building stock rose to around 45%.

However, even as the construction market slowly recovered with the economic expansion following the Great Recession, the share of design activity devoted to existing buildings held steady. Part of the reason for this is that there was a significant glut of underutilized buildings in many markets across the country, which created less of a need to build new ones. Additionally, with a growing focus on making the building stock more sustainable,

FIGURE 1.4: **Despite healthy new construction market, share of spending on existing buildings has been increasing**

Renovations, rehabilitations, additions, and historic preservation as percentage of firm building* design billings



* The value of nonconstruction-related services is excluded from this calculation.

there was growing motivation on the part of government, nonprofits, and private property owners to upgrade the existing building stock.

By 2019, the share of architecture firm billings devoted to work on existing buildings climbed to over 49%. There are several reasons why this share is expected to remain at or near this elevated level for some time. Growth in the U.S. population and economy are expected to continue to moderate in coming years. Also, the continued emphasis on the sustainability of the building stock will encourage investment in existing buildings. **(FIGURE 1.4)**

With growing concerns over building design emerging from the pandemic, there will likely be a significant increase in retrofit activity. Given growing public awareness of public health risks in general, it's likely that most facilities where customers or employees generally are in close proximity will need some redesign to accommodate these concerns. Additionally, with almost six million buildings nationally, according to estimates from the Energy Information Administration, this should add up to a lot of redesign activity. Facilities that are likely to be priorities include offices (over a million buildings nationally), retail and food service establishments (about one million), educational facilities (400,000), amusement, recreational facilities and other building of public assembly (almost 400,000), healthcare facilities (approaching 200,000), and lodging facilities (also approaching 200,000).

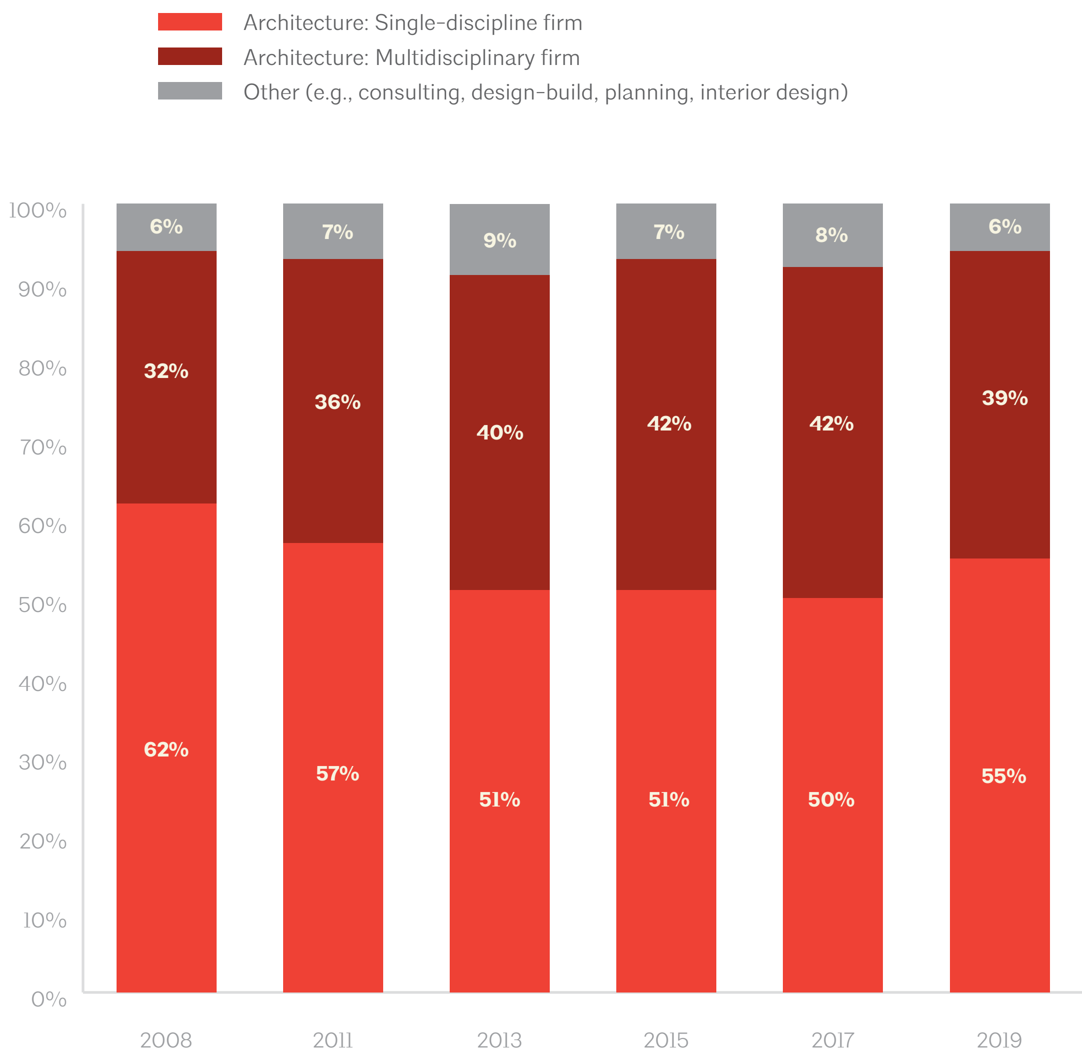
Many of these buildings not only need to comply with emerging public health concerns, but independently would profit from upgrading. An estimated 40% of the national building stock is over 50 years old. Many of these facilities would benefit from systems upgrades, exterior replacements and enhancements, the renovation of key internal spaces and other design upgrades that architects could provide.

Firm and staff profile

This chapter overviews the key findings related to firm and staff profiles, including data and trends on firm disciplines, firm characteristics, staffing, demographics, sustainability credentials, firm planning, and firm practices.

FIGURE 2.1: **Share of multidisciplinary architecture firms decreases for the first time in over 10 years as the share of single-disciplinary firms increases**

% of firms



Firm disciplines offered

- 55% of architecture firms are single discipline, up five percentage points from 2017 and the first time in over 10 years that the share of single-discipline firms increased. **(FIGURE 2.1)**
- The percentage of single-discipline firms is especially high among smaller firms and those specializing in residential work.
- Over half of firms offered architecture (99%), interior design (58%), zoning/code compliance (54%), and predesign services (53%) in 2019, similar to the design-related disciplines and specialties offered by firms in 2015 and 2017.
- 45% of firms offered planning services in 2019, a decrease of six percentage points from 2017.

Firm characteristics

- 35% of firms are S corporations, up six percentage points from 2017, while 18% of firms are sole proprietorships, down four percentage points from 2017.
- 45% of firms reported being federally recognized as a small business in 2019, a decrease of 13 percentage points since 2017, while 57% of firms reported being recognized as a small business at a state or local level.
- Architecture firms reported an average of three permanent domestic offices in 2019, a decrease of one office since 2017.

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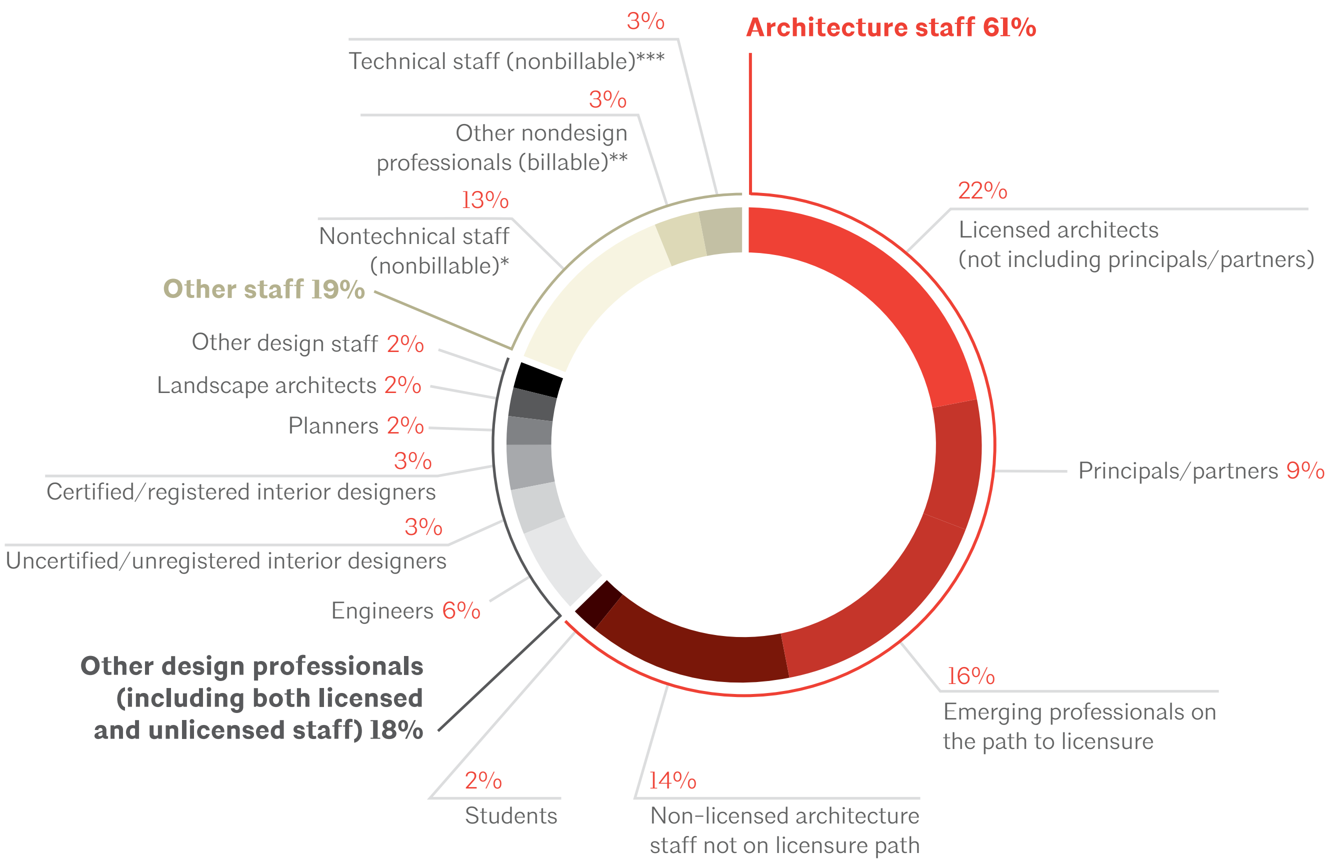
FIGURE 2.2: **Architecture staff continue to account for the majority of architecture firm employees**

Averages across all architecture firms, weighted by number of positions



* e.g., controller, bookkeeper, accounting clerk, business development manager, marketing manager/assistant, human resources director/manager, office manager, administrative assistant, receptionist, librarian, in-house legal counsel

** Professional staff other than architects, designers, or other design professionals who are typically billed directly on projects (e.g., healthcare professionals, educational professionals)

*** e.g., CAD manager, IT manager/director

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Staffing: full-time employees

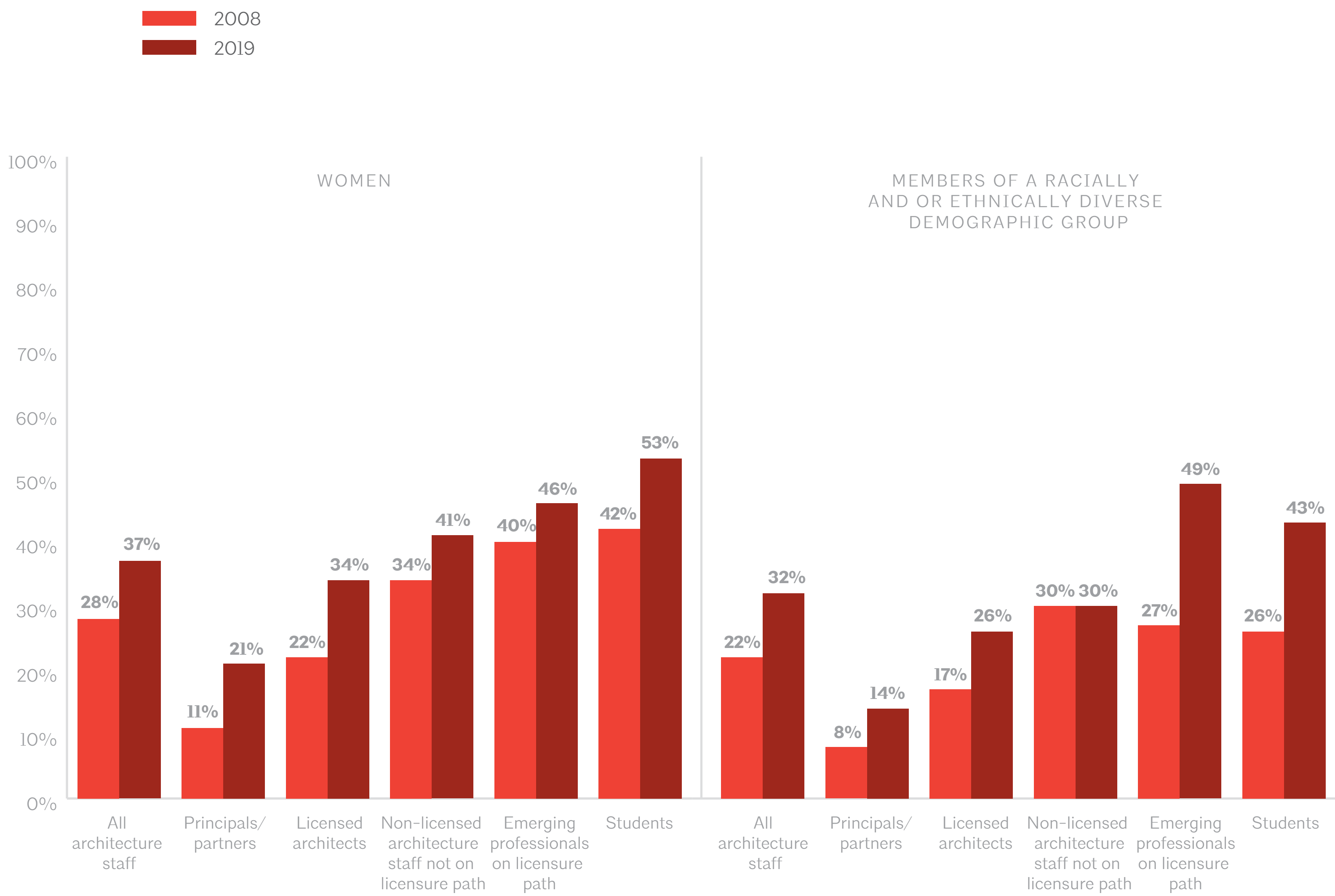
- Firm size increased significantly in 2019 to an average of 64 employees, from 50 employees in 2017.
- The share of architecture firm employees that are architecture staff has generally held steady in recent years, averaging 61% in 2019.
- The percentage of other design professionals (e.g., engineers, interior designers) continued to decrease in 2019, falling to 18%.
- Non-licensed architecture staff accounted for an average of 14% of architecture firm employees in 2019, an increase of six percentage points since 2017.

Staffing: contract employees, part-time employees, and consultants

- 53% of firms' contract staff are architecture staff, a 16-percentage-point increase from 2017 that resembles 2015.
- 30% of firms' contract staff are other design professionals, a decrease of 11 percentage points from 2017.
- Only 2% of architecture staff were reported as part-time in 2019, a similar share of staff as in recent years.
- Use of all types of consultants increased in 2019, with building performance model consultants seeing the largest increase from 2017. **(FIGURE 2.2)**

FIGURE 2.3: **Share of women and members of a racially and/or ethnically diverse demographic group in architecture staff positions continues to expand, although there remain disparities in leadership roles**

Share of architecture staff by position



Demographics

- The share of female architecture staff continued to increase in 2019, rising to 37% overall. **(FIGURE 2.3)**
- While this figure has continued to increase over the last decade, there continues to be a large disparity of women in leadership roles—they account for just 21% of principals/partners.
- 32% of architecture staff self-identified as a member of a racially and/or ethnically diverse demographic group in 2019, a 10-percentage-point increase from a decade ago.
- Looking toward the future, staffing makeup will likely continue to be more diverse as self-identified members of a racially and/or ethnically diverse demographic group accounted for 49% of emerging professionals and 43% of students in 2019; both of which have increased over 15 percentage points since 2008.

Sustainability credentials

- 65% of firms reported having some payroll staff in their office that maintain specialty sustainability or resilience credentials in 2019, with large firms and institutional firms being more likely to report having staff with these credentials.
- 14% of firms reported plans to use training in-house for existing staff to acquire sustainability and resilience skills on staff, with large firms more likely to do so than smaller firms.

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FIGURE 2.4: **Ownership transition plans are common among large firms while small firms are more likely to have a written business plan**

% of firms with types of plans in place

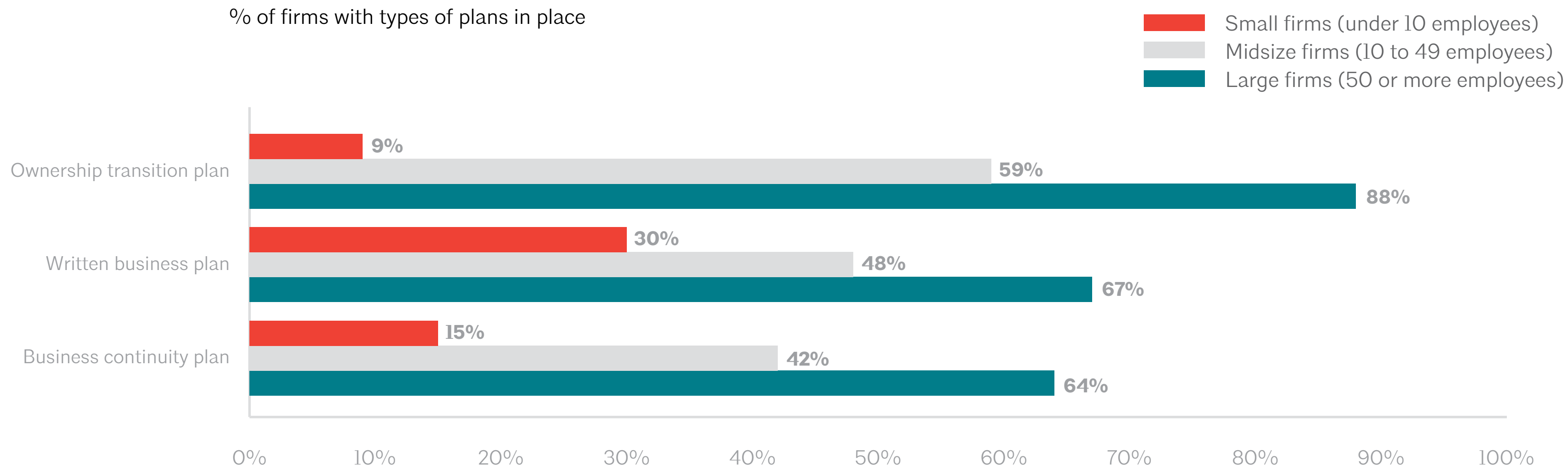
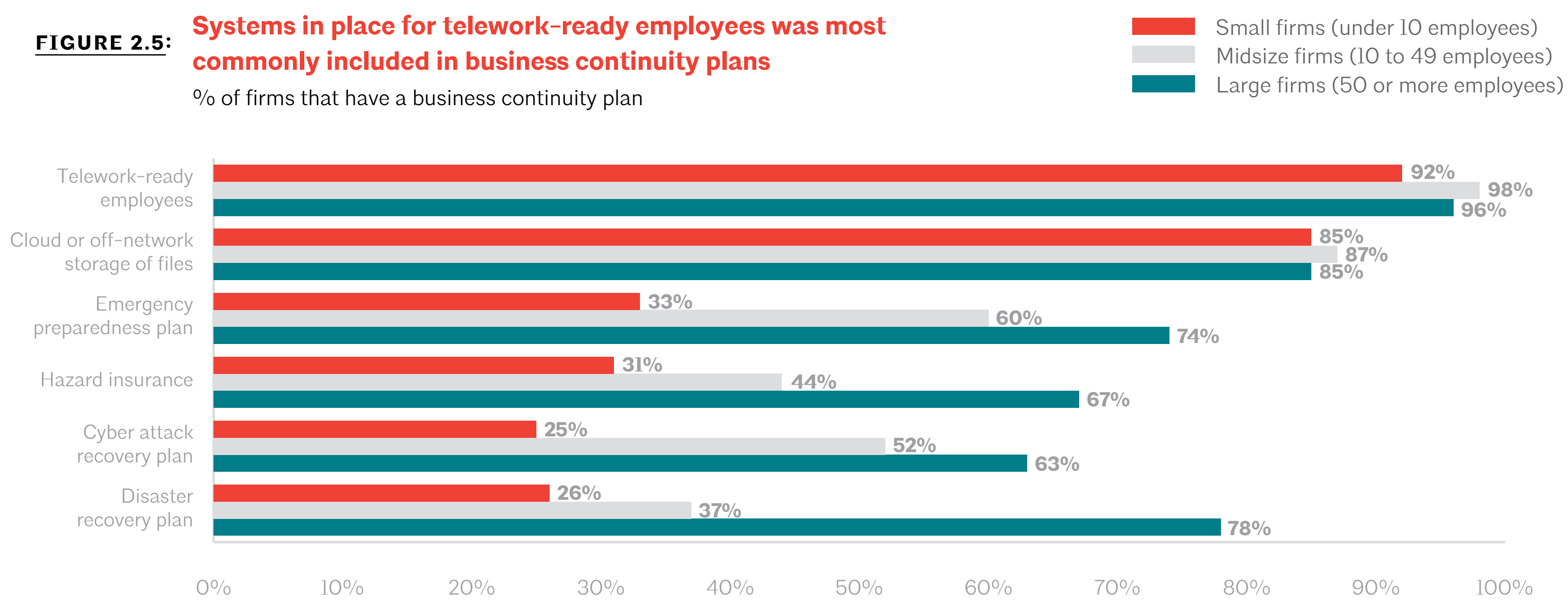


FIGURE 2.5: **Systems in place for telework-ready employees was most commonly included in business continuity plans**

% of firms that have a business continuity plan

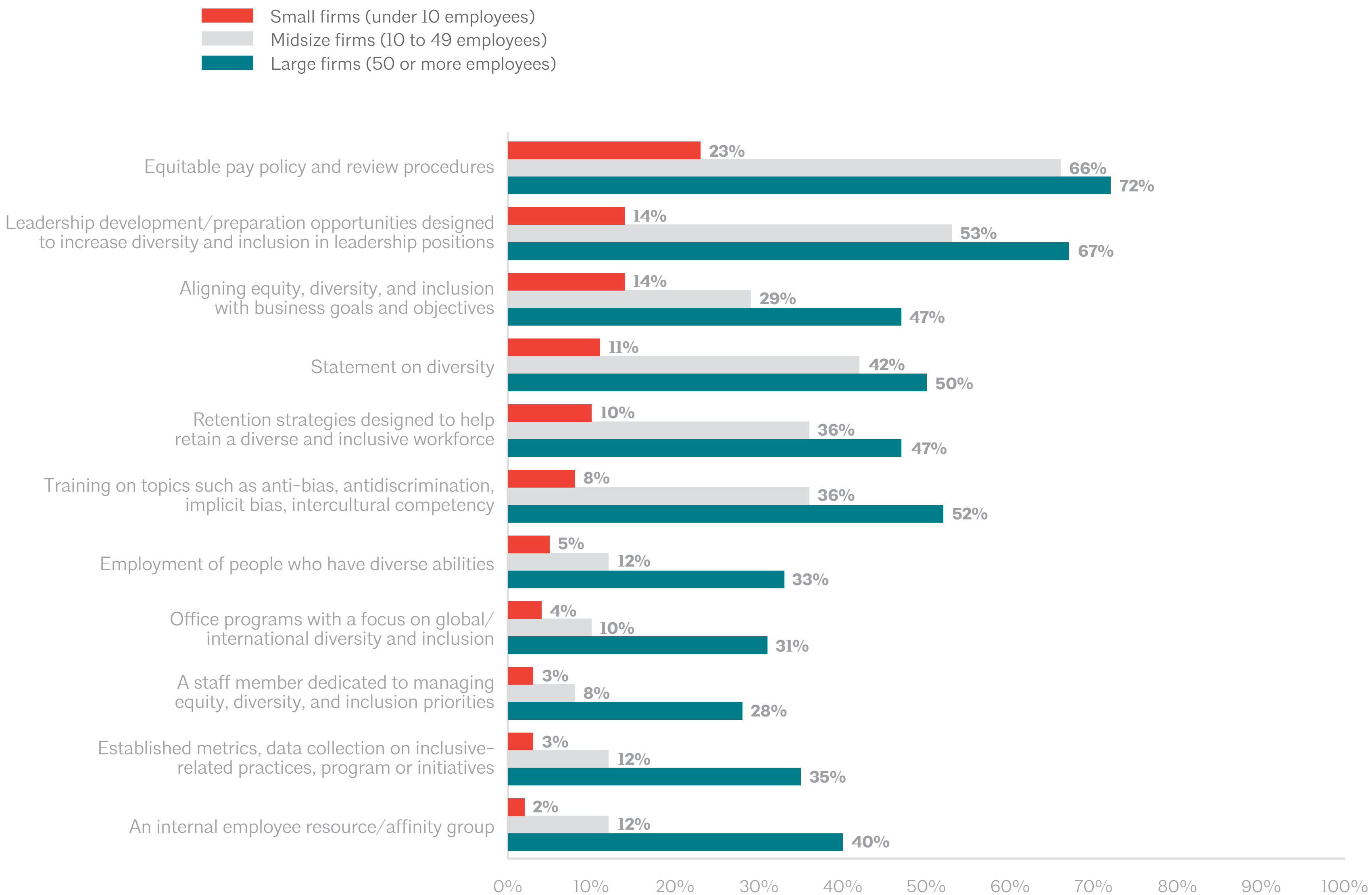


Firm planning

- There is a significant divide between smaller firms and larger firms in the formation of an ownership transition plan, written business plan, and business continuity plan. **(FIGURE 2.4)**
- Ownership transition plan: 88% of firms with 50 or more employees reported having an ownership transition plan, compared with 59% of firms with 10 to 49 employees, and just 9% of firms with fewer than 10 employees.
- Written business plan: 30% of small firms had a written business plan in 2019, as well as nearly half (48%) of midsized firms and two-thirds of firms with 50 or more employees.
- Of the firms with a business continuity plan in 2019, 95% reported having systems in place for telework-ready employees as well as 86% reporting cloud or off-network storage of files. **(FIGURE 2.5)**
  - Large firms were more likely to report having an emergency preparedness plan compared with smaller firms, with 78% of large firms having one.

FIGURE 2.6: Internal equitable and inclusive practices are more standard at midsize and large firms

% of firms

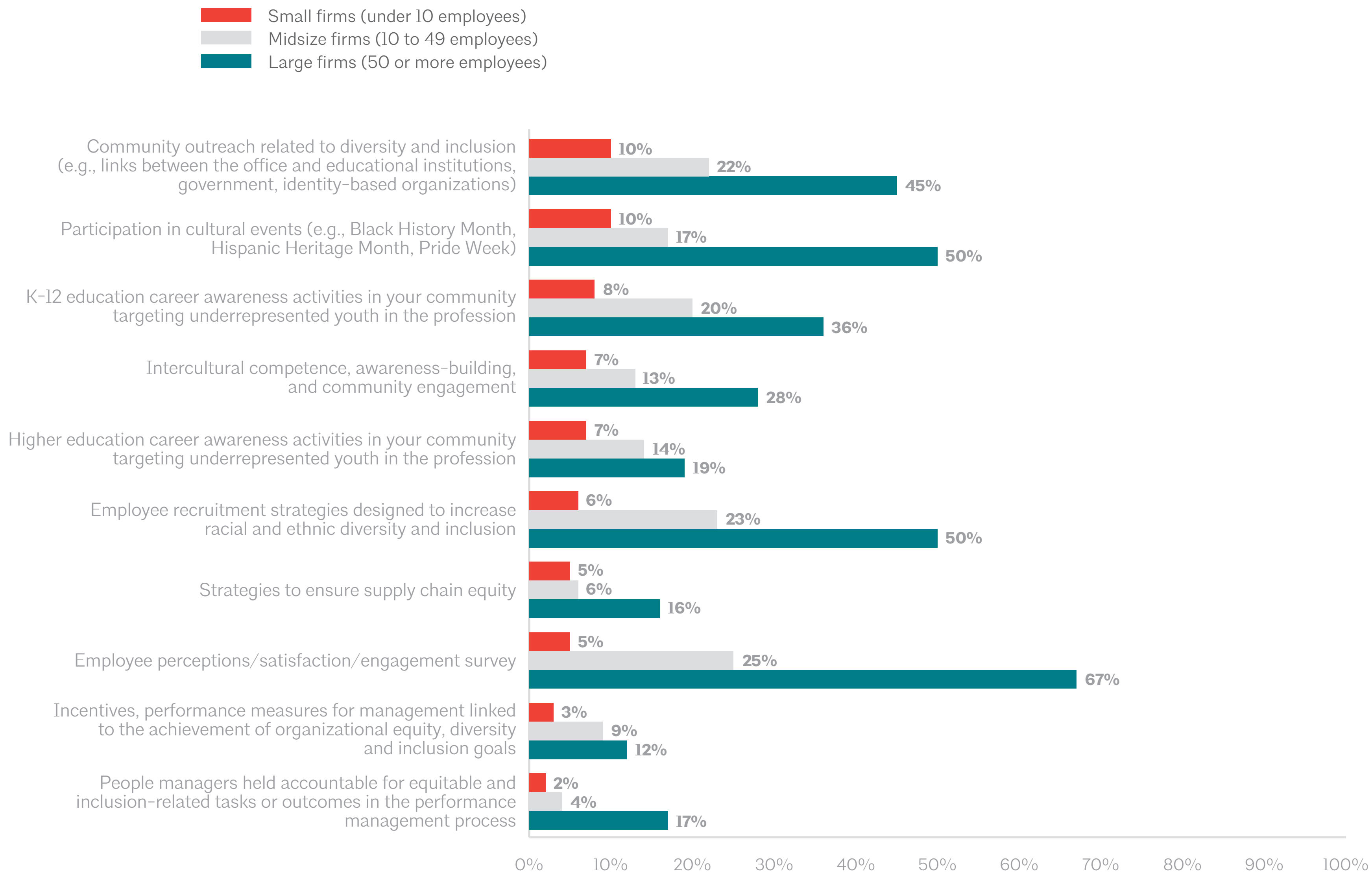


Internal equitable and inclusive practices

- 90% of firms with 50 or more employees reported having some type of internal equitable and inclusive practices in place, compared with 85% of firms with 10 to 49 employees and about 37% of firms with fewer than 10 employees.
- The top internal practice reported was equitable pay policy, regardless of firm size, with 23% of small firms reporting having a policy in place, as well as 66% of midsize firms, and 72% of large firms.
  - 14% of small firms also reported that they provide leadership development/preparation opportunities designed to increase diversity and inclusion in leadership positions, and 14% also reported that they work to align equity, diversity, and inclusion with their business goals and objectives.
  - At least half of large firms also reported that their internal equitable and inclusive practices include leadership development/preparation opportunities designed to increase diversity and inclusion in leadership positions (67%); training on topics such as anti-bias, anti-discrimination, implicit bias, and intercultural competency (52%); and a statement on diversity (50%). **(FIGURE 2.6)**

FIGURE 2.7: **External equitable and inclusive practices are being adopted differently across firms of different sizes**

% of firms



External equitable and inclusive practices

- Over 90% of firms with 50 or more employees reported having some type of external equitable and inclusive practices in-place compared with 58% of firms with 10 to 49 employees and less than 30% of firms with fewer than 10 employees.
  - The types of external practices most commonly used by firms vary widely by firm size, with firms with 10 or more employees most commonly reporting use of employee perception/satisfaction/engagement surveys, while small firms cited community outreach and participation in cultural events.
  - Midsize firms were also likely to report offering community outreach related to diversity and inclusion, K–12 education career awareness activities in their community targeting underrepresented youth in the profession, and employee recruitment strategies designed to increase racial and ethnic diversity and inclusion.
  - At least half of large firms reported that they use employee recruitment strategies designed to increase racial and ethnic diversity and inclusion (50%), employee perception/satisfaction/engagement surveys (67%), and participation in cultural events like Black History Month and Pride Week (50%) as part of their external equitable and inclusive practices. **(FIGURE 2.7)**

Client satisfaction

- Few small firms have surveyed clients regarding satisfaction (37%) compared with large firms (79%).

Quality Assurance/Quality Control processes

- 52% of firms have a Quality Assurance (QA) or Quality Control (QC) processes in place with nearly all large firms (93%) having one in place.
- Of firms with QA/QC processes in place, checklists are included in 77% of firms, while 56% of firms with these processes in place review for QA/QC prior to major milestones, and 33% of firms review intermittently as needed.

For more detailed data on the topics covered in this chapter, see Appendix tables 1.1–1.31.

Firm billings and finances

This chapter reviews the key findings and trends related to financial aspects of architecture firms, including billings and profitability, project and billing methods, client types, pro bono work, and financial indicators.

FIGURE 3.1: **Architecture firm billings remained strong through 2019**

Billings at architecture firms, in billions of US dollars

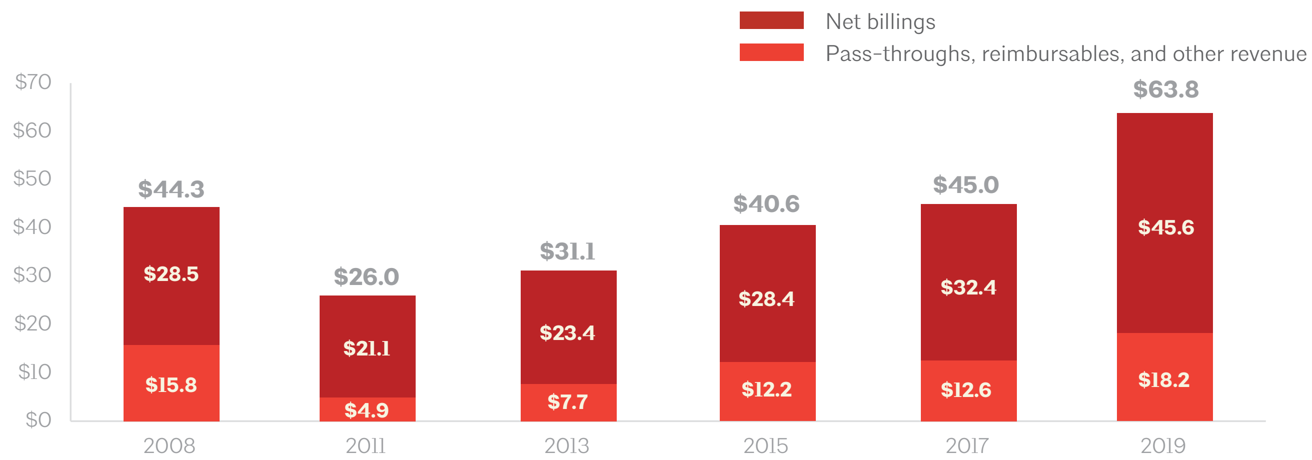
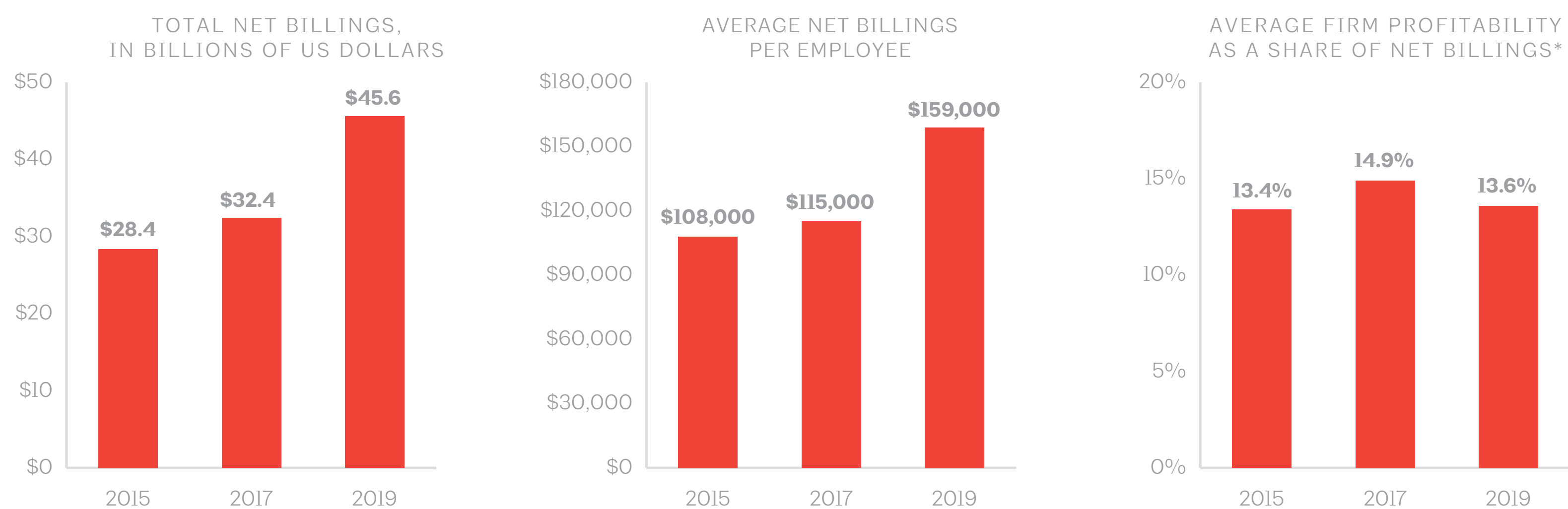


FIGURE 3.2: **Despite a modest decline in profitability, architecture firms remain prosperous**

(See each data set for units)



* Firms were asked to compute profit as a percentage of net billings after all compensation was paid (including owners'/principals' compensation), but before paying out any taxes, bonuses, or profit-sharing

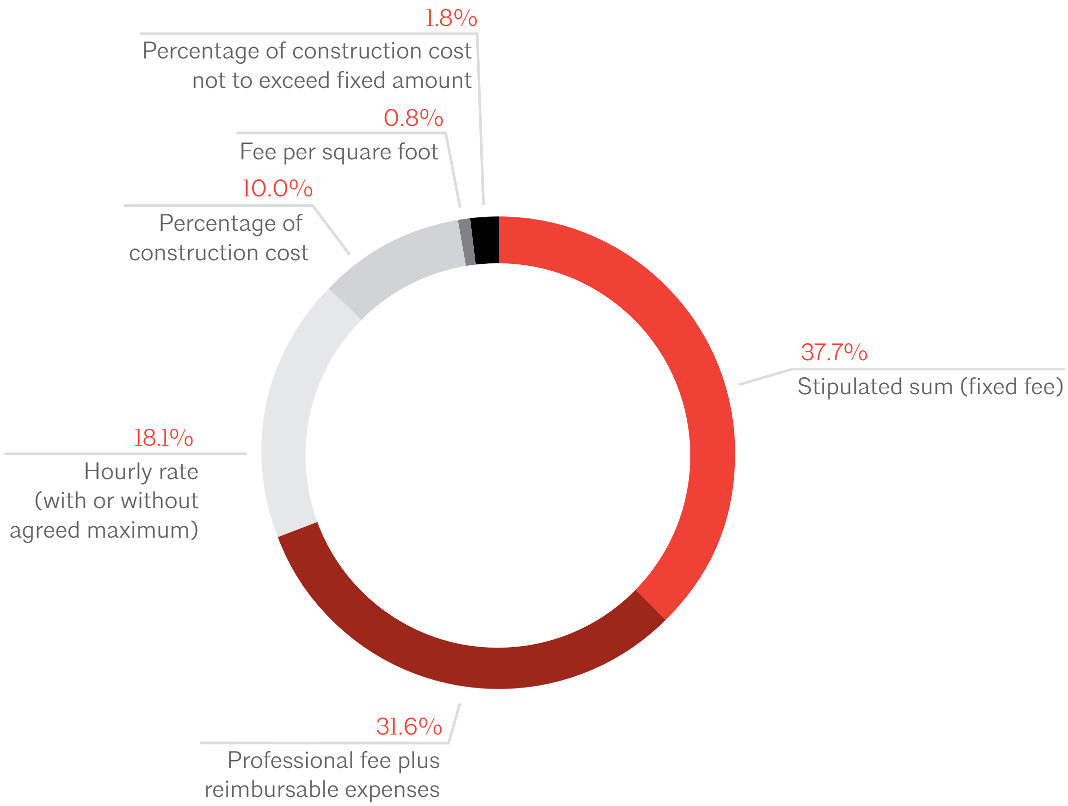
Billings and profitability

- Architecture firm gross billings totaled $63.8 billion in 2019, rising at an inflation-adjusted rate of 16.6% between 2017 and 2019.
- 71% of total firm billings in 2019 were from net billings, similar to 2017, while 26% were from pass-throughs/reimbursables, and 3% were from other revenue. **(FIGURE 3.1)**

- Net billings per employee averaged $159,000 in 2019 and were generally highest at midsize firms.
- Firm profitability as a share of net billings averaged 13.6% in 2019, a decrease of 1.3 percentage points from 2017. **(FIGURE 3.2)**
  - — Firms with a commercial/industrial specialization reported the highest profitability at 14.8%, and larger firms also tended to report higher profitability relative to smaller firms.

FIGURE 3.3: **More than two thirds of architecture firm billings are billed using stipulated sum, professional fee plus reimbursable expense methods**

% of firm billings by billing method, 2019

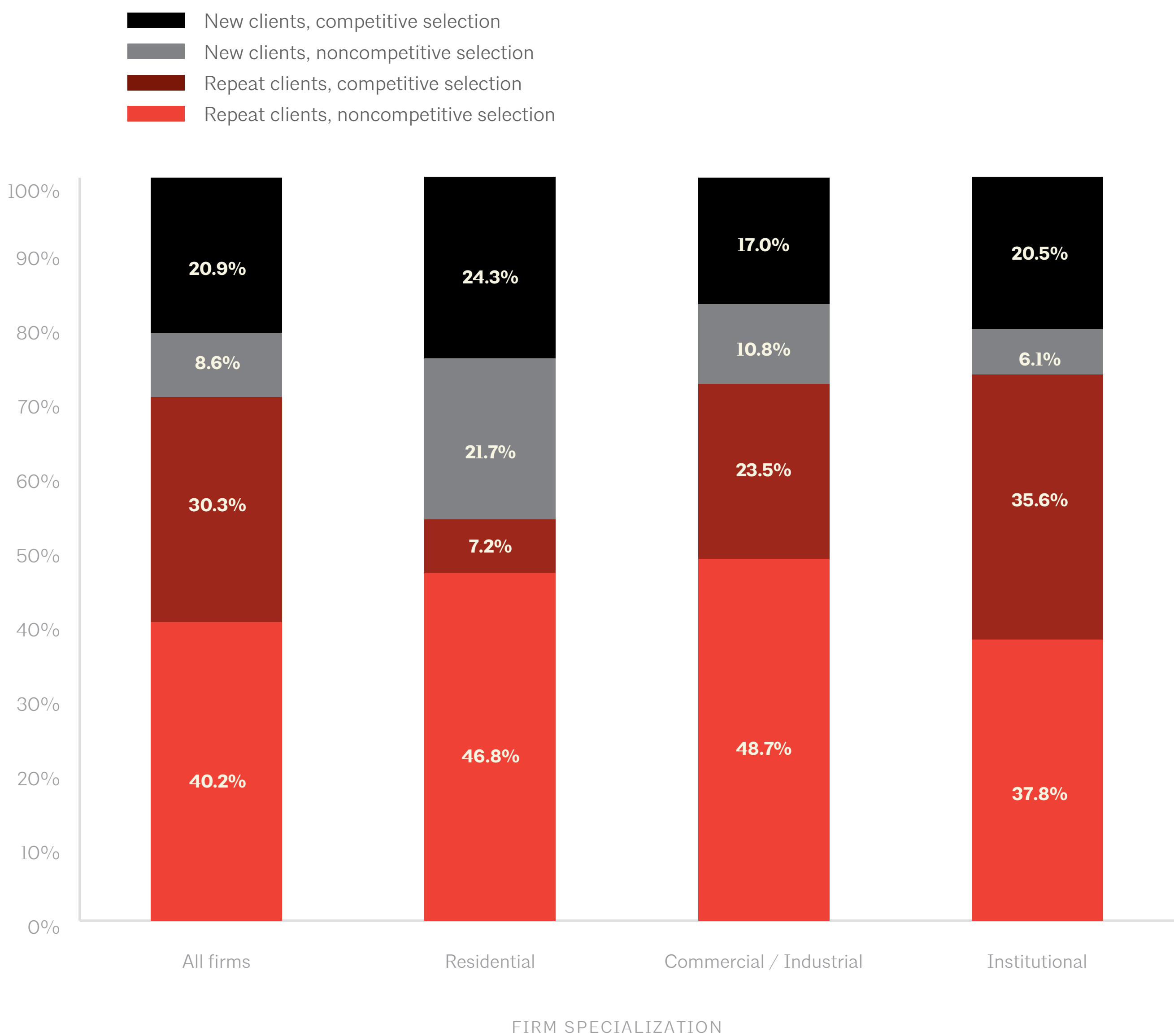


Projects and billing methods

- 84% of gross billings at firms in 2019, on average, were from projects where the firm served as the architect of record, similar to 2017 and 2015.
- While the stipulated sum (fixed fee) billing method remained most popular in 2019 (accounting for 38% of firm billings), billing clients by professional fees plus reimbursable expenses accounted for 32% of firm billings, an increase of four percentage points from 2017. **(FIGURE 3.3)**
  - The share of firm billings billed by the professional fees plus reimbursable expenses method was highest at firms with a commercial/industrial specialization (46% of billings).
  - Smaller firms primarily relied on working at an hourly rate in 2019, with 41% of their billings being derived this way.
- The median backlog of projects among firms was reported as three to six months, which trended higher among firms specializing in institutional work.

FIGURE 3.4: **Architecture firms with a residential specialization have the largest share of billings from new clients**

% of firm billings by work source, 2019



Client types

- Billings derived from state or local government clients continued to trend up (23% overall vs. 21% in 2017) while billings from developers have trended down (17% overall vs. 23% in 2017).
- New clients continued to account for about 30% of firm billings in 2019, with 70% derived from repeat clients. **(FIGURE 3.4)**
  - Firms with a residential specialization reported the largest share of billings from new clients (46%), while firms with an institutional specialization reported the smallest share (27%).
  - Firm billings from noncompetitive selection for clients continued its recent decline, falling from 54% of billings in 2017 to 49% in 2019.
  - Smaller firms reported deriving a larger share of billings from repeat clients, with most being through a noncompetitive selection process.

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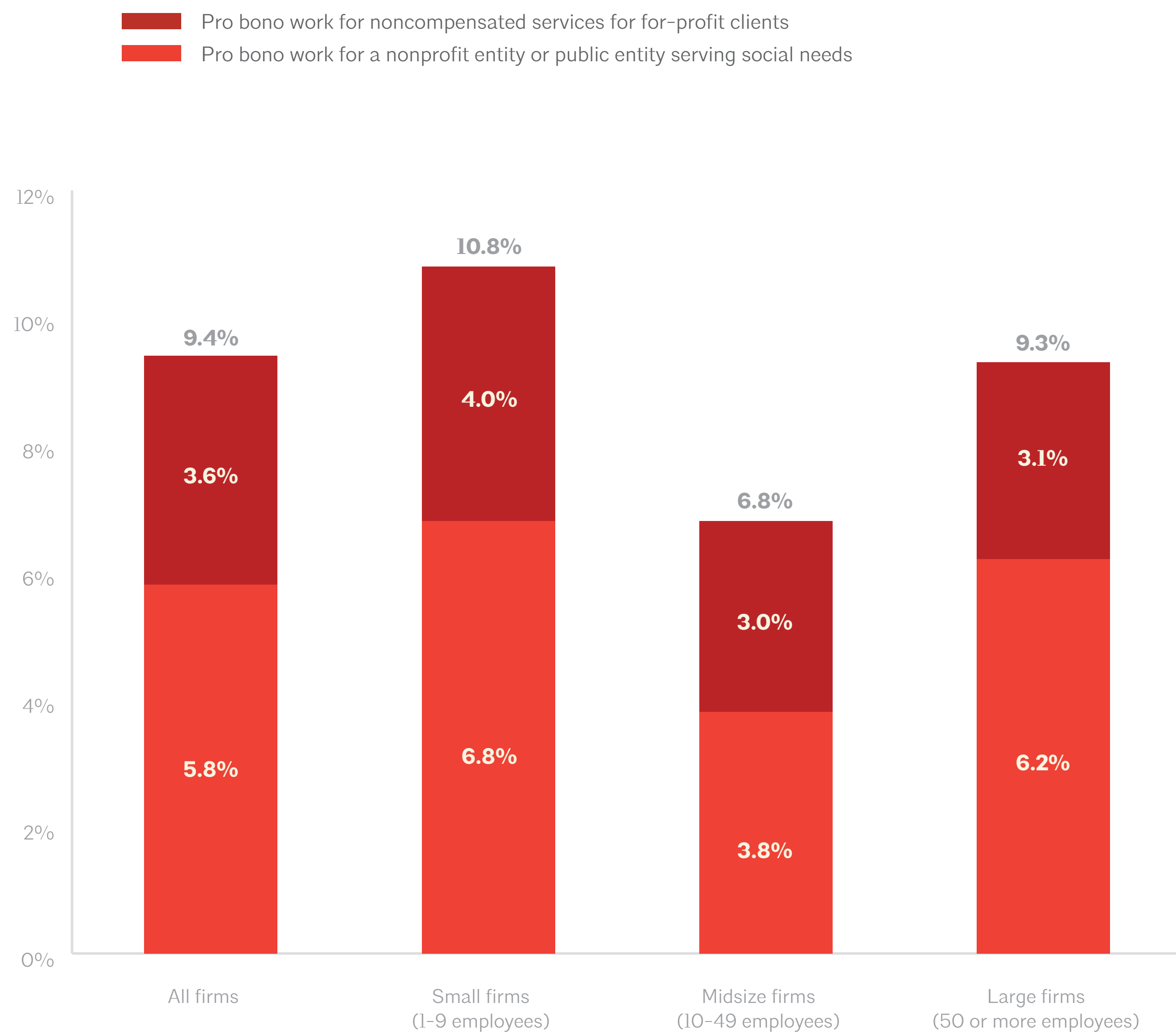
FIGURE 3.5: **Architecture firms devote an average of 9% of their billable hours to pro bono work**

Average percent of billable hours to pro bono work, by type of pro bono work, 2019



Pro bono work

- More than half (52%) of firms reported conducting pro bono work in 2019, a similar proportion to recent years, with larger firms more likely to report conducting pro bono work than smaller firms.
- 6.1% of billable hours at firms that did pro bono work in 2019, on average, went toward pro bono work for nonprofit clients, while 3.8% went toward work for for-profit clients.
  - Small firms typically did less pro bono work in 2019, but tended to devote a larger share of billable hours to it when they did. **(FIGURE 3.5)**

Marketing and business development

- The average share of firm billings going toward staff costs for marketing and business development decreased slightly to 9% in 2019 from 10% in 2017.
- The percentage of net billings allocated toward direct expenses for marketing and business development also decreased to 4% in 2019 from 6% in 2017.

Net worth

- $908,000 was reported as the average net worth of an architecture firm in 2019.
- Firms with an institutional specialization reported the highest net worth, averaging $1,454,000, while firms with a residential specialization averaged $429,000.

Business loans/bad debt

- The average amount of business loans/debt carried by firms in 2019 was $70,000.
- Institutional firms, while having a higher net worth, also reported the highest amount of business loans/debt carried by the firm, averaging $107,000.
- The average amount of bad debt written off by firms decreased to $13,500 in 2019 from $17,000 in 2017.
- Firms with a commercial/industrial specialization wrote off more bad debts than did firms of other specializations in 2019, averaging $18,000.

Contract agreements

- More institutional and commercial/industrial firms use AIA contract documents than do firms of other specializations, which are more likely to use custom internal agreements.

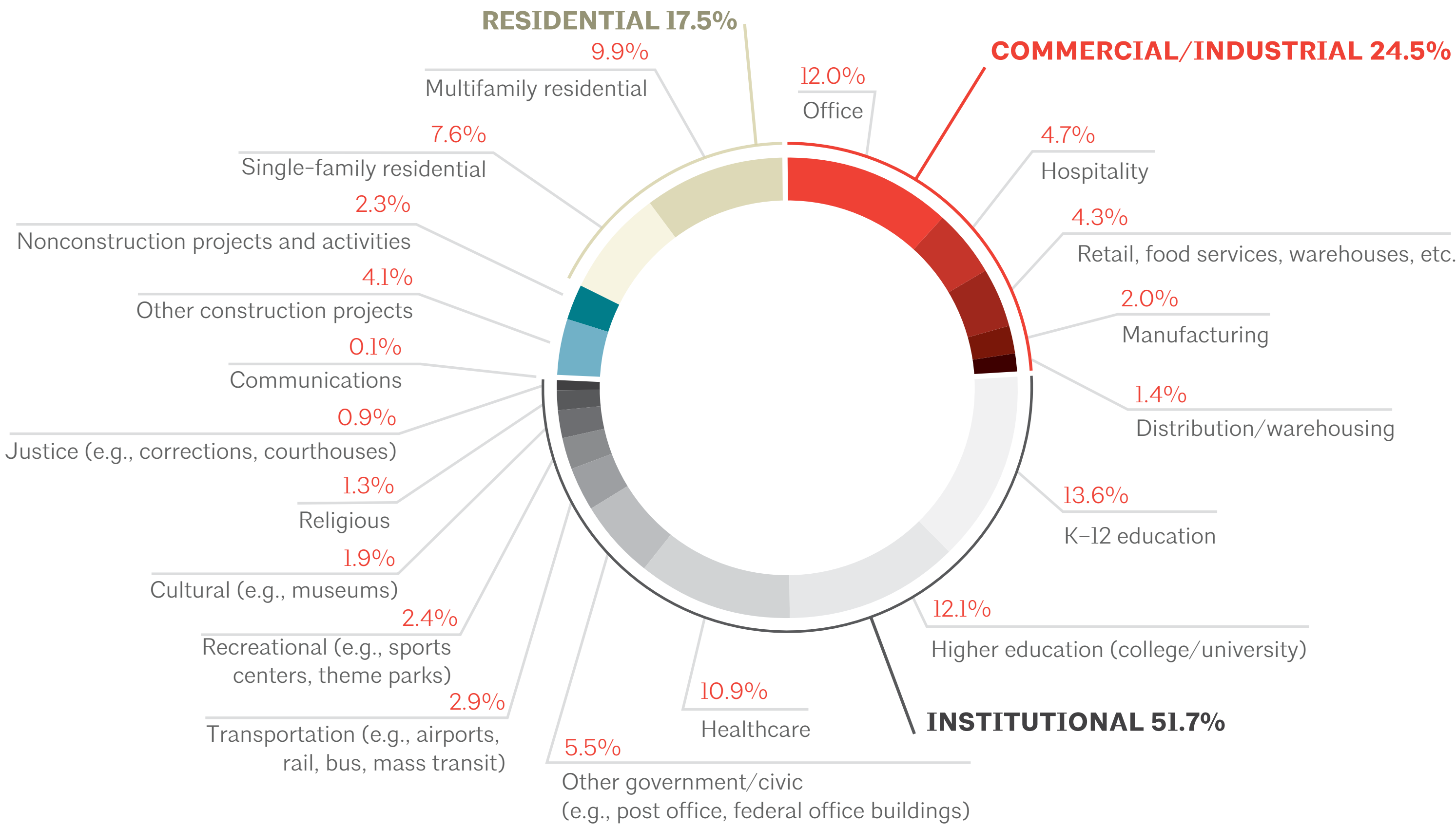
For more detailed data on the topics covered in this chapter, see Appendix tables 2.1–2.19.

Construction sectors served

This chapter overviews the work of architecture firms. Specifically included are findings around billings by sector, construction type, residential projects, resilient and green projects, and post-occupancy evaluation work.

FIGURE 4.1: **More than half of architecture firm billings are from institutional work, primarily education projects**

% of firm billings, 2019



Billings by construction sector

- Architecture firms continued to derive the largest share of their billings from institutional projects in 2019, with just over half of their billings coming from projects in that category (52%). **(FIGURE 4.1)**
- K-12 education projects continued to trend upward and accounted for 14% of all firms' gross billings in 2019, followed by college/university education projects (12%), and office projects (12%).
- The shares of gross billings from both residential and commercial/industrial projects declined from 2017 to 2019, with multifamily residential projects seeing the largest decline.
- Billings by firm specialization: At firms specializing in residential work, 45% of their billings were derived from single-family work and 39% were derived from multifamily work.
- Billings by firm specialization: Commercial/industrial firms' billings were mostly split between office (26%), hospitality (18%), and retail, food services, warehouses, etc. (15%).
- Billings by firm specialization: Institutional firms' billings were primarily derived from K-12 education projects (24%), college/university education projects (20%), and healthcare projects (11%).

FIGURE 4.2: **Firms with an institutional specialization report the largest share of work from renovations and retrofits, versus new construction**

% of firm billings, 2019

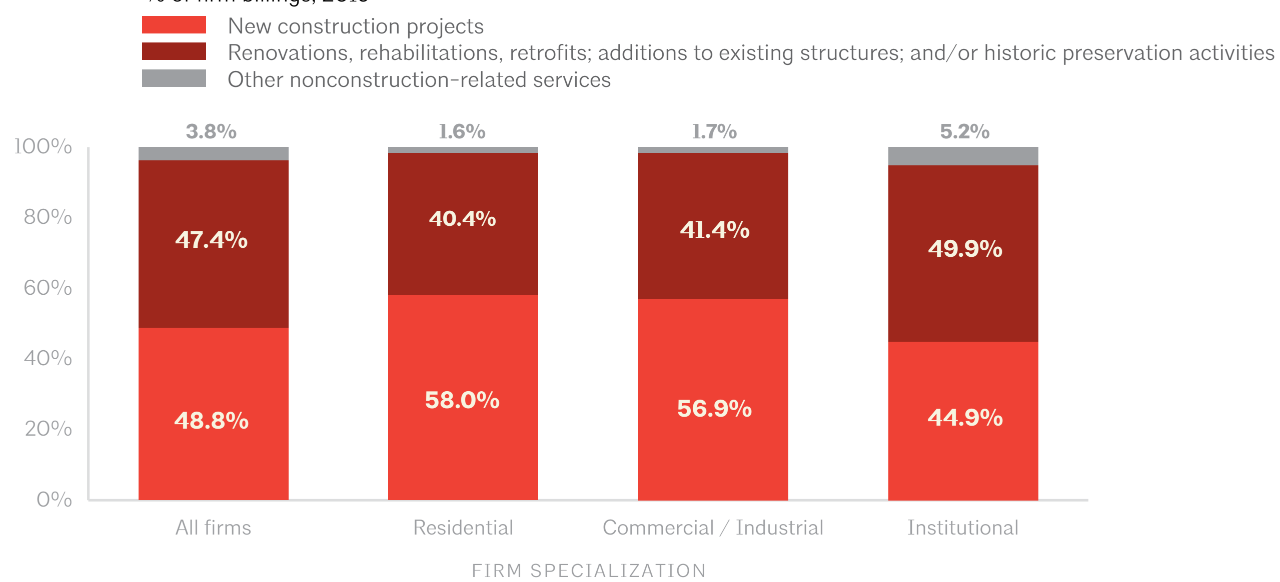
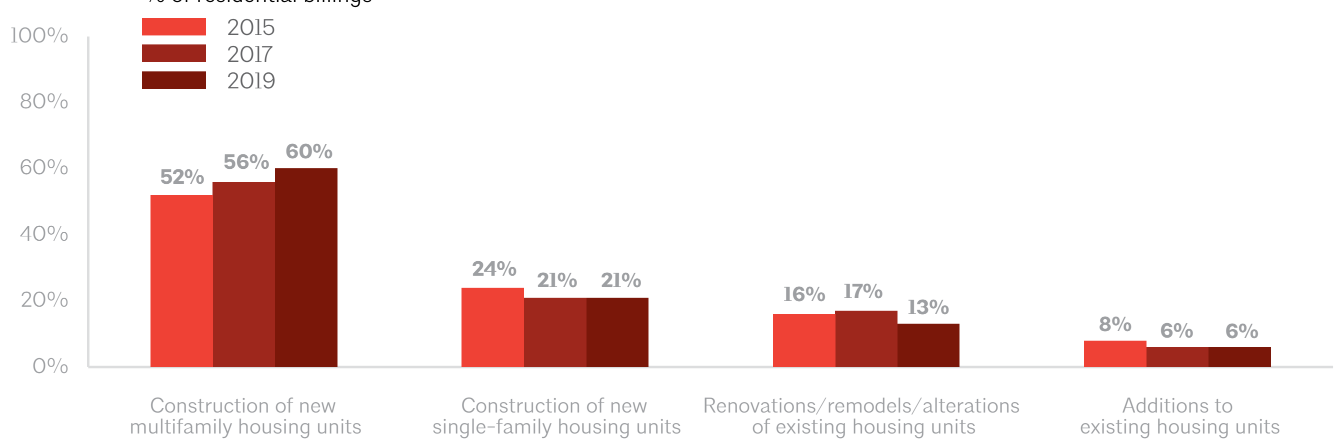


FIGURE 4.3: **Architecture firms continue to see the share of their residential billings from new multifamily housing increase**

% of residential billings



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Construction type

- The share of firm billings from new construction projects decreased to 49% in 2019 from 54% in 2017.
  - The share of firm billings from renovations and additions both increased by two percentage points from 2017 to 2019, rising to 31% and 13% of overall billings, respectively.
  - Firms with a residential specialization reported the largest share of billings from new construction projects (58%).
  - Firms with an institutional specialization reported the largest share of billings from renovations, rehabilitations, retrofits, additions to existing structures, and historic preservation projects (50%). **(FIGURE 4.2)**

Residential projects

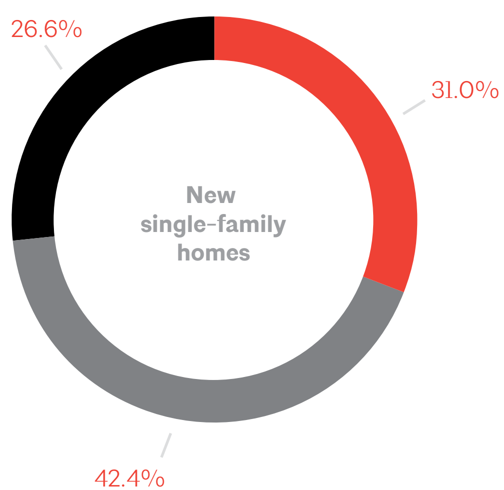
- At firms that had billings from residential projects in 2019, 60% of residential billings were derived from new multifamily housing units, while 21% were from new single-family housing units. **(FIGURE 4.3)**
- The remaining 19% of residential billings were derived from renovations, remodels, and alterations to existing housing units (13%), and additions to existing housing units (6%).
- Larger firms reported deriving a greater share of billings from multifamily projects, while smaller firms did more single-family work, renovations, and additions.

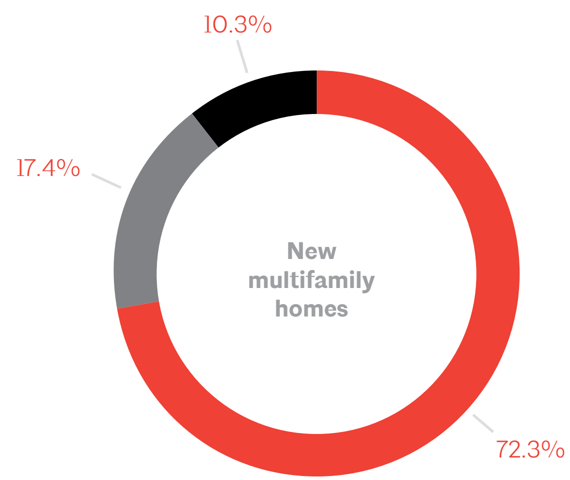
FIGURE 4.4: **Three quarters of new multifamily housing units designed by firms are less than 1,200 square feet**

% of single-family and multifamily housing units by size, of housing units begun in 2019

New single-family homes
- Less than 1,800 square feet
- 1,800 to 3,999 square feet
- 4,000 square feet or more

New multifamily homes
- Less than 1,200 square feet
- 1,200 to 1,799 square feet
- 1,800 square feet or more





- The mean number of single-family housing units started at firms that began work on residential projects in 2019 was 7.8, multifamily was 62.7, and additions/renovations was 17.8.
- 42% of single-family housing units started in 2019 were from 1,800 to 3,999 square feet, while 72% of new multifamily units started were less than 1,200 square feet. **(FIGURE 4.4)**

Resilient and green projects

- More than a third (36%) of firms' construction contract value for residential projects in 2019, and 29% of firms' construction contract value for nonresidential projects, was from buildings designed with qualities of resilience above code minimum.
- Firms also reported that 25% of their construction contract value for residential projects in 2019 was from buildings designed to meet or exceed a performance/sustainability/health rating standard (e.g., LEED, WELL, RELi), as was 23% of their construction contract value for nonresidential projects.

Post-occupancy evaluations

- Overall, just 14% of firms reported that they conducted post-occupancy evaluations (POEs) in 2019.
  - POEs were conducted 25% of the time, on average, which was highest for firms with a residential specialization (40%).
  - POEs most frequently consisted of contacting the owner to see how things are going and surveying building occupants on satisfaction.

For more detailed data on the topics covered in this chapter, see Appendix tables 3.1–3.12.

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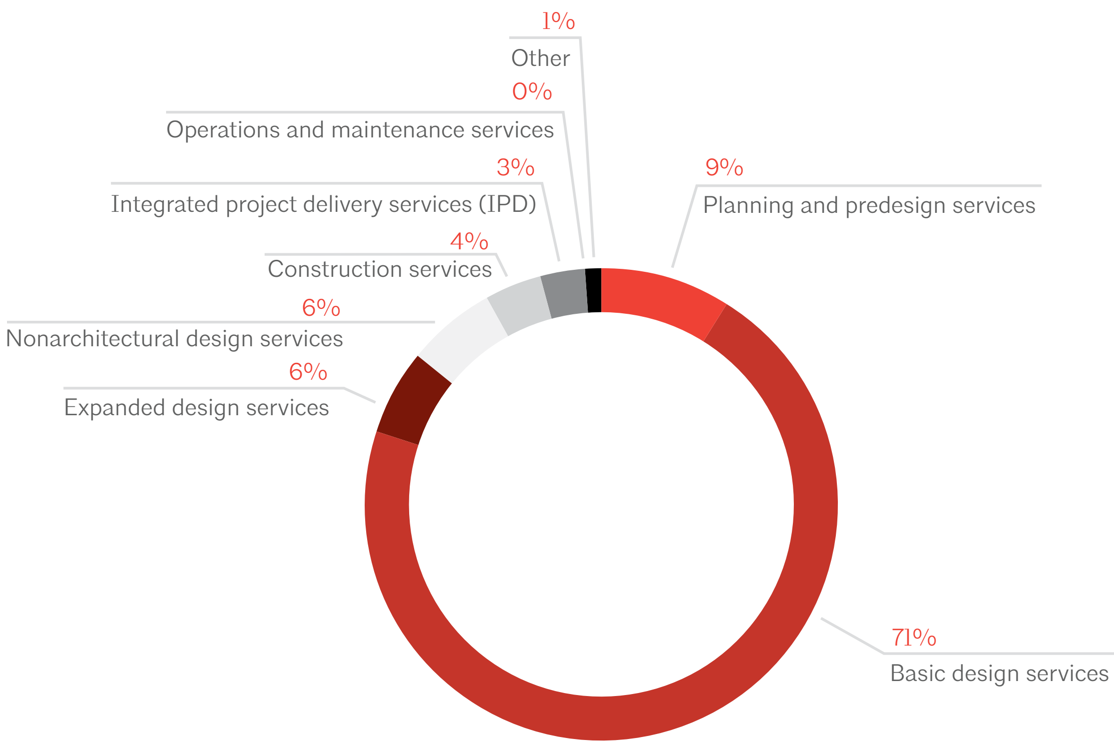
Practice and technology trends

This chapter outlines the key findings related to practice and technology trends, including services and methods, research, BIM, and technology and software.

FIGURE 5.1: **Basic design services dominance increases as the top source of gross billings**

% of firm billings

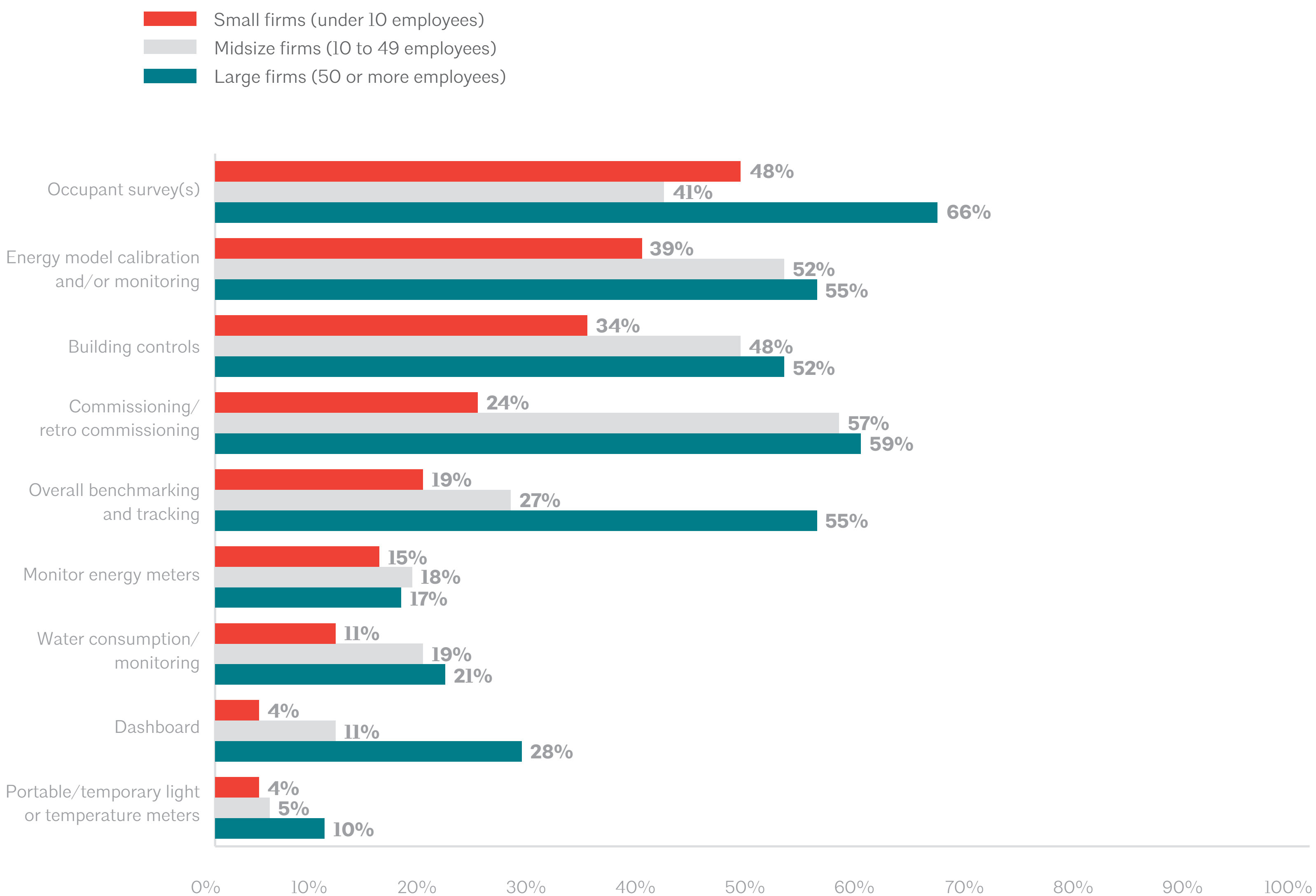


Services

- Basic design services continued to dominate as a top source of gross billings in 2019 (71%), a six-percentage-point increase from 2017. **(FIGURE 5.1)**

FIGURE 5.2: **Large and mid-sized firms use a multitude of performance evaluation methods**

Methods used to monitor/evaluate actual building performance, % of firms



Performance evaluation methods

- Out of firms with gross billings from operations and maintenance services, building performance is typically monitored via an occupant survey (48%) or energy model calibration/monitoring (44%).
  - Firms with an institutional specialization were more likely to report using commissioning/retro commissioning to evaluate building performance (59%) than other firms.
  - Large and midsize firms reported using a multitude of performance evaluation methods, with 40% or more using occupant surveys, energy model calibration/ monitoring, building controls, and commissioning/retro commissioning. **(FIGURE 5.2)**

Project delivery methods

- Traditional design-bid-build continued to dominate as a top delivery method, even with the nine-percentage-point decrease in share of billings from 2017 to 59%.
- Alternatively, construction manager as constructor increased by eight percentage points from 2017 to account for 19% of billings overall in 2019.

Design charettes

- Design charettes are the most frequently incorporated practice in firms' 2019 projects (46%) followed by standard/ documented project delivery processes (33%).
- Nearly all firms with 50 or more employees reported incorporating design charettes into their 2019 projects (95%) compared with 33% of firms with fewer than 10 employees.

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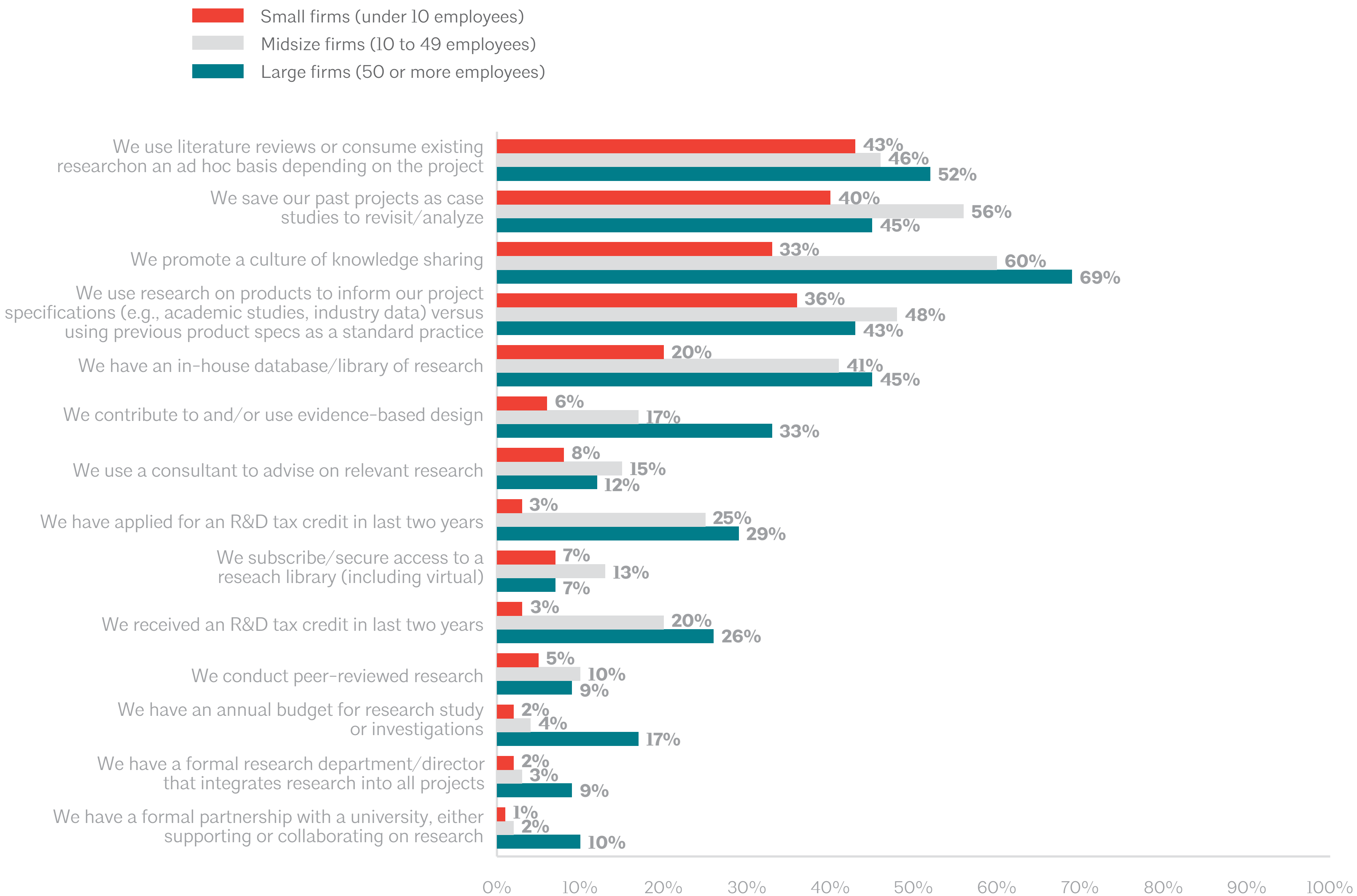
FIGURE 5.3: **Integration of research into practice varies widely by size of firm, but overall more firms are activley engaging in practice-relevant research**

% of firms

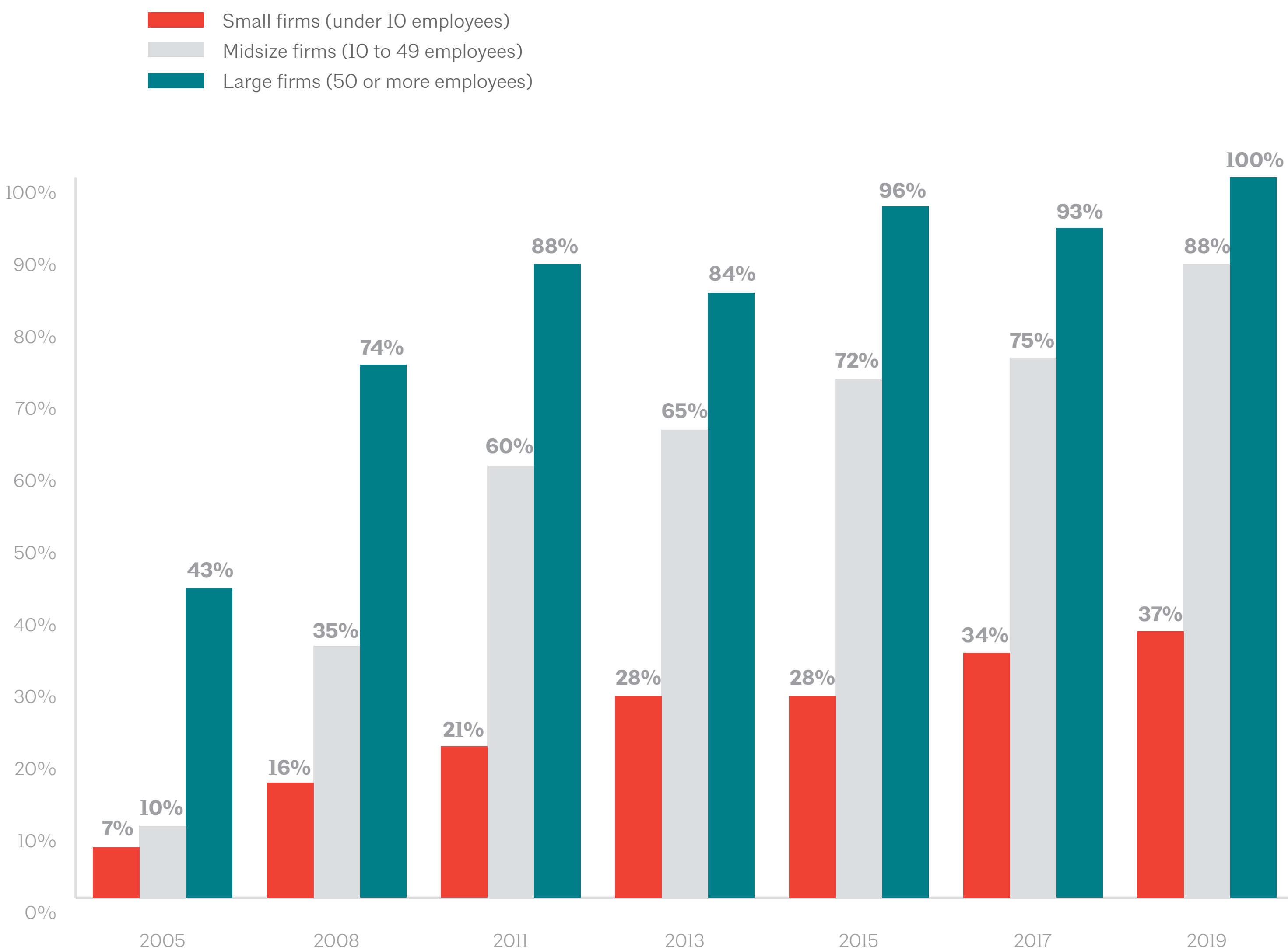


Research

- Nearly three quarters (72%) of firms were actively engaging in practice-relevant research in 2019, up six percentage points from 2017.
  - While integration varies widely by firm size, literature reviews (44%), case studies (43%), and promoting a culture of knowledge sharing (40%) were the most commonly cited research engagement occurring in firms. **(FIGURE 5.3)**
- Nearly all firms that applied for a Research & Development tax credit within the last two years received one (84%), only a slight decrease from 2017.
  - Overall, 8% of firms (including 26% of larger firms with 50 or more employees) received an R&D tax credit in 2019.
  - R&D tax credits decreased almost 30% to $68,000 on average in 2019 from $96,000 in 2017 as the share of firms that applied for and received an R&D tax credit both increased.
  - Firms specializing in institutional work received the largest R&D tax credits in 2019.

FIGURE 5.4: **Share of firms using BIM for billable projects continued to expand, with all large firms now all using it**

% of firms

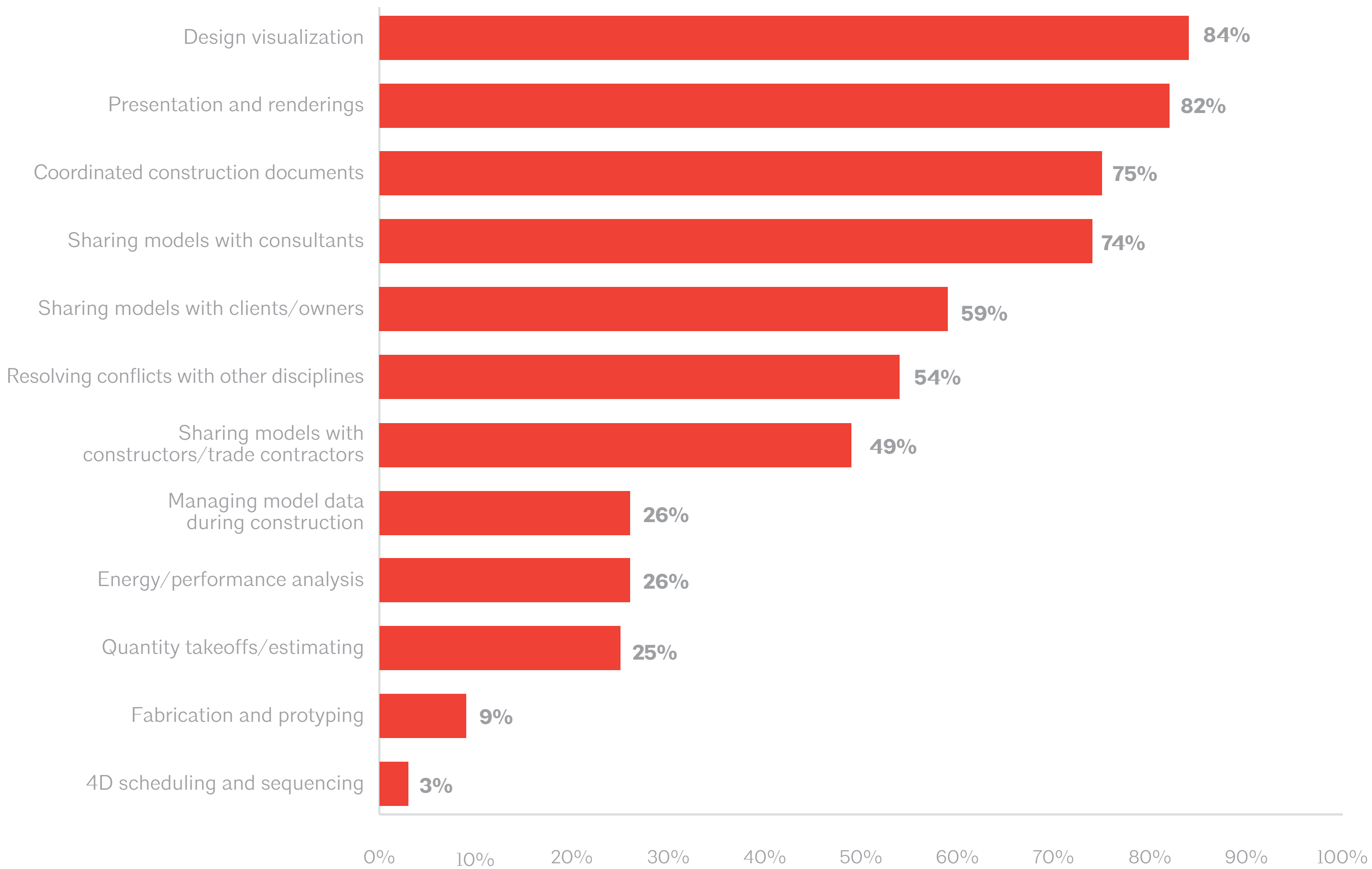


BIM

- The overall share of firms using BIM software in some capacity continued to increase in 2019, rising to 58% of firms, with 51% using it for billable work and 7% using it for non-billable work.
  - Only 20% of firms do not use BIM software and do not plan to acquire it, a decrease of six percentage points from 2017.
  - Even broken out by firm size, the share of firms using BIM software continued to expand, with 100% of large firms and 37% of small firms using BIM for billable work in 2019.
  - Midsize firms had the largest percentage point increase in the share of firms using BIM software for billable work from 2017 to 2019 (13 percentage points).
  - BIM software was used more frequently by institutional firms (66%) and least frequently by residential firms (39%) for billable work in 2019. **(FIGURE 5.4)**

FIGURE 5.5: **Design visualization continues to be a top use of BIM while sharing models with clients becomes more popular**

% of firms using BIM for billable work



- On average, firms that used BIM software for billable work used it heavily, with 76% of their revenue coming from projects using BIM in 2019, a five-percentage-point increase from 2017.
  - 35% of the firms that used BIM software for billable work in 2019 got 100% of their revenue from projects that used it.
- More firms reported starting to use BIM software to share models with consultants (74%), an increase of five percentage points from 2017 while the most frequently cited use, design visualization (84%), decreased four percentage points from 2017. **(FIGURE 5.5)**

FIGURE 5.6: A greater share of larger firms are using energy modeling on projects

% of firms

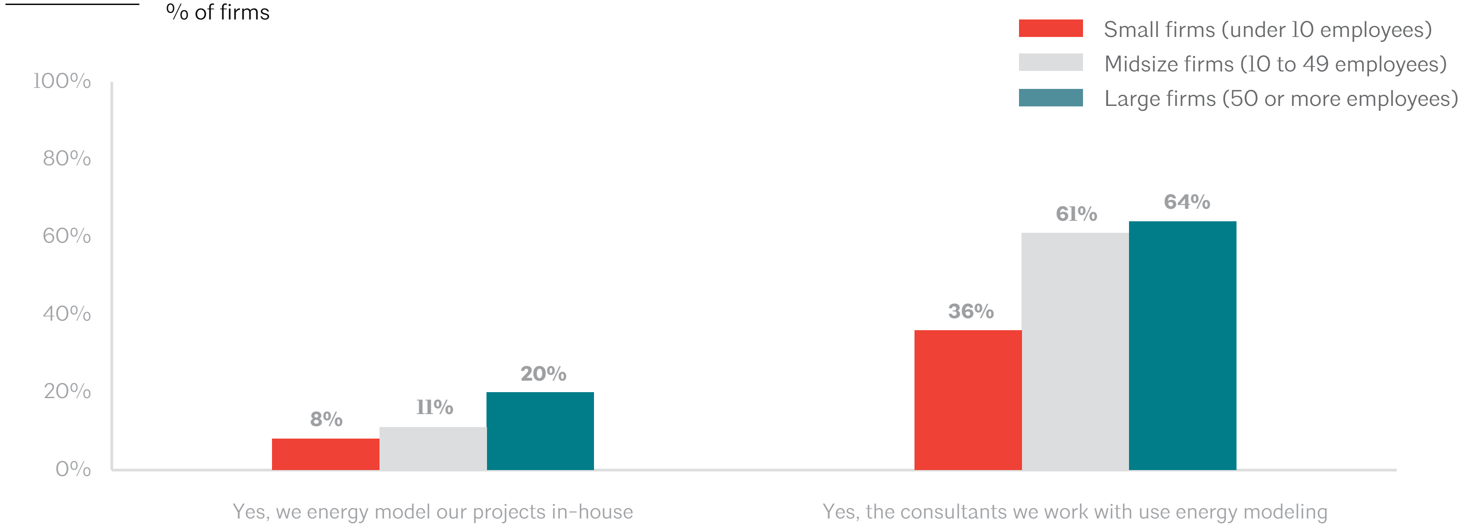
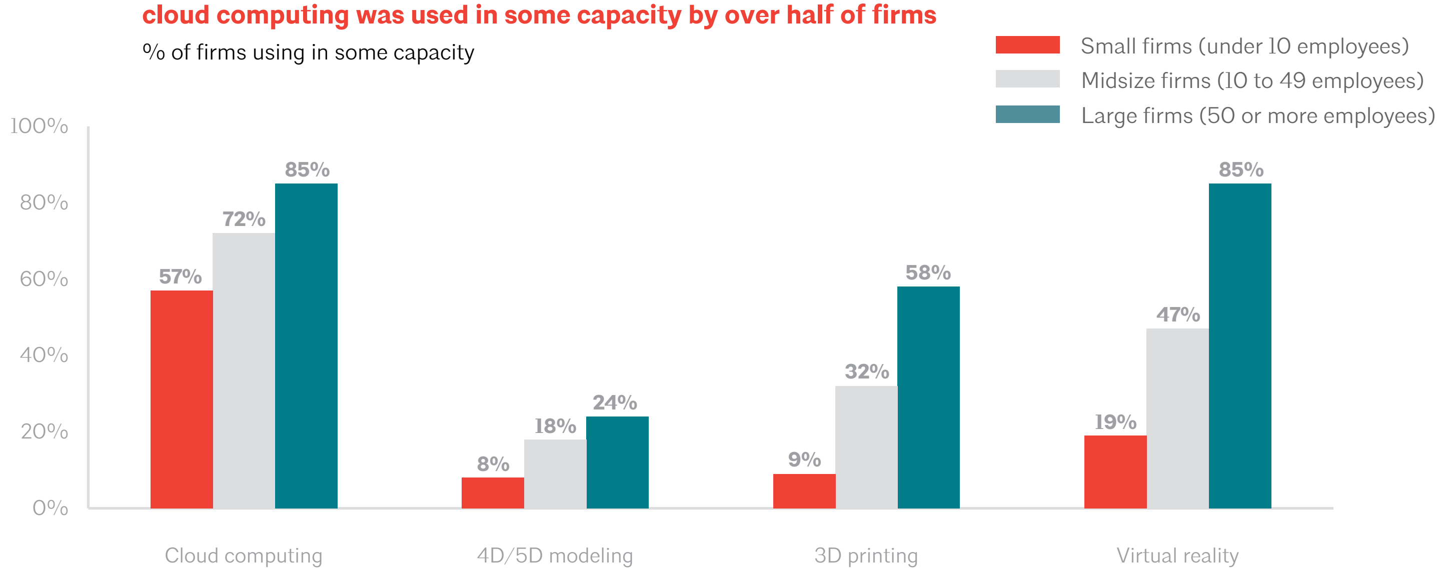


FIGURE 5.7: Larger firms are adapting a variety of technology into their projects; cloud computing was used in some capacity by over half of firms

% of firms using in some capacity



Technology and software

- Half (51%) of firms reported using energy modeling software in 2019, although the majority used it through consultants (42%), compared with using it in-house (9%).
  - Large firms were most likely to report using energy modeling on projects either in-house or through consultants (84%), compared with small firms (44%). **(FIGURE 5.6)**
  - On average, the share of revenue coming from projects using energy modeling increased slightly from 28% in 2017 to 31% in 2019.
  - Firms with 100 or more employees saw the greatest percent of their revenue come from projects using energy modeling software, at an average of 63% in 2019.
- Use of technology in projects: 61% of firms reported using cloud computing in some capacity in 2019. **(FIGURE 5.7)**
- Use of technology in projects: 3D printing and virtual reality were used by over half of large firms in some capacity in 2019, in comparison to less than 20% of small firms.

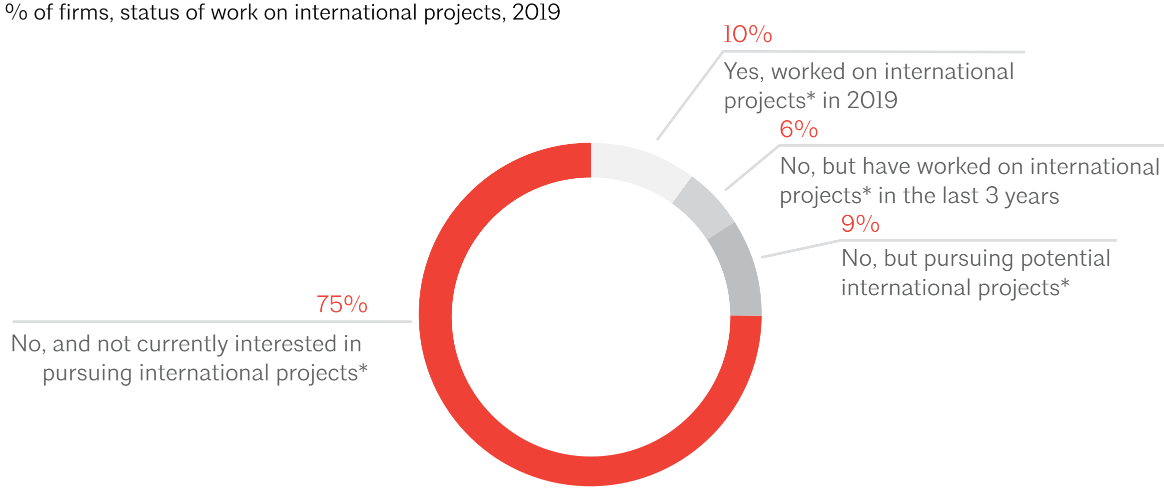
For more detailed data on the topics covered in this chapter, see Appendix tables 4.1–4.12.

International work

This chapter overviews the key findings related to the international work of architecture firms in the United States.

FIGURE 6.1: **One in 10 architecture firms worked on international projects in 2019**

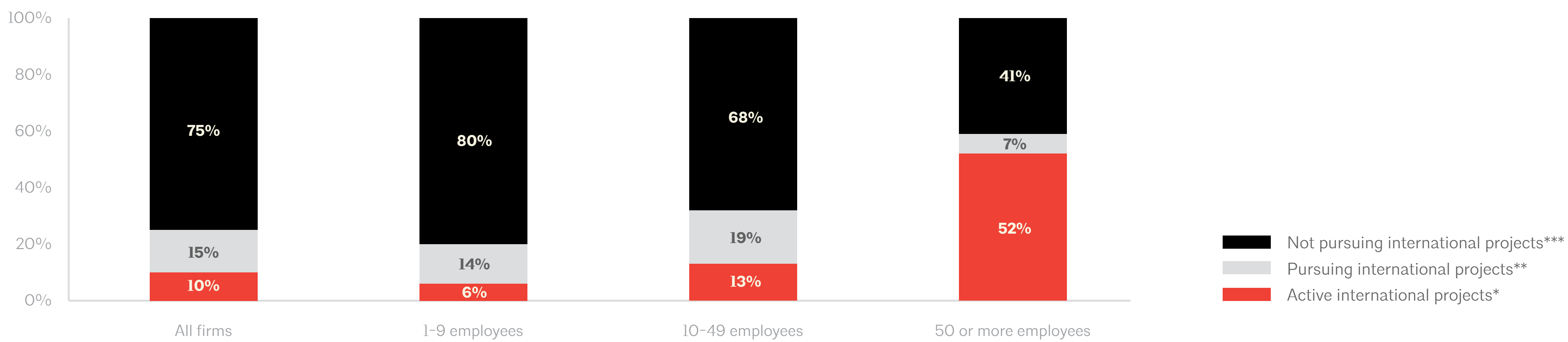
% of firms, status of work on international projects, 2019



* International projects are defined as projects built outside the US and/or inside the US for international clients

FIGURE 6.2: **More than half of large firms had active international projects in 2019**

% of firms, status of work on international projects, 2019



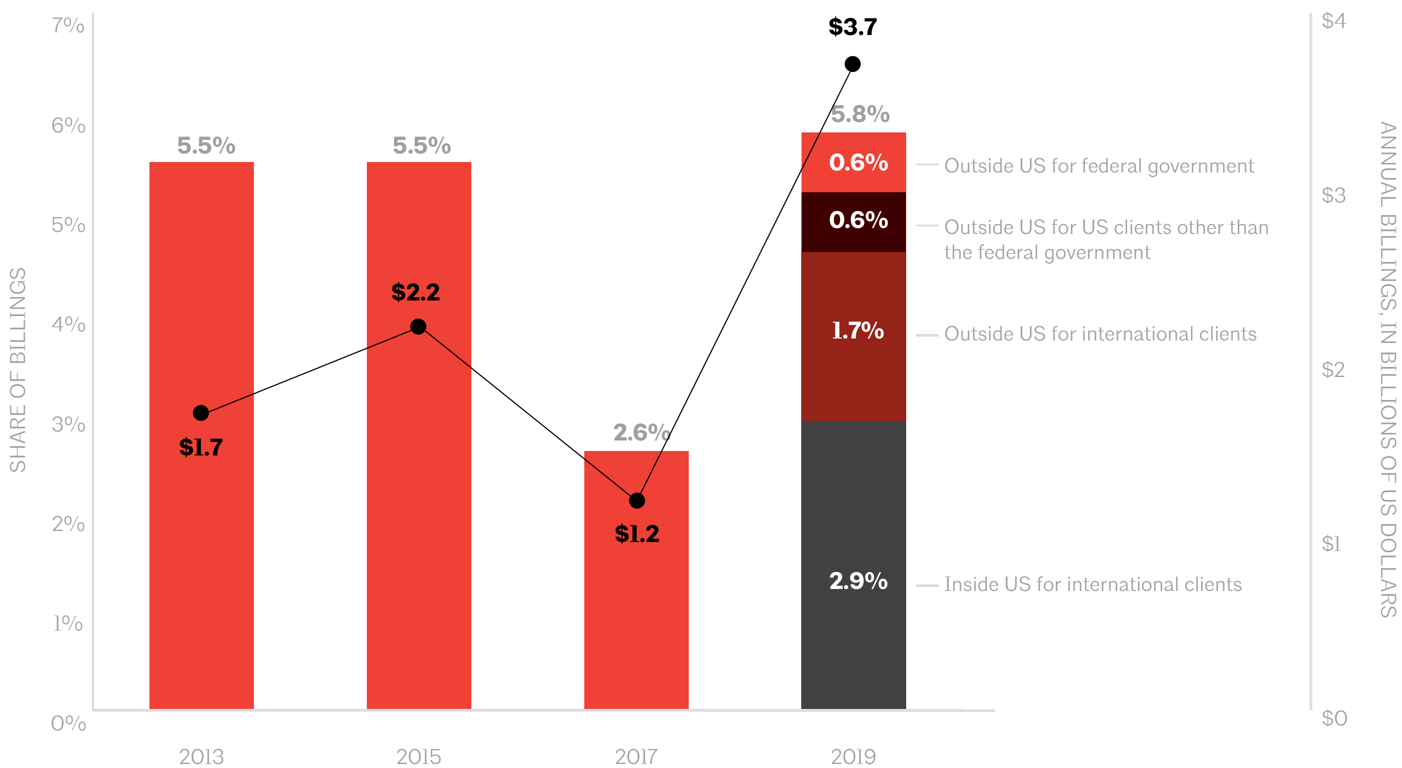
* Firm worked on international projects (projects built outside the US and/or inside the US for international clients) in 2019
** Firm has worked on international projects in the last three years or is pursuing potential international projects
*** Firm is not currently interested in pursuing international projects

Architecture firm engagement with international projects

- International work was conducted by 10% of firms in 2019, a similar share of firms as in recent years. **(FIGURE 6.1)**
- 52% of large firms reported that they worked on international projects, in contrast to just 13% of midsize firms, and 6% of small firms. **(FIGURE 6.2)**
- 83% of firms that did international work in 2019 derived gross billings from these projects, a modest uptick (77%) from 2017.

FIGURE 6.3: **2019 architecture firm billings from international work reached nearly $4 billion**

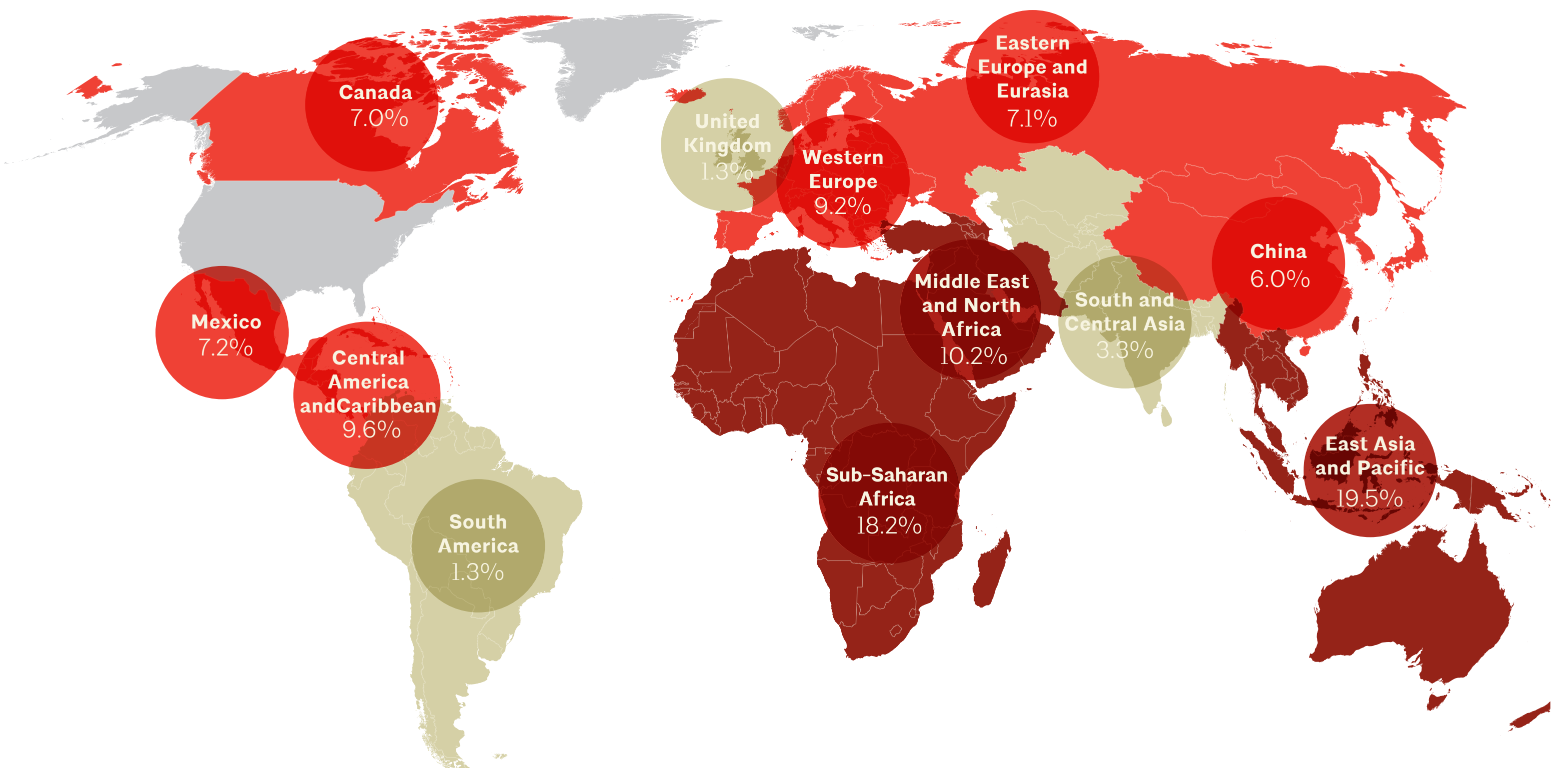
% of total gross firm billings nationally derived from international projects, for given year; billings in billions of US dollars



- International work accounted for an average of 5.8% of gross billings at firms with international work in 2019, totaling $3.7 billion.
  - Projects inside the US for international clients accounted for the largest share of gross billings derived from international projects (2.9% of gross billings).
  - Firms with fewer than 100 employees were more likely to report a larger share of their international billings from projects outside the US for international clients (2.5%) than were larger firms (1.6%). **(FIGURE 6.3)**

FIGURE 6.4: **Projects located in East Asia and the Pacific, Africa, and the Middle East accounted for nearly half of 2019 international billings**

% of 2019 gross billings from international projects outside the US, by region



Regions of the world with international work

- East Asia and Pacific was the top region for international gross billings derived from projects outside the US in 2019 (19% of gross billings from international projects outside the US), followed by Sub-Saharan Africa (18%). **(FIGURE 6.4)**
- The trend of a larger portion of international gross billings being derived out of a US office (86%) as opposed to a foreign office (14%) continued in 2019.
- While 84% of firms have no permanent offices outside of the US; China (4% of firms have permanent offices in the country); the Middle East/North Africa (4%); and the United Kingdom (4%) are the top locations for firms that do have permanent foreign offices.
- 60% of firms with international projects in the last three years reported that they teamed up with in-country partners at least some of the time.

Differences between international and domestic projects

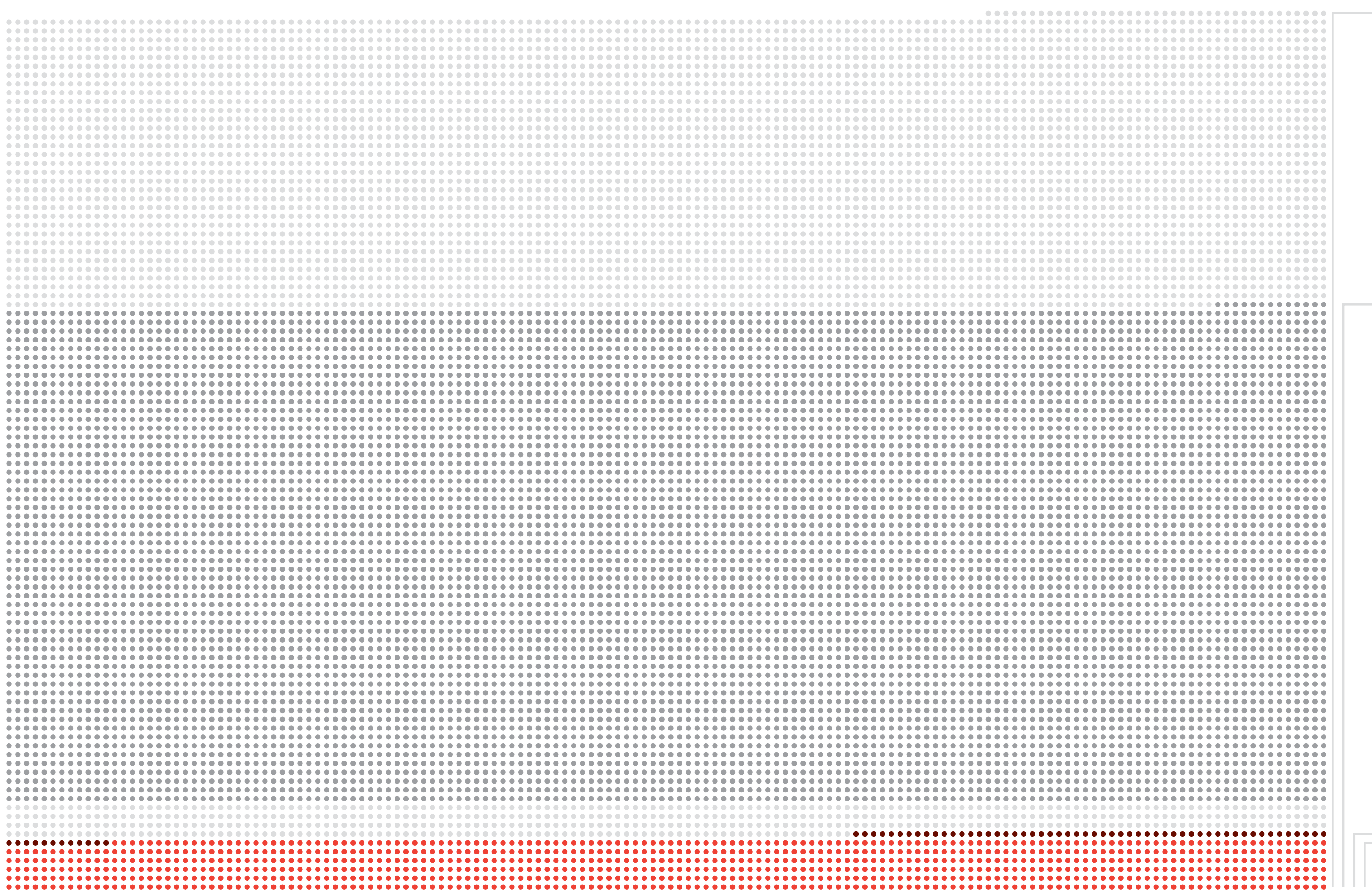
- Schematic design (provided by 85% of firms on international projects), predesign/specialty consulting (76%), and design development (73%) were the most frequently cited services provided by firms on international projects in 2019.
- A modestly larger portion of respondents reported more problems after award for international projects than in past years (21% in 2019 vs. 17% in 2017).
- 34% of commercial/industrial firms reported more issues on international projects regarding construction account aging than firms of other specializations in 2019.
- Firms also reported that there was a drop in profitability and an increase in marketing costs for international projects in 2019.

For more detailed data on the topics covered in this chapter, see Appendix tables 5.1–5.9.

Methodology

FIGURE A.1: **Invited and responding firms**

Number of firms



Background

The AIA has surveyed architecture firms since 1979 as part of a commitment to better track firm demographics and business practices of the profession. Last conducted in 2018, the 2020 Firm Survey examines many of the issues previously explored.

Survey content was developed by AIA staff and volunteer leaders. Sampling, data collection, and tabulation were handled with the assistance of The Farnsworth Group, an independent research company.

Sample composition

AIA sent The Farnsworth Group a list of 14,889 contacts to be de-duplicated based on firm name, email address, respondent name, street address, AIA member number, phone number, and street address in order to prevent duplicate responses from the same firm. After the list was de-duplicated, the survey was distributed to representatives of 9,613 unique firms. **(FIGURE A.1)**

Data collection

On March 23, 2020, AIA sent an initial email (in the name of AIA's president) to the survey sample. The email invited them to participate in the survey by visiting their unique URL on a website hosted by The Farnsworth Group. As an incentive to participate, respondents were told in the email invitation that as participants, they would receive a copy of the full survey report. Several reminder emails were sent to nonrespondents throughout April and May.

FIGURE A.2: **Universe of AIA member firms and survey response by firm size**
% and number of firms

Number of employees	Estimated universe		Unweighted responses	
1 employee	5,171	27%	180	20%
2–4 employees	6,447	33%	215	24%
5–9 employees	2,890	15%	203	23%
10–19 employees	2,032	11%	240	16%
20–49 employees	1,535	8%	108	12%
50–99 employees	765	4%	26	3%
100+ employees	456	2%	16	2%
TOTAL	19,296	100%	888	100%

The survey was closed for tabulation on May 19, 2020, with a total of 954 submitted returns. Returns were cleaned and deleted if they did not meet certain validity criteria. The click rate was roughly 26%, as 2,485 respondents were directed to the survey using the provided link. The participation rate was 38%, as 954 firms completed the survey with only 934 qualifying. Of the 934 firms that qualified, 888 records were used after filtering out invalid responses.

Sample representativeness and weighting

To represent all US firms more accurately, most survey data is weighted to restore correct proportionality by size. Compared with AIA's estimate of how offices distribute by size (number of employees) in the universe of all AIA member-owned firms, the unweighted survey responses somewhat underrepresent the smallest firms (under five employees), while somewhat overrepresenting midsize firms (5–19 employees). **(FIGURE A.2)**

Appendix

Table 1.1

Which one option best describes your firm (including all offices)?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Architecture: single-discipline firm	51%	50%	55%	66%	65%	58%	38%	24%	8%	13%	65%	52%	49%	36%
Architecture: multidisciplinary (with one or more additional design disciplines such as interior design or engineering)	42%	42%	39%	26%	27%	37%	61%	69%	85%	81%	29%	42%	48%	40%
Consulting	2%	3%	2%	3%	3%	1%	1%	0%	0%	0%	2%	1%	1%	8%
Design/build	2%	2%	2%	2%	2%	1%	0%	2%	4%	0%	4%	1%	1%	0%
Interior design: with one or more additional disciplines, including architecture	1%	1%	1%	0%	1%	0%	1%	1%	4%	0%	0%	3%	0%	0%
Engineering: with one or more additional disciplines, including architecture	0%	0%	0%	0%	0%	0%	0%	1%	0%	6%	0%	0%	0%	0%
Planning: with one or more additional disciplines, including architecture	0%	1%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	4%
Other	1%	2%	1%	2%	1%	1%	0%	2%	0%	0%	1%	1%	1%	11%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.2

Which design-related disciplines or specialties does your firm offer?

Percent of firms-multiple response permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Architecture	98%	98%	99%	99%	98%	99%	99%	99%	96%	100%	99%	98%	100%	96%
Interior design	60%	60%	58%	38%	51%	68%	76%	84%	89%	100%	48%	65%	67%	43%
Zoning/code compliance	58%	57%	54%	55%	55%	55%	59%	48%	35%	50%	51%	53%	53%	60%
Predesign services[1]	56%	57%	53%	47%	46%	56%	62%	74%	69%	75%	45%	52%	65%	47%
Planning	53%	51%	45%	32%	41%	49%	56%	61%	69%	81%	34%	46%	55%	40%
Sustainable design	41%	38%	35%	28%	26%	35%	46%	56%	65%	75%	31%	29%	46%	31%
Test fits/space planning	33%	34%	35%	20%	30%	40%	49%	61%	58%	63%	18%	54%	46%	17%
Historic preservation	33%	31%	31%	22%	34%	37%	36%	39%	23%	31%	27%	29%	35%	24%
Pro bono/public interest design	33%	33%	27%	23%	25%	32%	29%	39%	19%	38%	24%	23%	31%	25%
Cost estimating	21%	19%	18%	13%	14%	23%	24%	27%	12%	31%	13%	17%	24%	11%
Design/build	22%	19%	17%	14%	12%	22%	22%	19%	31%	31%	10%	21%	21%	15%
Construction management	20%	19%	16%	19%	17%	16%	10%	15%	8%	38%	15%	20%	14%	25%
Expert witness	13%	15%	15%	16%	17%	14%	12%	13%	8%	13%	13%	13%	16%	18%
Graphic design	19%	16%	15%	9%	9%	17%	16%	28%	35%	56%	9%	15%	19%	15%
Urban planning/design	20%	19%	13%	7%	9%	13%	25%	24%	12%	56%	11%	9%	15%	18%
Capital needs assesments	13%	12%	12%	8%	8%	14%	18%	21%	23%	38%	5%	12%	23%	15%
Forensic architecture/damage assessment	11%	10%	11%	11%	11%	12%	9%	12%	0%	19%	6%	9%	14%	21%
Landscape architecture	11%	11%	10%	9%	7%	6%	10%	17%	12%	56%	8%	9%	9%	11%
Sustainability certification and verification	12%	10%	9%	5%	4%	10%	14%	22%	27%	38%	4%	8%	18%	1%
Program management	11%	10%	9%	7%	6%	11%	11%	15%	15%	19%	3%	13%	15%	10%
Structural engineering	8%	8%	8%	9%	6%	5%	5%	12%	12%	25%	10%	6%	6%	4%
Specialty consulting[2]	8%	7%	6%	6%	6%	5%	9%	7%	12%	6%	3%	6%	7%	11%
Energy modeling	8%	7%	5%	4%	4%	4%	6%	6%	12%	31%	5%	3%	7%	4%
M/E/P engineering	6%	6%	5%	4%	4%	4%	5%	7%	12%	31%	4%	4%	6%	1%
Practice-based research[3]	7%	6%	5%	2%	2%	7%	6%	9%	19%	31%	2%	4%	11%	6%
Building commissioning	4%	3%	2%	2%	1%	2%	4%	2%	8%	13%	0%	1%	4%	0%
Other	6%	8%	7%	11%	6%	4%	8%	7%	0%	6%	4%	5%	9%	21%

[1] e.g., programming, master planning, strategic planning, site selection

[2] excluding architects, engineers, interior designers

[3] e.g., evidence-based design

Table 1.3

In what year was your firm founded?

Percent of firms

*2015-2018

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
2015-2020	n/a	4%*	7%	11%	11%	4%	1%	0%	0%	0%	12%	8%	2%	12%
2010-2014	17%	16%	14%	23%	14%	13%	7%	6%	0%	8%	18%	11%	12%	8%
2005-2009	14%	13%	13%	16%	16%	11%	8%	9%	0%	0%	16%	14%	7%	17%
2000-2004	12%	13%	12%	16%	15%	7%	14%	10%	0%	0%	16%	12%	9%	12%
1995-1999	12%	11%	12%	10%	12%	15%	18%	15%	9%	0%	12%	10%	14%	8%
1990-1994	10%	10%	12%	8%	15%	15%	8%	15%	14%	0%	10%	14%	15%	9%
1985-1989	10%	10%	10%	9%	7%	14%	11%	10%	14%	8%	10%	11%	8%	19%
1980-1984	7%	7%	5%	4%	4%	7%	8%	9%	5%	0%	3%	7%	7%	4%
1970-1979	8%	8%	6%	3%	2%	7%	10%	13%	23%	31%	2%	7%	9%	4%
1960-1969	4%	3%	3%	0%	1%	1%	10%	4%	14%	8%	1%	3%	4%	6%
1950-1959	2%	2%	2%	0%	2%	3%	4%	4%	9%	0%	0%	2%	6%	0%
1900-1949	2%	2%	2%	0%	0%	2%	3%	4%	9%	38%	0%	0%	5%	0%
Before 1900	1%	1%	1%	0%	0%	0%	0%	4%	5%	8%	0%	0%	2%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average year founded	**1994**	**1994**	**1996**	**2003**	**2000**	**1994**	**1989**	**1989**	**1976**	**1958**	**2001**	**1996**	**1989**	**1998**

Some data may not add to total due to decimal rounding.

Table 1.4

Which option most closely matches your firm's legal structure?

Percent of firms

				Firm size (number of employees at office) (2019)							Firm specialization (2019)			
	All firms 2015	All firms 2017	All firms 2019	1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
S Corporation	27%	29%	35%	17%	38%	46%	45%	51%	27%	47%	30%	39%	39%	32%
Limited Liability Company (LLC)	20%	20%	21%	23%	24%	21%	17%	16%	19%	0%	26%	23%	15%	15%
Sole proprietorship	22%	22%	18%	44%	13%	7%	4%	2%	0%	0%	24%	15%	11%	28%
Professional Corporation (PC)	10%	9%	10%	4%	10%	11%	15%	13%	27%	0%	9%	8%	14%	3%
Professional Limited Liability Company (PLLC)	7%	6%	6%	8%	6%	6%	6%	4%	4%	0%	5%	5%	7%	15%
Partnership	3%	3%	3%	1%	5%	4%	2%	6%	4%	0%	3%	6%	3%	0%
Employee-owned general business corporation (Inc.)	0%	0%	2%	1%	1%	1%	5%	4%	12%	20%	1%	2%	5%	3%
Limited Liability Partnership (LLP)	2%	2%	2%	1%	2%	1%	3%	3%	4%	13%	1%	0%	3%	1%
Other	1%	2%	2%	1%	2%	1%	3%	2%	4%	20%	0%	2%	4%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 1.5

Does your firm currently have an ownership transition plan?

Percent of firms

				Firm size (number of employees at office) (2019)							Firm specialization (2019)			
	All firms 2015	All firms 2017	All firms 2019	1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	n/a	n/a	23%	4%	6%	26%	48%	74%	88%	88%	8%	26%	40%	19%
No	n/a	n/a	76%	95%	94%	73%	49%	25%	8%	13%	90%	73%	59%	81%
Don't know	n/a	n/a	1%	1%	0%	1%	3%	1%	4%	0%	1%	1%	1%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.6

Does your office currently have a written business plan?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
Yes	n/a	n/a	36%	22%	32%	41%	50%	45%	62%	75%	30%	37%	45%	35%
No	n/a	n/a	63%	78%	67%	58%	47%	53%	38%	19%	70%	63%	54%	65%
Don't know	n/a	n/a	1%	0%	1%	1%	3%	2%	0%	6%	1%	0%	1%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 1.7

When was that business plan last updated?

Percent of firms that have a written business plan

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
Within the last year	n/a	n/a	28%	15%	13%	22%	30%	41%	75%	83%	13%	35%	32%	64%
1–2 years ago	n/a	n/a	27%	23%	25%	39%	23%	39%	19%	8%	27%	35%	26%	0%
3–4 years ago	n/a	n/a	18%	20%	23%	18%	24%	8%	0%	8%	31%	4%	16%	20%
5 or more years ago	n/a	n/a	25%	43%	35%	19%	21%	10%	6%	0%	29%	26%	21%	16%
Don’t know	n/a	n/a	2%	0%	4%	2%	1%	2%	0%	0%	0%	1%	5%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.8

Does your office currently have a business continuity plan?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	n/a	n/a	23%	9%	14%	30%	39%	45%	54%	81%	15%	26%	32%	20%
No	n/a	n/a	75%	91%	85%	69%	58%	49%	42%	13%	84%	74%	64%	80%
Don't know	n/a	n/a	2%	1%	1%	1%	4%	6%	4%	6%	1%	0%	4%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 1.9

Which of the following are included in your office's business continuity plan?

Percent of firms that have a business continuity plan—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Telework-ready employees	n/a	n/a	95%	81%	97%	93%	98%	98%	100%	92%	94%	91%	98%	86%
Cloud or off-network storage of files	n/a	n/a	86%	88%	93%	75%	89%	86%	79%	92%	83%	82%	90%	79%
Emergency preparedness plan	n/a	n/a	49%	50%	20%	38%	57%	63%	71%	77%	37%	53%	56%	43%
Hazard insurance	n/a	n/a	42%	19%	20%	50%	43%	45%	64%	69%	31%	35%	52%	28%
Cyber attack recovery plan	n/a	n/a	40%	25%	13%	37%	57%	45%	43%	85%	22%	46%	46%	50%
Disaster recovery plan	n/a	n/a	38%	31%	17%	32%	39%	35%	64%	92%	30%	36%	45%	64%
Other	n/a	n/a	4%	6%	7%	8%	0%	2%	0%	0%	3%	6%	3%	15%
Don't know	n/a	n/a	1%	0%	0%	2%	0%	0%	0%	8%	0%	0%	1%	0%

Some data may not add to total due to decimal rounding.

Table 1.10

In which of these ways is your firm recognized on a FEDERAL level?

Percent of firms—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Small business (as defined by the U.S. Small Business Administration, makes less than $7.5 million gross revenues annually)	60%	58%	45%	37%	52%	54%	59%	43%	4%	0%	40%	51%	46%	58%
Woman-owned business enterprise (WBE)	7%	8%	5%	3%	7%	6%	6%	7%	0%	0%	3%	5%	8%	7%
Minority-owned business enterprise (MBE)	4%	5%	3%	0%	5%	3%	5%	3%	0%	0%	1%	1%	7%	3%
Small disadvantaged businesses/disadvantaged business enterprises (SDB/DBE)	3%	4%	3%	2%	3%	4%	4%	2%	0%	0%	1%	1%	7%	0%
Disabled veteran businesses (DVBE)	0%	0%	1%	1%	0%	0%	1%	2%	0%	0%	0%	0%	2%	0%
8(a) designation	0%	1%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	1%	0%
HUBZone business enterprises (HUB)	1%	1%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%
None of these	38%	39%	35%	43%	26%	23%	19%	39%	92%	100%	34%	37%	34%	26%

Table 1.11

In which of these ways is your firm recognized on a STATE/LOCAL level?

Percent of firms—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Small business (as defined by the U.S. Small Business Administration, makes less than $7.5 million gross revenues annually)	63%	60%	57%	53%	63%	70%	71%	49%	4%	0%	57%	57%	57%	67%
Woman-owned business enterprise (WBE)	9%	10%	11%	9%	13%	12%	9%	12%	0%	0%	11%	6%	14%	17%
Minority-owned business enterprise (MBE)	5%	7%	7%	5%	7%	12%	9%	7%	4%	0%	7%	4%	10%	8%
Small disadvantaged businesses/disadvantaged business enterprises (SDB/DBE)	4%	4%	6%	6%	4%	13%	7%	6%	0%	0%	3%	3%	11%	4%
HUBZone business enterprises (HUB)	1%	1%	1%	0%	2%	1%	0%	2%	0%	0%	0%	2%	1%	3%
Disabled veteran businesses (DVBE)	0%	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%	1%	1%	0%
8(a) designation	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%
None of these	34%	35%	37%	46%	30%	21%	19%	40%	88%	100%	36%	40%	34%	28%

Table 1.12

Does your firm have more than one permanent office (either inside or outside the US)?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	12%	13%	16%	4%	9%	12%	19%	34%	69%	88%	9%	18%	20%	14%
No	88%	87%	84%	96%	91%	88%	81%	66%	31%	13%	91%	82%	80%	86%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.13

Including yours, how many permanent domestic offices does your firm have?

Percent of firms with multiple offices

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
5 or more	19%	12%	10%	0%	0%	8%	7%	8%	17%	29%	2%	6%	15%	10%
4	6%	8%	4%	0%	0%	4%	0%	8%	6%	7%	0%	4%	3%	0%
3	12%	18%	12%	0%	0%	4%	11%	16%	22%	29%	0%	24%	15%	0%
2	54%	53%	49%	25%	50%	63%	67%	62%	50%	14%	68%	49%	43%	50%
1	9%	9%	22%	75%	40%	21%	15%	3%	6%	21%	22%	17%	21%	40%
0	n/a	n/a	2%	0%	10%	0%	0%	0%	0%	0%	5%	0%	3%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average number of permanent domestic offices	**8**	**4**	**3**	**1**	**1**	**2**	**3**	**3**	**4**	**6**	**2**	**3**	**3**	**3**

Table 1.14

Including yours, how many permanent foreign offices does your firm have?

Percent of firms with multiple offices

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
5 or more	7%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
4	1%	2%	2%	0%	0%	0%	0%	0%	6%	7%	0%	4%	0%	0%
3	2%	1%	1%	0%	0%	0%	0%	0%	0%	7%	0%	0%	3%	0%
2	3%	3%	2%	0%	0%	0%	0%	0%	6%	7%	0%	4%	3%	0%
1	17%	15%	8%	13%	10%	4%	4%	3%	0%	29%	9%	2%	6%	40%
0	70%	77%	87%	88%	90%	96%	96%	95%	89%	50%	89%	90%	89%	60%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average number of permanent foreign offices	**2**	**1**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**1**	**0**	**0**	**0**	**0**

Some data may not add to total due to decimal rounding.

Table 1.15

Including you, how many of the paid staff in your office–not including contractors–were in each of these categories as of January 1, 2020?

Percent of paid staff and average number of paid staff by position (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Architecture staff	**57%**	**61%**	**61%**	**100%**	**82%**	**76%**	**72%**	**69%**	**68%**	**56%**	**76%**	**62%**	**67%**	**70%**
Licensed architects (not including principals/partners)	20%	22%	22%	4%	12%	18%	23%	23%	23%	22%	24%	20%	25%	22%
Principals/partners	11%	10%	9%	96%	37%	21%	17%	13%	10%	7%	13%	9%	12%	10%
Emerging professionals on the path to licensure (formerly known as interns)	13%	19%	16%	0%	17%	20%	19%	20%	14%	15%	25%	19%	17%	12%
Non-licensed architecture staff not on licensure path (nonregistered graduate architecture staff other than principals/partners or emerging professionals/students)	12%	8%	14%	1%	16%	17%	13%	13%	21%	12%	14%	14%	13%	26%
Students	1%	1%	2%	0%	2%	5%	2%	2%	2%	1%	2%	2%	2%	0%
Other design professionals (including both licensed and unlicensed staff)	**25%**	**22%**	**18%**	**0%**	**4%**	**6%**	**10%**	**13%**	**18%**	**21%**	**9%**	**20%**	**17%**	**13%**
Engineers	11%	7%	6%	0%	0%	0%	1%	2%	3%	9%	0%	1%	4%	0%
Certified/registered interior designers	n/a	n/a	3%	0%	1%	1%	3%	4%	7%	2%	3%	4%	4%	7%
Interior designers that are not certified/registered	n/a	n/a	3%	0%	2%	3%	4%	3%	5%	3%	4%	6%	2%	4%
Planners	2%	2%	2%	0%	0%	0%	0%	1%	1%	2%	0%	1%	3%	1%
Landscape architects	1%	2%	2%	0%	0%	0%	0%	1%	1%	3%	1%	7%	2%	0%
Zoning/code specialists	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other design staff	6%	4%	2%	0%	1%	2%	2%	2%	1%	2%	1%	1%	2%	1%
Other staff	**18%**	**18%**	**19%**	**0%**	**11%**	**13%**	**16%**	**15%**	**13%**	**23%**	**12%**	**14%**	**16%**	**17%**
Nontechnical staff (non-billable)*	9%	10%	13%	0%	8%	10%	12%	11%	10%	15%	9%	9%	12%	13%
Other nondesign professionals (billable)**	6%	5%	3%	0%	2%	2%	2%	2%	1%	4%	2%	4%	2%	1%
Technical staff (non-billable) (e.g., CAD manager, IT manager/ director)	3%	3%	3%	0%	1%	1%	2%	2%	2%	4%	1%	1%	2%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average number of paid staff	**45**	**50**	**64**	**1**	**3**	**7**	**14**	**30**	**70**	**165**	**8**	**52**	**63**	**112**

* (e.g., controller, bookkeeper, accounting clerk, business development manager, marketing manager/assistant, human resources director/manager, office manager, administrative assistant, receptionist, librarian, in-house legal counsel)

** Professional staff other than architects, designers, or other design professionals who are typically billed directly on projects (e.g., healthcare professionals, educational professionals)

Some data may not add to total due to decimal rounding.

Table 1.16

Approximately how many of the total architecture staff in your office are licensed to practice in a foreign country (e.g., other than the US), as of January 1, 2020?

Percent of all architecture staff (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
0%	n/a	78%	77%	93%	93%	88%	83%	82%	64%	65%	84%	79%	79%	58%
1%–9%	n/a	17%	20%	0%	0%	0%	12%	16%	36%	35%	10%	16%	19%	41%
10%–24%	n/a	3%	2%	0%	0%	9%	5%	1%	0%	0%	3%	3%	2%	0%
25%–49%	n/a	1%	1%	0%	5%	2%	0%	1%	0%	0%	1%	1%	0%	1%
50% or more	n/a	1%	0%	7%	2%	1%	0%	0%	0%	0%	1%	0%	0%	0%
Total	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.17

Approximately how many of the total payroll staff in your office in each of these categories are PART-TIME, as of January 1, 2020?

Percent of all payroll staff that are part-time by position (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Architecture staff	3%	2%	2%	0%	0%	0%	0%	0%	0%	1%	0%	1%	1%	0%
Other design professionals (including both licensed and unlicensed staff)	4%	4%	4%	0%	0%	0%	0%	1%	0%	3%	0%	1%	1%	0%
Other nondesign professionals (billable)	6%	4%	8%	0%	0%	0%	1%	1%	2%	4%	0%	3%	2%	0%
Technical staff (non-billable)	7%	2%	5%	0%	0%	0%	1%	1%	1%	3%	1%	1%	1%	0%
Nontechnical staff (non-billable)	11%	8%	6%	0%	0%	0%	1%	1%	0%	3%	1%	1%	2%	0%

Table 1.18

Approximately how many of the staff members in your office in each of these categories are CONTRACTORS, as of January 1, 2020?

Percent of contract staff at firm by position (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Architecture staff	49%	37%	53%	54%	37%	37%	30%	33%	49%	92%	35%	35%	52%	54%
Other design professionals (including both licensed and unlicensed staff)	22%	41%	30%	30%	26%	22%	22%	12%	41%	0%	11%	31%	16%	39%
Other nondesign professionals (billable)	8%	8%	6%	8%	5%	8%	5%	40%	2%	4%	5%	15%	25%	0%
Technical staff (non-billable)	12%	3%	2%	4%	10%	8%	15%	7%	0%	0%	11%	3%	2%	0%
Nontechnical staff (non-billable)	9%	11%	9%	5%	22%	26%	28%	8%	8%	4%	38%	16%	6%	8%
Total contract staff	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.19

Approximately how many of the total payroll staff (full-time and part-time–not including contractors–in your office) that fall into each of these categories are FEMALE?

Percent of staff by position that are female (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Principals/partners	19%	29%	21%	22%	23%	20%	16%	17%	20%	24%	18%	15%	19%	20%
Licensed architects (not including principals partners)	29%	31%	34%	29%	40%	36%	32%	36%	42%	30%	38%	37%	36%	43%
Non-licensed architecture staff not on licensure path	37%	37%	41%	0%	33%	44%	37%	36%	39%	43%	47%	33%	42%	44%
Emerging professionals on the path to licensure (formerly known as interns)	40%	40%	46%	0%	47%	45%	48%	48%	47%	45%	43%	48%	50%	57%
Students	46%	50%	53%	0%	71%	55%	57%	60%	66%	41%	73%	58%	56%	100%
Other design professionals (including both licensed and unlicensed staff)	44%	49%	43%	0%	69%	70%	64%	58%	62%	38%	82%	70%	48%	87%
Other staff (including nondesign professionals, technical staff, and nontechnical staff)	57%	56%	68%	0%	72%	77%	79%	75%	67%	68%	81%	72%	67%	56%
Average percent of architecture staff who are female	**32%**	**35%**	**37%**	**0%**	**33%**	**37%**	**35%**	**37%**	**40%**	**36%**	**39%**	**37%**	**38%**	**40%**

Table 1.20

Approximately how many of the total payroll staff (full-time and part-time–not including contractors–in your office) in each category are self-identified as a member of a racially and or ethnically diverse demographic group?

Percent of staff by position that are self-identified as a member of a racially and or ethnically diverse demographic group (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Principals/partners	8%	11%	14%	17%	20%	15%	12%	9%	19%	12%	13%	14%	11%	7%
Licensed architects (not including principals partners)	20%	22%	26%	0%	11%	14%	20%	15%	20%	30%	17%	25%	15%	15%
Non-licensed architecture staff not on licensure path	26%	27%	30%	100%	25%	37%	33%	18%	20%	43%	35%	30%	25%	31%
Emerging professionals on the path to licensure (formerly known as interns)	30%	38%	49%	0%	35%	39%	36%	39%	40%	55%	49%	42%	33%	24%
Students	26%	43%	43%	0%	41%	41%	32%	38%	31%	52%	24%	36%	45%	0%
Other design professionals (including both licensed and unlicensed staff)	19%	20%	22%	0%	35%	40%	16%	16%	14%	24%	29%	13%	17%	28%
Other staff (including nondesign professionals, technical staff, and nontechnical staff)	28%	35%	30%	0%	22%	17%	15%	20%	27%	31%	25%	17%	24%	51%
Average percent of architecture staff who are self-identified as a member of a racially and or ethnically diverse demographic group	**22%**	**27%**	**32%**	**0%**	**23%**	**27%**	**25%**	**22%**	**24%**	**37%**	**30%**	**30%**	**21%**	**24%**

For the purposes of this survey, racial and or ethnic diversity is defined as African American, Hispanic/Latino, Native American or Alaskan Native, Subcontinental Asian, Asian or Pacific Islander, two or more races, or other

Table 1.21

Approximately how many of the total payroll staff (full-time and part-time–not including contractors–in your office) are in each of the following age categories?

Percent of employees (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2–4	5–9	10–19	20–49	50–99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Under 25	7%	5%	5%	0%	6%	9%	8%	7%	6%	4%	6%	5%	7%	6%
25–34	29%	34%	36%	1%	19%	27%	32%	32%	34%	39%	37%	40%	34%	43%
35–44	27%	27%	28%	7%	19%	23%	22%	28%	29%	28%	28%	29%	26%	23%
45–54	19%	18%	16%	26%	23%	19%	18%	18%	18%	15%	17%	14%	18%	15%
55–64	14%	12%	11%	29%	21%	14%	14%	12%	10%	10%	8%	9%	12%	8%
65 or older	4%	3%	3%	37%	12%	8%	5%	3%	3%	3%	4%	2%	3%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.22

Approximately how many of the payroll staff (full-time and part-time–not including contractors–in your office) maintain specialty sustainability or resilience credentials (e.g., LEED AP, WELL AP)?

Percent of employees (weighted by number of employees)

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
None	n/a	n/a	35%	78%	70%	58%	46%	29%	45%	11%	54%	41%	31%	62%
1%–9%	n/a	n/a	12%	0%	0%	0%	10%	20%	10%	15%	9%	18%	13%	1%
10%–24%	n/a	n/a	23%	0%	0%	23%	27%	34%	22%	25%	7%	21%	30%	6%
25%–49%	n/a	n/a	26%	0%	19%	16%	17%	17%	13%	49%	16%	19%	21%	29%
50% or more	n/a	n/a	4%	22%	11%	4%	1%	1%	10%	0%	14%	1%	4%	2%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 1.23

What are your firm's current hiring plans to acquire sustainability and resilience skills on staff?

Percent of firms—multiple response permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Not currently hiring	n/a	n/a	55%	64%	65%	46%	42%	41%	19%	13%	63%	50%	44%	79%
We will use external consultants.	n/a	n/a	18%	21%	14%	20%	19%	25%	23%	13%	18%	19%	20%	11%
We will train existing in-house staff.	n/a	n/a	14%	4%	7%	19%	23%	32%	42%	50%	9%	10%	26%	0%
We will hire in-house staff in the next 12 months.	n/a	n/a	5%	1%	1%	10%	9%	10%	27%	19%	1%	7%	9%	3%
We will hire in-house staff in the next 36 months.	n/a	n/a	2%	2%	1%	1%	1%	3%	0%	13%	2%	0%	2%	0%
We may hire in the future, but not specific plans.	n/a	n/a	11%	3%	9%	14%	15%	21%	12%	38%	9%	13%	13%	3%
Unsure/don't know	n/a	n/a	8%	8%	7%	8%	11%	9%	8%	6%	7%	11%	7%	7%

Table 1.24

Which of the following internal equitable and inclusive practices does your office have in place?

Percent of firms—multiple response permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Equitable pay policy and review procedures	n/a	n/a	34%	8%	22%	51%	61%	71%	73%	69%	26%	32%	47%	24%
Leadership development/ preparation opportunities designed to increase diversity and inclusion in leadership positions	n/a	12%*	25%	6%	13%	32%	47%	61%	62%	75%	15%	26%	36%	15%
Statement on diversity	n/a	n/a	19%	3%	8%	30%	36%	50%	38%	69%	9%	17%	32%	16%
Aligning equity, diversity, and inclusion with business goals and objectives	n/a	11%**	18%	9%	12%	26%	25%	33%	38%	63%	16%	17%	22%	13%
Retention strategies designed to help retain a diverse and inclusive workforce	n/a	9%	17%	3%	8%	28%	34%	39%	38%	63%	13%	16%	26%	4%
Training on topics such as anti-bias, antidiscrimination, implicit bias, intercultural competency	n/a	5%***	16%	4%	7%	15%	26%	48%	38%	75%	9%	17%	20%	11%
Employment of people who have diverse abilities	n/a	n/a	8%	3%	5%	9%	11%	13%	23%	50%	5%	8%	10%	11%
An internal employee resource/ affinity group	n/a	2%	7%	2%	2%	4%	7%	19%	27%	63%	4%	7%	10%	1%
Office programs with a focus on global/international diversity and inclusion	n/a	3%	7%	2%	4%	6%	9%	11%	27%	38%	4%	8%	8%	11%
Established metrics, data collection on inclusive-related practices, program, or initiatives	n/a	n/a	6%	2%	1%	6%	9%	17%	19%	63%	4%	4%	10%	4%
A staff member dedicated to managing equity, diversity, and inclusion priorities	n/a	4%	6%	2%	3%	5%	6%	12%	19%	44%	3%	6%	9%	4%
Other	n/a	n/a	2%	3%	1%	1%	0%	2%	4%	0%	2%	1%	1%	3%
None of these	n/a	61%****	51%	79%	64%	33%	18%	10%	12%	6%	60%	53%	35%	58%

* In 2017, asked about leadership development opportunities designed to increase diversity in higher-level positions within the office

** In 2017, only asked about aligning diversity with business goals and objectives

*** In 2017, asked if office-provided training on equity, diversity, and inclusion such as unconscious bias, cultural competency, etc.

**** Combined with external practices in 2017

Table 1.25

Which of the following external equitable and inclusive practices does your office have in place?

Percent of firms—multiple response permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Community outreach related to diversity and inclusion (e.g., links between the office and educational institutions, government, identity-based organizations)	n/a	15%	14%	7%	8%	19%	16%	30%	35%	63%	12%	10%	21%	8%
Participation in cultural events (e.g., Black History Month, Hispanic Heritage Month, Pride Week)	n/a	5%*	14%	8%	10%	12%	11%	23%	46%	56%	10%	10%	16%	13%
Employee perceptions/satisfaction /engagement survey	n/a	8%	12%	2%	5%	9%	19%	32%	65%	69%	7%	11%	19%	8%
K-12 education career awareness in your community targeting underrepresented youth in the profession	n/a	17%**	12%	6%	7%	16%	19%	22%	38%	31%	8%	6%	21%	6%
Employee recruitment strategies designed to increase racial and ethnic diversity and inclusion	n/a	11%	12%	2%	6%	16%	16%	31%	42%	63%	7%	10%	19%	8%
Intercultural competence, awareness-building, and community engagement	n/a	n/a	9%	6%	7%	9%	9%	17%	12%	56%	8%	8%	10%	7%
Higher education career awareness activities in your community targeting underrepresented youth in the profession	n/a	n/a	9%	4%	7%	12%	9%	21%	15%	25%	7%	7%	12%	4%
Strategies to ensure supply-chain equity	n/a	n/a	6%	4%	3%	10%	5%	7%	4%	38%	4%	1%	9%	13%
Incentives, performance measures for management linked to the achievement of organizational equity, diversity, and inclusion goals	n/a	1%***	5%	1%	2%	7%	9%	9%	8%	19%	4%	5%	5%	4%
People managers held accountable for equitable and inclusion-related tasks or outcomes in the performance management process	n/a	2%	3%	1%	1%	5%	3%	7%	15%	19%	1%	3%	6%	1%
Other	n/a	n/a	1%	2%	1%	0%	1%	2%	4%	0%	1%	0%	3%	3%
None of these	n/a	61%****	62%	79%	74%	52%	46%	36%	8%	6%	70%	67%	49%	68%

* In 2017, asked about diversity awareness celebrated in the form of different cultural events

** In 2017, only asked about K-12 education activities in your community

*** In 2017, asked about incentive pay for management linked to the achievement of organizational diversity goals

**** Combined with internal practices in 2017

Table 1.26

In the last three years, what types of outside consultants have your office regularly used?

Percent of firms—multiple response permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Structural engineers	88%	89%	92%	89%	91%	96%	99%	95%	85%	100%	94%	93%	94%	83%
M/E/P engineers	84%	83%	86%	73%	85%	96%	96%	97%	81%	94%	76%	93%	95%	80%
Civil engineers	77%	74%	78%	63%	80%	87%	89%	91%	81%	88%	73%	82%	86%	62%
Landscape architects	60%	60%	63%	43%	58%	75%	84%	85%	85%	81%	58%	63%	73%	46%
Lighting designers	33%	38%	44%	23%	41%	50%	56%	72%	69%	81%	41%	50%	43%	26%
Fire protection	n/a	37%	44%	28%	34%	48%	63%	82%	58%	81%	29%	50%	58%	40%
Interior designers	36%	37%	42%	34%	46%	47%	44%	38%	50%	50%	48%	47%	31%	31%
Acoustical engineers	31%	34%	38%	18%	23%	49%	65%	83%	85%	81%	27%	36%	56%	32%
Renderers/model makers/animators/3D visualization support	n/a	36%	36%	30%	34%	36%	39%	49%	50%	69%	34%	38%	38%	28%
Other professional disciplines	8%	7%	36%	21%	33%	42%	46%	62%	62%	56%	31%	34%	47%	26%
Cost estimators	30%	33%	34%	16%	21%	43%	59%	69%	69%	75%	15%	28%	60%	34%
Permit expediters	25%	28%	30%	20%	26%	29%	37%	44%	65%	69%	29%	39%	25%	31%
Building envelope consultants	18%	22%	28%	15%	19%	28%	48%	59%	65%	56%	24%	26%	37%	24%
Sustainability consultants	17%	20%	23%	10%	14%	21%	34%	59%	54%	81%	21%	17%	31%	18%
Zoning/code compliance consultants	18%	21%	22%	14%	17%	26%	27%	32%	58%	50%	23%	23%	21%	33%
Building performance model consultants	9%	13%	22%	14%	13%	22%	31%	45%	46%	75%	20%	18%	26%	17%
Security consultants	13%	17%	20%	8%	13%	20%	26%	54%	42%	69%	12%	19%	30%	20%
Specification writers	18%	19%	20%	9%	15%	21%	34%	39%	39%	44%	13%	24%	24%	19%
Other design staff	8%	9%	16%	21%	14%	13%	9%	15%	27%	44%	17%	16%	15%	18%
Other specialty consultants (e.g., education, healthcare)	17%	15%	9%	3%	4%	11%	12%	22%	27%	31%	3%	6%	16%	14%
Master planners	3%	4%	4%	1%	1%	2%	6%	12%	23%	25%	1%	5%	7%	5%
Industrial hygienists	4%	3%	4%	2%	1%	3%	7%	7%	15%	25%	1%	6%	8%	3%
Ecologists	n/a	3%	3%	4%	2%	4%	3%	6%	0%	19%	5%	2%	3%	5%
Program specialists	n/a	4%	3%	1%	0%	2%	4%	9%	15%	31%	0%	2%	8%	1%
Urban planners	2%	4%	3%	1%	1%	4%	4%	7%	8%	25%	1%	3%	3%	7%
Materials scientists	4%	4%	3%	2%	1%	4%	4%	6%	0%	19%	1%	3%	4%	0%
Public health professionals	1%	2%	1%	1%	0%	1%	2%	3%	0%	0%	1%	0%	1%	0%

Table 1.27

Has your office surveyed clients regarding their satisfaction with the office's work?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
Yes, in the last 12 months	n/a	n/a	26%	19%	26%	25%	24%	32%	54%	50%	28%	20%	30%	24%
Yes, but more than 12 months ago	n/a	n/a	16%	9%	12%	20%	24%	31%	27%	19%	13%	17%	21%	10%
No	n/a	n/a	57%	71%	60%	54%	49%	37%	19%	25%	58%	62%	47%	67%
Don't know	n/a	n/a	1%	0%	2%	1%	4%	0%	0%	6%	0%	0%	1%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 1.28

Which of the following methods have you used to survey clients regarding their satisfaction with your office's work?

Percent of firms that surveyed clients—multiple response permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
Direct conversation with the client (in person or by phone)	n/a	n/a	66%	67%	68%	69%	60%	60%	57%	73%	66%	66%	66%	50%
Firm-created internal survey	n/a	n/a	35%	21%	33%	40%	36%	50%	43%	27%	33%	37%	33%	38%
Past Performance Questionnaire (PPQ)	n/a	n/a	13%	6%	11%	9%	22%	19%	29%	9%	8%	10%	20%	12%
Outside market research firm for this specific effort	n/a	n/a	9%	0%	1%	3%	10%	16%	33%	55%	2%	11%	15%	4%
Marketing/PR agency on retainer or that we use frequently	n/a	n/a	8%	2%	5%	7%	12%	12%	24%	18%	5%	13%	10%	0%
Self/firm-administered template from outside resource	n/a	n/a	7%	10%	4%	5%	6%	9%	14%	9%	4%	11%	8%	4%
Federal government survey reports by project managers	n/a	n/a	4%	2%	2%	4%	4%	6%	5%	18%	1%	3%	8%	0%
Other	n/a	n/a	6%	10%	5%	4%	6%	4%	5%	9%	8%	2%	4%	17%
Don't know	n/a	n/a	3%	0%	4%	2%	4%	1%	5%	9%	1%	2%	4%	0%

Some data may not add to total due to decimal rounding.

Table 1.29

Does your firm have a Quality Assurance (QA) or Quality Control (QC) process in place?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	n/a	n/a	52%	31%	45%	62%	71%	81%	100%	81%	38%	55%	70%	52%
No, but we are planning to in the next two years	n/a	n/a	14%	12%	15%	17%	17%	13%	0%	6%	15%	13%	14%	11%
No, and we have no plans to do so	n/a	n/a	30%	55%	35%	18%	9%	4%	0%	0%	41%	32%	15%	34%
Don't know	n/a	n/a	3%	2%	5%	3%	4%	2%	0%	13%	5%	0%	2%	3%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 1.30

Does your QA or QC process include checklists?

Percent of firms that have a QA/QC in place

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	n/a	n/a	77%	80%	69%	73%	84%	89%	85%	85%	74%	78%	81%	73%
No	n/a	n/a	21%	20%	29%	26%	15%	9%	12%	15%	25%	22%	16%	27%
Don't know	n/a	n/a	2%	0%	2%	2%	1%	2%	4%	0%	1%	0%	2%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 1.31

At what interval do you typically review for QA/QC?

Percent of firms that have a QA/QC in place

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Prior to major milestones	n/a	n/a	56%	38%	46%	60%	58%	64%	81%	85%	45%	56%	64%	51%
Intermittent as needed	n/a	n/a	33%	44%	40%	28%	34%	25%	15%	15%	41%	33%	29%	19%
Depends on the contract requirement	n/a	n/a	9%	15%	12%	9%	6%	8%	4%	0%	9%	8%	6%	30%
Other	n/a	n/a	2%	4%	2%	2%	2%	2%	0%	0%	4%	2%	1%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 2.1

Out of your office's 2018 gross billings, approximately what were the net billings, pass-throughs/ reimbursables, and other revenue?

Percent of gross billings

	All firms 2014	All firms 2016	All firms 2018	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
2018 net billings	n/a	74%	72%	74%	80%	68%	75%	73%	69%	71%	79%	74%	67%	62%
2018 pass-throughs/ reimbursables	n/a	23%	27%	25%	19%	30%	23%	23%	31%	29%	16%	26%	32%	37%
2018 other revenue	n/a	3%	2%	1%	1%	2%	2%	4%	0%	0%	6%	1%	1%	1%
Total gross billings ($000,000,000)	**$40.6**	**$40.3**	**$55.4**	**$1.0**	**$2.8**	**$4.4**	**$5.9**	**$13.3**	**$12.7**	**$15.4**	**$6.0**	**$10.7**	**$24.7**	**$3.5**

Table 2.2

Out of your office's 2019 gross billings, approximately what were the net billings, pass-throughs/ reimbursables, and other revenue?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
2019 net billings	70%	72%	71%	73%	79%	77%	80%	70%	69%	68%	78%	73%	68%	64%
2019 pass-throughs/ reimbursables	25%	25%	26%	26%	19%	21%	19%	22%	30%	32%	16%	26%	28%	35%
2019 other revenue	5%	3%	3%	1%	1%	3%	1%	8%	1%	0%	5%	1%	4%	2%
Average net billings per employee	**$108,000**	**$115,000**	**$159,000**	**$131,000**	**$124,000**	**$160,000**	**$297,000**	**$210,000**	**$163,000**	**$170,000**	**$141,000**	**$153,000**	**$227,000**	**$125,000**
Total gross billings ($000,000,000)	**$40.6**	**$45.0**	**$63.8**	**$0.9**	**$3.1**	**$4.2**	**$9.8**	**$14.5**	**$12.3**	**$18.9**	**$6.5**	**$10.5**	**$30.1**	**$3.8**

Some data may not add to total due to decimal rounding.

Table 2.3

Approximately what percentage of your office's 2019 gross billings came from each of these categories?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
Projects where your office was the architect of record	83%	85%	84%	84%	92%	91%	93%	88%	83%	75%	94%	79%	87%	81%
Projects where your office was a subcontractor/design architect to another office or firm	6%	6%	8%	9%	2%	5%	5%	6%	5%	17%	2%	12%	7%	10%
Projects where your office worked jointly with another office or firm	5%	5%	5%	4%	2%	3%	2%	5%	6%	8%	3%	5%	5%	7%
Other	6%	4%	2%	3%	4%	1%	0%	2%	6%	0%	1%	4%	1%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 2.4

Approximately what percentage of your office's 2019 gross billings was billed in each of these ways?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
Stipulated sum (fixed fee)	36%	38%	38%	27%	20%	34%	48%	40%	38%	37%	32%	33%	43%	27%
Professional fee plus reimbursable expenses	29%	28%	32%	23%	39%	22%	13%	29%	42%	33%	30%	46%	24%	43%
Hourly rate (with or without agreed maximum)	20%	18%	18%	41%	28%	22%	20%	12%	8%	27%	23%	16%	16%	26%
Percentage of construction cost	11%	13%	10%	5%	9%	17%	10%	15%	11%	3%	11%	3%	15%	2%
Percentage of construction cost not to exceed fixed amount	1%	1%	2%	0%	2%	3%	7%	2%	1%	0%	2%	0%	3%	0%
Fee per square foot	2%	2%	1%	4%	1%	2%	1%	1%	0%	0%	2%	2%	0%	1%
Other	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 2.5

Approximately what are your office's current receivables at each interval?

Dollar amount of all firms, thousands

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Due in 30 days or less	n/a	n/a	$327.3	$12.7	$29.8	$172.8	$168.5	$1,711.7	$969.5	$4,048.6	$63.4	$217.2	$310.9	$2,006.5
Due 31–60 days	n/a	n/a	$170.4	$3.9	$10.3	$61.7	$64.5	$895.5	$571.9	$2,367.2	$20.8	$81.1	$216.3	$1,011.9
Due 61–90 days	n/a	n/a	$90.2	$6.0	$7.5	$33.5	$41.2	$203.9	$490.9	$1,736.9	$17.2	$60.4	$107.0	$480.2
Due over 90 days	n/a	n/a	$113.8	$3.6	$15.0	$31.8	$53.5	$193.4	$592.7	$2,477.8	$15.6	$97.1	$116.1	$281.1
Total receivables	**n/a**	**n/a**	**$701.7**	**$26.2**	**$62.6**	**$299.8**	**$327.7**	**$3,004.5**	**$2,625.0**	**$10,630.5**	**$117.0**	**$455.8**	**$750.3**	**$3,779.7**

Table 2.6

As of the end of last month, what is your estimate of the backlog of projects at your office?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Less than 1 month	n/a	n/a	13%	25%	13%	6%	2%	4%	4%	0%	15%	12%	8%	26%
1 to less than 3 months	n/a	n/a	32%	37%	40%	32%	30%	12%	8%	0%	37%	37%	22%	31%
3 to less than 6 months	n/a	n/a	30%	25%	26%	34%	33%	50%	35%	19%	28%	30%	33%	26%
6 to less than 12 months	n/a	n/a	19%	11%	15%	21%	30%	26%	31%	50%	15%	18%	27%	16%
12 months or more	n/a	n/a	5%	1%	4%	7%	4%	8%	23%	25%	4%	3%	8%	0%
Don't know	n/a	n/a	1%	2%	1%	0%	1%	0%	0%	6%	1%	0%	1%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average backlog in months	**n/a**	**n/a**	**5**	**3**	**4**	**5**	**5**	**6**	**8**	**9**	**4**	**4**	**6**	**3**

Some data may not add to total due to decimal rounding.

Table 2.7

Approximately what percentage of your office's 2019 gross billings came from each of the following types of clients (that is, the person or entity invoiced for your office's work)?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
State or local government (including public schools)	16%	21%	23%	5%	11%	20%	43%	21%	26%	16%	2%	3%	38%	5%
Other business, commercial, or industrial companies	20%	16%	17%	11%	19%	16%	8%	14%	21%	21%	8%	27%	11%	50%
Developers	20%	23%	17%	11%	13%	12%	15%	19%	25%	12%	33%	33%	7%	16%
Private individuals	16%	14%	12%	54%	36%	29%	12%	12%	4%	4%	48%	16%	4%	7%
Nonprofit organizations or institutions (e.g., private schools, museums, churches)	9%	8%	11%	5%	10%	9%	6%	19%	7%	13%	5%	3%	18%	1%
Construction companies (including design-build)	7%	8%	8%	5%	6%	7%	6%	5%	8%	12%	2%	10%	10%	0%
Federal government	5%	4%	5%	1%	0%	3%	5%	6%	2%	11%	0%	1%	7%	6%
Other architects, engineers, design professionals	3%	4%	4%	6%	3%	4%	4%	3%	5%	5%	1%	4%	5%	1%
Interior designers	1%	1%	2%	0%	0%	0%	0%	0%	1%	6%	0%	3%	0%	12%
Other	3%	2%	0%	2%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 2.8

Approximately what percentage of your office's 2019 gross billings came from each of the following sources of work?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Repeat clients, noncompetitive selection	46%	43%	40%	52%	54%	46%	35%	51%	38%	30%	47%	49%	38%	20%
Repeat clients, competitive selection (interview, proposals, etc.)	26%	28%	30%	4%	10%	17%	40%	24%	35%	38%	7%	23%	36%	42%
New clients, noncompetitive selection	11%	11%	9%	27%	17%	16%	9%	8%	5%	6%	22%	11%	6%	2%
New clients, competitive selection (interview, proposals, etc.)	17%	19%	21%	18%	19%	21%	15%	18%	22%	26%	24%	17%	20%	36%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 2.9

Did your office provide pro bono work (defined as professional services for which the architect/firm receives no compensation, other than for reimbursable expenses) in 2019?

Percent of firms

				Firm size (number of employees at office) (2019)							Firm specialization (2019)			
	All firms 2015	All firms 2017	All firms 2019	1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	54%	54%	52%	39%	51%	59%	61%	69%	54%	63%	46%	53%	56%	53%
No	46%	46%	48%	61%	49%	41%	39%	31%	46%	38%	54%	47%	44%	47%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 2.10

Approximately what percentage of your office's 2019 billable hours went to pro bono work for a nonprofit entity or public entity serving social needs?

Percent of firms that provided pro bono work in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
30% or more	n/a	3%	2%	7%	0%	3%	1%	0%	0%	10%	3%	0%	2%	5%
20%–29%	n/a	3%	3%	6%	3%	2%	1%	0%	0%	0%	4%	0%	4%	0%
10%–19%	n/a	14%	18%	36%	17%	14%	12%	4%	8%	0%	21%	16%	11%	32%
7%–9%	n/a	3%	1%	0%	1%	1%	2%	0%	0%	0%	2%	0%	0%	0%
5%–6%	n/a	26%	24%	20%	33%	28%	20%	18%	8%	0%	23%	25%	26%	19%
3%–4%	n/a	9%	7%	6%	2%	11%	8%	16%	8%	0%	6%	7%	8%	0%
1%–2%	n/a	33%	33%	10%	24%	36%	44%	58%	69%	90%	23%	40%	40%	16%
None	n/a	7%	13%	16%	20%	6%	11%	4%	8%	0%	18%	13%	9%	27%
Total	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**n/a**	**7%**	**6%**	**11%**	**5%**	**6%**	**5%**	**3%**	**2%**	**11%**	**7%**	**4%**	**6%**	**10%**

Table 2.11

Approximately what percentage of your office's 2019 billable hours went to pro bono work for noncompensated services for for-profit clients?

Percent of firms that provided pro bono work in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
30% or more	n/a	2%	1%	1%	2%	2%	1%	0%	0%	0%	1%	0%	1%	5%
20%–29%	n/a	2%	3%	3%	3%	3%	1%	3%	0%	20%	2%	1%	5%	11%
10%–19%	n/a	9%	7%	10%	7%	8%	6%	1%	8%	0%	9%	9%	2%	6%
7%–9%	n/a	1%	1%	0%	1%	1%	1%	0%	0%	0%	2%	0%	0%	0%
5%–6%	n/a	17%	17%	14%	21%	20%	15%	14%	8%	10%	17%	12%	17%	25%
3%–4%	n/a	5%	6%	3%	5%	3%	10%	16%	0%	0%	3%	7%	6%	14%
1%–2%	n/a	26%	22%	4%	20%	22%	41%	31%	69%	10%	15%	26%	28%	11%
None	n/a	38%	43%	64%	42%	42%	25%	35%	15%	60%	50%	44%	40%	29%
Total	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**n/a**	**4%**	**4%**	**4%**	**4%**	**4%**	**4%**	**2%**	**2%**	**5%**	**3%**	**2%**	**3%**	**10%**

Some data may not add to total due to decimal rounding.

Table 2.12

Does your office's professional liability insurance cover your pro bono work?

Percent of firms that provided pro bono work in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	n/a	n/a	46%	33%	43%	47%	45%	61%	64%	100%	35%	45%	60%	61%
No	n/a	n/a	7%	17%	6%	3%	7%	3%	0%	0%	9%	6%	3%	10%
Don't know	n/a	n/a	47%	50%	51%	51%	48%	36%	36%	0%	56%	48%	38%	29%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 2.13

Approximately what percentage of your office's 2019 net billings went to staff costs for marketing and business development (including estimated value of principal's and staff time)?

Percent of firms indicating percent of net billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
30% or more	6%	7%	5%	7%	7%	3%	2%	2%	0%	0%	4%	6%	6%	0%
20%–29%	7%	6%	6%	6%	5%	8%	7%	4%	4%	6%	6%	3%	7%	8%
10%–19%	22%	23%	22%	12%	23%	30%	31%	29%	15%	19%	19%	22%	24%	16%
7%–9%	4%	4%	4%	1%	1%	5%	4%	8%	15%	19%	2%	4%	7%	0%
5%–6%	20%	18%	22%	16%	25%	21%	24%	21%	35%	25%	21%	22%	22%	33%
3%–4%	7%	7%	7%	2%	7%	11%	11%	11%	8%	19%	5%	8%	10%	3%
1%–2%	12%	13%	12%	7%	13%	14%	11%	22%	19%	0%	13%	14%	11%	8%
None	22%	21%	22%	51%	18%	7%	9%	3%	4%	13%	30%	22%	12%	32%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**10%**	**10%**	**9%**	**7%**	**11%**	**9%**	**8%**	**8%**	**6%**	**7%**	**7%**	**9%**	**11%**	**6%**

Table 2.14

Approximately what percentage of your office's 2019 net billings went to direct expenses for marketing and business development?

Percent of firms indicating percent of net billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/ Industrial	Institutional	Mixed
30% or more	3%	2%	1%	2%	0%	1%	0%	0%	0%	0%	1%	1%	0%	0%
20%–29%	3%	3%	2%	2%	4%	1%	1%	3%	0%	0%	3%	0%	2%	3%
10%–19%	11%	14%	11%	13%	11%	11%	12%	9%	8%	0%	14%	12%	9%	3%
7%–9%	2%	2%	1%	2%	1%	1%	3%	0%	0%	0%	1%	1%	1%	3%
5%–6%	22%	21%	25%	25%	25%	28%	26%	20%	23%	13%	24%	25%	23%	37%
3%–4%	8%	8%	9%	4%	6%	15%	9%	12%	15%	31%	8%	11%	9%	7%
1%–2%	30%	31%	32%	16%	34%	35%	39%	50%	50%	38%	29%	30%	38%	28%
None	21%	20%	19%	36%	18%	7%	11%	6%	4%	19%	20%	20%	17%	19%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**6%**	**6%**	**4%**	**5%**	**4%**	**5%**	**4%**	**4%**	**3%**	**2%**	**5%**	**4%**	**4%**	**4%**

Some data may not add to total due to decimal rounding.

Table 2.15

As a percentage of 2019 net billings, what was your office's approximate 2019 profit after all compensation was paid (including owners'/principals' compensation), but before paying out any taxes, discretionary bonuses, or profit-sharing?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2–4	5–9	10–19	20–49	50–99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
30% or more	n/a	n/a	11%	18%	11%	9%	5%	8%	15%	0%	14%	14%	8%	9%
25%–29.9%	14%*	15%*	6%	6%	3%	7%	10%	7%	15%	7%	6%	5%	7%	2%
20%–24.9%	7%	8%	12%	14%	12%	9%	8%	16%	4%	36%	14%	14%	12%	4%
15%–19.9%	10%	11%	13%	6%	14%	12%	15%	13%	15%	36%	10%	14%	14%	19%
10%–14.9%	17%	19%	17%	15%	14%	17%	20%	22%	19%	14%	12%	17%	19%	15%
5%–9.9%	16%	17%	14%	14%	12%	18%	14%	18%	19%	7%	14%	15%	13%	15%
2.5%–4.9%	11%	7%	8%	4%	9%	9%	12%	8%	8%	0%	8%	10%	9%	2%
0%–2.4%	14%	12%	11%	14%	12%	12%	8%	6%	4%	0%	13%	6%	11%	17%
Less than 0% (loss)	10%	10%	9%	10%	12%	6%	8%	3%	0%	0%	9%	7%	7%	17%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average profit, as a percentage of net billings	**13.4%**	**14.9%**	**13.6%**	**14.7%**	**12.4%**	**12.9%**	**12.6%**	**14.6%**	**17.3%**	**18.5%**	**13.9%**	**14.8%**	**13.3%**	**10.3%**

* 2015 and 2017, previous breaks were 25% or more, 20% to 24.9%, 15% to 19.9%, 10% to 14.9%, 5% to 9.9%, 2.5% to 4.9%, 0% to 2.4%, and less than 0%

Some data may not add to total due to decimal rounding.

Table 2.16

What is your office's net worth as of January 1, 2020?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
$5,000,000 or more	n/a	3%	4%	0%	0%	0%	0%	13%	31%	69%	0%	3%	7%	1%
$1,000,000–$4,999,999	n/a	14%	13%	1%	1%	13%	29%	59%	58%	19%	7%	15%	21%	11%
$500,000–$999,999	n/a	10%	9%	3%	5%	17%	23%	17%	4%	0%	7%	9%	14%	3%
$250,000–$499,999	n/a	17%	12%	4%	14%	24%	20%	5%	0%	6%	8%	14%	14%	10%
$100,000–$249,999	n/a	55%*	17%	15%	21%	22%	17%	4%	0%	0%	15%	18%	17%	14%
$50,000–$99,999	n/a	n/a	14%	21%	19%	10%	2%	0%	0%	0%	18%	15%	7%	14%
Less than $50,000	n/a	n/a	30%	54%	39%	12%	6%	3%	4%	0%	42%	25%	19%	43%
Total	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

* 2017, previous breaks were $5,000,000 or more; $1,000,000–$4,999,999; $500,000–$999,999; $250,000–$499,999; and less than $250,000

Some data may not add to total due to decimal rounding.

Table 2.17

What is the approximate value of your office's business loans and/or debt as of January 1, 2020?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2–4	5–9	10–19	20–49	50–99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
$1,000,000 or more	n/a	1%	2%	0%	0%	0%	0%	6%	15%	38%	0%	1%	3%	0%
$500,000–$999,999	n/a	2%	1%	0%	0%	0%	4%	6%	4%	6%	0%	0%	2%	4%
$250,000–$499,999	n/a	3%	3%	0%	0%	1%	4%	9%	27%	6%	1%	4%	4%	1%
$100,000–$249,999	n/a	29%*	5%	2%	2%	8%	15%	15%	4%	6%	3%	9%	8%	1%
$50,000–$99,999	n/a	n/a	7%	2%	6%	14%	11%	9%	0%	6%	5%	9%	8%	3%
$1–$49,999	n/a	n/a	18%	21%	21%	24%	12%	7%	8%	0%	22%	17%	16%	15%
None/$0	n/a	64%	63%	76%	71%	51%	52%	46%	42%	31%	69%	59%	58%	75%
Total	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean ($000)	**n/a**	**$123**	**$70**	**$10**	**$13**	**$44**	**$85**	**$215**	**$369**	**$692**	**$27**	**$67**	**$108**	**$44**

* 2017, previous breaks were $5,000,000 or more, $1,000,000–$4,999,999, $500,000–$999,999, $250,000–$499,999, $1–$250,000, and none

Some data may not add to total due to decimal rounding.

Table 2.18

What is the approximate value of the bad debts that your office wrote off in 2019?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
$100,000 or more	n/a	3%	3%	0%	0%	0%	1%	12%	23%	25%	1%	4%	2%	3%
$10,000–$99,999	n/a	17%	14%	3%	7%	18%	24%	36%	38%	50%	8%	19%	15%	18%
$5,000–$9,999	n/a	26%*	10%	7%	9%	13%	17%	6%	8%	13%	11%	10%	8%	3%
$2,500–$4,999	n/a	n/a	8%	6%	7%	14%	9%	5%	8%	0%	6%	7%	9%	6%
$1–$2,499	n/a	n/a	12%	10%	14%	12%	11%	8%	12%	6%	12%	12%	11%	7%
None/$0	n/a	54%	53%	74%	61%	40%	39%	31%	12%	0%	61%	47%	54%	64%
Total	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean ($000)	**n/a**	**$17**	**$14**	**$3**	**$6**	**$13**	**$16**	**$40**	**$58**	**$72**	**$7**	**$18**	**$14**	**$15**

* (2017, previous breaks were $500,000 or more; $250,000–$499,999; $100,000–$249,999; $10,000–$99,999; $1–$9,999; and none)

Some data may not add to total due to decimal rounding.

Table 2.19

Which of the following types of contractual agreements does your office typically use?

Percent of firms—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
AIA contract documents	n/a	n/a	72%	49%	68%	83%	89%	95%	100%	100%	55%	74%	91%	68%
Custom internal agreements	n/a	n/a	60%	64%	61%	60%	56%	47%	50%	63%	69%	64%	39%	67%
Client-furnished agreements	n/a	n/a	32%	15%	19%	36%	51%	69%	73%	94%	11%	26%	60%	37%
Letters of understanding (LOUs)	n/a	n/a	27%	26%	26%	20%	28%	26%	38%	56%	23%	26%	32%	33%
No formal agreement	n/a	n/a	5%	7%	6%	4%	5%	2%	0%	0%	7%	5%	3%	0%
Other	n/a	n/a	3%	1%	3%	1%	3%	6%	0%	19%	1%	2%	4%	3%
Do not engage in this type of project	n/a	n/a	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Table 3.1

Approximately what percentage of your office's 2019 gross billings came from each of the following types of projects?

Percent of gross billings

				Firm size (number of employees at office) (2019)							Firm specialization (2019)			
	All firms 2015	All firms 2017	All firms 2019	1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Education (K-12)	8%	12%	14%	3%	3%	12%	28%	13%	19%	4%	1%	1%	24%	0%
Education (college/university)	9%	8%	12%	4%	4%	5%	17%	13%	10%	16%	1%	2%	20%	2%
Office	13%	14%	12%	10%	12%	11%	5%	10%	15%	14%	5%	26%	6%	17%
Healthcare	11%	7%	11%	2%	7%	5%	7%	19%	11%	10%	1%	3%	18%	3%
Multifamily residential	11%	13%	10%	12%	17%	11%	9%	10%	11%	6%	39%	9%	3%	9%
Single-family residential	7%	7%	8%	44%	27%	22%	7%	5%	1%	2%	45%	5%	1%	1%
Other government/civic (e.g., post office, federal office buildings)	5%	5%	6%	2%	5%	5%	6%	8%	2%	9%	0%	2%	9%	3%
Hospitality	7%	5%	5%	2%	3%	3%	3%	5%	8%	3%	2%	18%	1%	7%
Retail, food services, warehouses, etc.	7%	5%	4%	8%	7%	9%	6%	3%	4%	1%	2%	15%	1%	3%
Transportation (e.g., airports, rail, bus, mass transit)	3%	3%	3%	1%	0%	2%	1%	1%	4%	6%	0%	3%	4%	0%
Recreational (e.g., sports centers, theme parks)	2%	1%	2%	1%	1%	5%	1%	2%	4%	2%	0%	1%	4%	1%
Manufacturing	5%	4%	2%	1%	3%	2%	1%	3%	2%	1%	0%	7%	1%	1%
Cultural (e.g., museums)	1%	2%	2%	3%	1%	1%	1%	2%	2%	4%	1%	1%	2%	0%
Distribution/warehousing	2%	1%	1%	1%	2%	1%	1%	1%	1%	3%	0%	6%	1%	0%
Religious	2%	2%	1%	2%	3%	2%	2%	1%	1%	1%	1%	1%	2%	0%
Justice (e.g., corrections, courthouses)	1%	1%	1%	0%	0%	1%	0%	2%	1%	0%	0%	0%	2%	0%
Communications	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other construction projects	5%	3%	4%	1%	2%	2%	1%	1%	1%	15%	0%	1%	0%	46%
Nonconstruction projects and activities	1%	5%	2%	3%	3%	1%	4%	2%	1%	4%	1%	1%	2%	6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 3.2

Approximately what percentage of your office's 2019 gross billings came from each of these project categories?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
New construction projects	54%	54%	49%	40%	39%	45%	38%	45%	60%	50%	58%	57%	45%	46%
Renovations, rehabilitations, retrofits	28%	29%	31%	34%	38%	34%	46%	33%	25%	25%	26%	30%	34%	30%
Additions to existing structures	13%	11%	13%	18%	16%	16%	8%	13%	11%	14%	12%	9%	13%	20%
Historic preservation activities	2%	3%	3%	3%	4%	3%	3%	4%	1%	6%	3%	2%	3%	1%
Other nonconstruction-related services	3%	3%	4%	5%	3%	2%	6%	5%	3%	4%	2%	2%	5%	4%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 3.3

If at least some of your office's 2019 gross billings came from residential work (single-family and/ or multifamily units), approximately what percentage of that residential work's residential work's gross billings came from each of these categories?

Percent of residential gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Construction of new multifamily housing units	52%	56%	60%	15%	26%	25%	52%	59%	75%	86%	40%	71%	57%	86%
Construction of new single-family housing units	24%	21%	21%	34%	24%	31%	29%	16%	22%	11%	27%	18%	26%	3%
Renovations/remodels/alter-ations of existing housing units	16%	17%	13%	29%	34%	31%	13%	17%	2%	1%	22%	8%	11%	9%
Additions to existing housing units	8%	7%	6%	23%	15%	13%	7%	7%	1%	1%	10%	4%	6%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 3.4

Did your office begin design work on any residential and/or nonresidential projects in 2019?

Percent of firms—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes, began work on residential projects	70%	68%	67%	72%	72%	66%	59%	54%	46%	44%	93%	55%	37%	60%
Yes, began work on nonresidential projects	65%	60%	68%	52%	66%	77%	77%	87%	96%	69%	46%	85%	82%	61%
No	11%	14%	7%	9%	8%	6%	5%	6%	0%	19%	4%	8%	12%	8%

Table 3.5

Considering only residential construction projects for which design work was begun by your office in 2019, how many were new single-family or multifamily housing units (not properties; e.g., count a fourplex as 4 units) of each of these sizes and how many were each type of addition/renovation?

Percent of housing units started in 2019, of firms with new residential construction starts in 2019 where office was architect of record

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
New single-family housing	**7%**	**10%**	**9%**	**21%**	**13%**	**7%**	**12%**	**6%**	**1%**	**0%**	**12%**	**3%**	**5%**	**36%**
Less than 1,800 square feet	1%	4%	3%	6%	2%	2%	6%	3%	0%	0%	4%	1%	1%	2%
1,800–3,999 square feet	4%	4%	4%	9%	6%	4%	5%	2%	0%	0%	5%	1%	3%	23%
4,000 square feet or more	2%	2%	2%	7%	5%	2%	1%	1%	1%	0%	3%	1%	1%	11%
Mean single-family housing units started	**6.5**	**8.6**	**7.8**	**4.5**	**5.7**	**5.9**	**17.7**	**26.7**	**2.5**	**1.1**	**10.5**	**3.3**	**4.1**	**8.4**
New multifamily housing	**76%**	**73%**	**71%**	**27%**	**52%**	**69%**	**68%**	**84%**	**96%**	**100%**	**62%**	**88%**	**78%**	**24%**
Less than 1,200 square feet	48%	53%	51%	19%	38%	48%	49%	67%	50%	55%	48%	62%	59%	0%
1,200–1,799 square feet	17%	13%	12%	4%	6%	14%	13%	12%	25%	30%	7%	16%	15%	17%
1,800 square feet or more	11%	7%	7%	4%	8%	8%	6%	5%	21%	14%	6%	10%	4%	7%
Mean multifamily housing units started	**72.5**	**62.8**	**62.7**	**5.6**	**22.6**	**58.0**	**100.6**	**381.1**	**264.3**	**368.3**	**55.0**	**95.1**	**61.1**	**5.7**
Additions/Renovations (single and multifamily)	**17%**	**18%**	**20%**	**52%**	**35%**	**24%**	**20%**	**10%**	**3%**	**0%**	**26%**	**9%**	**17%**	**40%**
Additions/major structural alterations	9%	10%	12%	36%	23%	9%	10%	6%	3%	0%	15%	5%	7%	34%
Kitchen/bath remodels	3%	5%	4%	9%	6%	6%	5%	3%	0%	0%	6%	1%	5%	3%
Other renovations	5%	3%	4%	7%	6%	8%	5%	1%	0%	0%	5%	2%	5%	3%
Mean additions/renovations housing units started	**15.9**	**15.2**	**17.8**	**11.0**	**15.6**	**19.8**	**29.3**	**45.3**	**7.0**	**0.6**	**23.6**	**9.9**	**13.3**	**9.4**

Some data may not add to total due to decimal rounding.

Table 3.6

Considering the residential projects your office began design work on in 2019, approximately what percentage of that construction contract value came from buildings with qualities of resilience?

Percent of firms that began residential projects in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
0%	n/a	n/a	34%	36%	32%	34%	34%	35%	44%	29%	31%	48%	32%	39%
1%–5%	n/a	n/a	3%	3%	1%	5%	3%	2%	0%	0%	3%	3%	2%	0%
6%–10%	n/a	n/a	5%	5%	4%	5%	3%	8%	11%	0%	4%	2%	8%	14%
11%–25%	n/a	n/a	4%	4%	2%	3%	4%	10%	0%	14%	3%	3%	5%	5%
26%–50%	n/a	n/a	7%	5%	10%	8%	6%	8%	0%	0%	8%	4%	7%	0%
51%–90%	n/a	n/a	10%	10%	10%	8%	10%	8%	11%	14%	11%	9%	7%	3%
More than 90%	n/a	n/a	19%	12%	26%	19%	21%	6%	11%	43%	18%	15%	27%	34%
Don't know	n/a	n/a	19%	26%	15%	17%	19%	21%	22%	0%	22%	16%	12%	6%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**n/a**	**n/a**	**36%**	**29%**	**43%**	**34%**	**38%**	**23%**	**25%**	**54%**	**38%**	**27%**	**40%**	**38%**

Some data may not add to total due to decimal rounding.

Table 3.7

Considering the residential projects your office began design work on in 2019, approximately what percentage of that construction contract value came from buildings that met/are expected to meet a performance/sustainability/health ratings standard (e.g., LEED, WELL, RELi)

Percent of firms that began residential projects in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
0%	n/a	n/a	48%	56%	51%	46%	43%	37%	0%	29%	49%	50%	48%	41%
1%–5%	n/a	n/a	3%	2%	1%	5%	6%	5%	0%	0%	3%	5%	2%	0%
6%–10%	n/a	n/a	6%	4%	6%	6%	8%	5%	25%	0%	6%	6%	4%	7%
11%–25%	n/a	n/a	4%	3%	4%	5%	4%	9%	8%	0%	6%	6%	2%	0%
26%–50%	n/a	n/a	4%	3%	1%	6%	3%	7%	8%	29%	3%	4%	7%	0%
51%–90%	n/a	n/a	9%	7%	10%	6%	8%	19%	8%	29%	9%	13%	10%	9%
More than 90%	n/a	n/a	12%	11%	13%	14%	15%	5%	17%	14%	12%	6%	17%	24%
Don't know	n/a	n/a	14%	13%	14%	12%	15%	12%	33%	0%	14%	12%	11%	19%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**n/a**	**n/a**	**25%**	**21%**	**25%**	**24%**	**26%**	**28%**	**43%**	**46%**	**24%**	**20%**	**30%**	**37%**

Some data may not add to total due to decimal rounding.

Table 3.8

Considering the nonresidential projects your office began design work on in 2019, approximately what percentage of that construction contract value came from buildings with qualities of resilience?

Percent of firms that began nonresidential projects in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
0%	n/a	n/a	35%	45%	42%	31%	29%	17%	32%	0%	42%	41%	29%	34%
1%–5%	n/a	n/a	4%	3%	3%	5%	7%	4%	5%	0%	5%	4%	3%	9%
6%–10%	n/a	n/a	7%	5%	5%	5%	7%	13%	21%	10%	4%	5%	9%	6%
11%–25%	n/a	n/a	5%	3%	4%	6%	6%	8%	5%	20%	4%	4%	7%	0%
26%–50%	n/a	n/a	7%	5%	6%	11%	9%	6%	5%	0%	7%	6%	7%	6%
51%–90%	n/a	n/a	11%	5%	11%	9%	9%	17%	21%	40%	7%	11%	16%	0%
More than 90%	n/a	n/a	12%	11%	15%	11%	11%	12%	0%	10%	6%	11%	14%	37%
Don't know	n/a	n/a	19%	23%	14%	24%	22%	23%	11%	20%	25%	18%	15%	9%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**n/a**	**n/a**	**29%**	**22%**	**30%**	**29%**	**29%**	**37%**	**23%**	**55%**	**19%**	**27%**	**35%**	**42%**

Some data may not add to total due to decimal rounding.

Table 3.9

Considering the nonresidential projects your office began design work on in 2019, approximately what percentage of that construction contract value came from buildings that met/are expected to meet a performance/sustainability/health ratings standard (e.g., LEED, WELL, RELi)

Percent of firms that began nonresidential projects in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
0%	n/a	n/a	44%	59%	60%	40%	34%	15%	0%	0%	65%	42%	31%	50%
1%–5%	n/a	n/a	6%	5%	5%	9%	7%	9%	4%	0%	4%	6%	7%	7%
6%–10%	n/a	n/a	5%	1%	2%	7%	7%	8%	21%	0%	4%	8%	5%	0%
11%–25%	n/a	n/a	7%	4%	5%	6%	10%	14%	17%	18%	3%	10%	8%	5%
26%–50%	n/a	n/a	8%	6%	3%	10%	12%	14%	4%	27%	2%	10%	11%	7%
51%–90%	n/a	n/a	12%	6%	8%	8%	11%	21%	38%	45%	4%	11%	20%	0%
More than 90%	n/a	n/a	7%	11%	5%	7%	9%	5%	8%	0%	4%	3%	9%	17%
Don't know	n/a	n/a	12%	9%	14%	13%	10%	13%	8%	9%	14%	11%	8%	14%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**n/a**	**n/a**	**23%**	**19%**	**15%**	**21%**	**27%**	**34%**	**46%**	**52%**	**10%**	**19%**	**33%**	**23%**

Some data may not add to total due to decimal rounding.

Table 3.10

Did your office conduct any Post-Occupancy Evaluations (POEs) in 2019?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	n/a	n/a	14%	7%	9%	13%	20%	25%	42%	54%	9%	13%	25%	10%
No	n/a	n/a	83%	93%	90%	83%	73%	65%	54%	38%	89%	85%	71%	88%
Don't know	n/a	n/a	3%	1%	1%	4%	8%	10%	4%	8%	2%	2%	4%	2%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 3.11

On what percentage of your firm's built projects did you conduct a Post-Occupancy Evaluation (POE) in 2019?

Percent of firms that conducted POEs

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
1%–5%	n/a	n/a	19%	9%	12%	17%	19%	24%	27%	29%	8%	22%	22%	14%
6%–10%	n/a	n/a	26%	45%	18%	8%	46%	16%	27%	29%	22%	25%	31%	29%
11%–25%	n/a	n/a	18%	18%	18%	13%	19%	32%	9%	14%	7%	32%	17%	28%
26%–50%	n/a	n/a	23%	18%	24%	42%	8%	20%	27%	29%	32%	22%	22%	0%
51%–75%	n/a	n/a	4%	9%	6%	8%	0%	0%	0%	0%	12%	0%	1%	0%
75%–99%	n/a	n/a	6%	0%	12%	0%	8%	8%	9%	0%	5%	0%	5%	28%
100% of our projects	n/a	n/a	3%	0%	12%	4%	0%	0%	0%	0%	13%	0%	0%	0%
Don't know	n/a	n/a	1%	0%	0%	8%	0%	0%	0%	0%	0%	0%	3%	0%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mean	**n/a**	**n/a**	**25%**	**19%**	**39%**	**31%**	**17%**	**22%**	**23%**	**16%**	**40%**	**16%**	**20%**	**32%**

Some data may not add to total due to decimal rounding.

Table 3.12

Which of the following elements did you include in your POEs in 2019?

Percent of firms that conducted POEs—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Contact the owner/occupant to see how things are going	n/a	n/a	96%	91%	100%	92%	96%	96%	100%	100%	95%	94%	99%	100%
Survey building occupants on satisfaction	n/a	n/a	72%	45%	65%	84%	81%	68%	91%	71%	61%	69%	78%	72%
Obtain utility bill to determine actual performance	n/a	n/a	31%	27%	35%	28%	31%	40%	9%	57%	34%	25%	33%	14%
Prepare building user's manual for building operator	n/a	n/a	30%	9%	24%	36%	35%	36%	27%	57%	22%	38%	33%	28%
Share collected data with building occupants	n/a	n/a	26%	0%	18%	28%	31%	28%	36%	57%	10%	28%	32%	72%
Teach occupants and operators how to improve building performance	n/a	n/a	26%	18%	24%	20%	15%	32%	27%	57%	24%	22%	27%	0%
Pre-occupancy evaluation	n/a	n/a	25%	9%	12%	20%	27%	44%	27%	57%	9%	25%	31%	43%
Post-occupancy energy analysis	n/a	n/a	24%	0%	6%	24%	27%	32%	36%	71%	12%	22%	27%	72%
Develop and share strategies to improve the building's performance	n/a	n/a	20%	9%	6%	24%	12%	28%	27%	57%	17%	12%	24%	28%
Record O&M training videos for future operators	n/a	n/a	16%	0%	0%	12%	31%	24%	36%	14%	2%	0%	28%	0%
Formal onsite daylight measurements	n/a	n/a	12%	9%	18%	4%	8%	20%	9%	14%	10%	13%	15%	0%
Data logging of indoor environmental measurements	n/a	n/a	10%	9%	0%	8%	12%	24%	9%	14%	5%	9%	13%	0%
Formal post-occupancy air quality testing	n/a	n/a	7%	0%	6%	4%	8%	12%	9%	14%	0%	9%	10%	0%
Other	n/a	n/a	1%	9%	0%	0%	0%	0%	0%	0%	0%	6%	0%	0%

Table 4.1

Approximately what percentage of your office's 2019 gross billings came from each of the following service categories?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Basic design services (e.g., schematic design, design development, construction documents, bidding/negotiations, construction administration)	64%	65%	71%	68%	72%	75%	75%	69%	71%	71%	76%	65%	71%	87%
Planning and predesign services (e.g., code analysis, master planning, programming, property valuation, site planning/selection, urban design)	10%	10%	9%	11%	10%	9%	7%	10%	7%	10%	8%	10%	9%	9%
Expanded design services (e.g., cost estimating, interior program management, value design, LEED certification, program management, value engineering)	7%	7%	6%	4%	4%	4%	4%	6%	8%	5%	4%	9%	5%	2%
Nonarchitectural design services (e.g., civil engineering, landscape architecture/design, structural engineering)	8%	9%	6%	1%	4%	4%	3%	6%	9%	6%	3%	6%	7%	1%
Construction services (e.g., construction management, design-build)	5%	5%	4%	6%	3%	3%	3%	7%	2%	3%	7%	2%	4%	0%
Integrated project delivery services (IPD) (e.g., conceptualization, criteria design, detailed design, implementation documents, agency coordination/buyout, construction, closeout)	5%	3%	3%	5%	4%	3%	2%	2%	1%	4%	2%	7%	2%	0%
Operations and maintenance services (e.g., commissioning, energy monitoring, post-occupancy evaluation)	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%
Other	1%	3%	1%	4%	3%	1%	6%	0%	1%	0%	1%	0%	2%	1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 4.2

Approximately what percentage of your office's 2019 gross billings was/will be delivered in each of these ways?

Percent of gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Traditional design-bid-build contract with owner	61%	68%	59%	75%	77%	68%	68%	43%	51%	71%	75%	79%	44%	79%
Construction manager as constructor (CM at risk)	13%	11%	19%	2%	6%	8%	19%	30%	29%	5%	2%	3%	32%	0%
Design-build contract: contractor-led	12%	10%	9%	7%	7%	10%	8%	8%	7%	17%	3%	10%	10%	17%
Construction manager as agent (agency CM)	5%	4%	4%	0%	1%	4%	1%	3%	8%	2%	1%	3%	5%	0%
Integrated project delivery (IPD)	3%	1%	4%	1%	2%	1%	1%	9%	5%	0%	9%	1%	4%	0%
Design-build contract: architect-led	3%	2%	2%	8%	3%	5%	3%	3%	0%	2%	7%	2%	1%	0%
Public-private partnership (P3)	n/a	1%	1%	0%	0%	1%	1%	1%	0%	1%	0%	0%	1%	0%
Design-build-operate-maintain	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
Design-build-finance-operate-maintain	1%	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%
Design-build-finance	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	2%	3%	1%	7%	4%	2%	0%	2%	0%	0%	2%	1%	1%	4%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 4.3

How do you typically monitor/evaluate actual building performance?

Percent of firms—mulitple responses permited

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Occupant survey(s)	52%	58%	48%	45%	58%	36%	44%	38%	72%	55%	49%	45%	52%	50%
Energy model calibration and/or monitoring	51%	31%	44%	35%	38%	47%	47%	58%	61%	45%	39%	44%	49%	40%
Building controls	45%	30%	39%	24%	34%	43%	48%	47%	39%	73%	32%	33%	47%	43%
Commissioning/retro commissioning	47%	30%	36%	14%	23%	38%	59%	55%	61%	55%	19%	25%	59%	32%
Overall benchmarking and tracking	37%	21%	25%	12%	20%	26%	17%	38%	44%	73%	18%	21%	27%	29%
Monitor energy meters	n/a	12%	16%	16%	14%	17%	20%	15%	11%	27%	16%	15%	17%	21%
Water consumption/monitoring	24%	12%	14%	8%	13%	12%	17%	22%	11%	36%	15%	12%	15%	15%
Dashboard	18%	10%	8%	4%	3%	4%	9%	12%	22%	36%	5%	6%	10%	7%
Portable/temporary light or temperature meters	n/a	7%	5%	6%	3%	2%	5%	5%	11%	9%	4%	3%	7%	0%
Other	7%	10%	7%	16%	6%	9%	3%	7%	0%	0%	12%	7%	3%	11%
Do not evaluate building performance	n/a	n/a	59%	70%	64%	53%	51%	42%	31%	15%	65%	64%	45%	58%

Table 4.4

Is your office currently using energy modeling on projects?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes, we use energy modeling on our projects in-house	n/a	n/a	9%	9%	6%	9%	10%	12%	12%	38%	10%	11%	7%	9%
Yes, the consultants we work with use energy modeling	n/a	n/a	42%	29%	33%	53%	55%	68%	73%	46%	35%	39%	58%	35%
No, but plan to	n/a	n/a	13%	21%	16%	9%	10%	2%	0%	0%	15%	13%	12%	9%
No, and we do not plan to	n/a	n/a	30%	36%	39%	24%	17%	14%	8%	8%	33%	34%	19%	42%
Unsure/don't know	n/a	n/a	6%	5%	6%	5%	8%	4%	8%	8%	7%	4%	5%	4%
Total	n/a	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 4.5

What share of your office's revenue is from projects using energy modeling software?

Percent of firms using energy modeling software for billable work

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
100%	n/a	7%	8%	11%	8%	11%	7%	3%	0%	9%	12%	5%	4%	14%
75%–99%	n/a	9%	12%	8%	15%	9%	9%	11%	19%	27%	14%	8%	13%	14%
50%–74%	n/a	13%	12%	11%	5%	14%	14%	13%	10%	45%	8%	8%	18%	7%
25%–49%	n/a	9%	12%	11%	10%	12%	9%	15%	19%	0%	10%	11%	11%	11%
1%–24%	n/a	55%	31%	25%	32%	31%	38%	38%	24%	18%	26%	46%	29%	25%
None	n/a	8%	26%	33%	29%	24%	22%	21%	29%	0%	29%	23%	25%	29%
Total	n/a	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average percent of revenue	**n/a**	**28%**	**31%**	**30%**	**30%**	**33%**	**30%**	**28%**	**30%**	**63%**	**34%**	**24%**	**32%**	**35%**

Some data may not add to total due to decimal rounding.

Table 4.6

How has your office integrated practice-relevant research into your practice?

Percent of firms—multiple response permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
We use literature reviews or consume existing research on an ad hoc basis depending on the project	n/a	43%	44%	38%	42%	51%	46%	47%	54%	50%	44%	38%	50%	48%
We save our past projects as case studies to revisit/analyze	57%	46%	43%	32%	42%	51%	53%	61%	46%	44%	47%	37%	46%	29%
We promote a culture of knowledge sharing	n/a	n/a	40%	26%	30%	53%	54%	69%	65%	75%	35%	34%	53%	33%
We use research on products to inform our project specifications versus using previous product specs as a standard practice	n/a	35%	38%	36%	33%	42%	45%	52%	46%	38%	37%	36%	44%	35%
We have an in-house database/ library of research	27%	27%	26%	13%	20%	35%	39%	44%	42%	50%	22%	27%	28%	28%
We contribute to and/or use evidence-based design	n/a	n/a	10%	4%	7%	9%	13%	21%	31%	38%	7%	7%	17%	11%
We use a consultant to advise on relevant research	14%	9%	10%	6%	8%	12%	11%	19%	8%	19%	9%	9%	10%	14%
We have applied for a R&D tax credit in the last two years	n/a	5%*	9%	1%	3%	9%	16%	36%	27%	31%	4%	8%	15%	6%
We subscribe/secure access to a research library (including virtual)	8%	7%	8%	7%	6%	9%	11%	15%	8%	6%	7%	8%	7%	17%
We received a R&D tax credit in the last two years	n/a	5%*	8%	1%	2%	8%	12%	31%	23%	31%	4%	7%	12%	8%
We conduct peer-reviewed research	n/a	n/a	6%	6%	3%	8%	6%	16%	4%	19%	6%	4%	9%	3%
We have an annual budget for research study or investigations	n/a	n/a	3%	1%	1%	4%	3%	7%	8%	31%	2%	2%	4%	11%
We have a formal research department/director that integrates research into all our projects	3%	3%	2%	2%	1%	3%	3%	4%	4%	19%	2%	0%	3%	11%
We have a formal partnership with a university, either supporting or collaborating on research	3%	2%	1%	0%	1%	1%	1%	5%	12%	6%	1%	1%	3%	3%
Other	3%	2%	2%	3%	1%	1%	0%	1%	4%	6%	2%	1%	1%	3%
We do not engage in practice-relevant research	n/a	34%	28%	38%	36%	19%	15%	12%	12%	6%	32%	33%	18%	29%

* Did not ask specifically if applied or received in the last two years

Table 4.7

How much was your most recent R&D tax credit?

Percent of firms that received a R&D tax credit, amount of credit received

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
$200,000 or more	n/a	14%	10%	0%	0%	6%	12%	9%	0%	40%	5%	15%	7%	0%
$100,000–$199,999	n/a	12%	10%	0%	0%	0%	0%	24%	0%	20%	11%	5%	14%	0%
$50,000–$99,999	n/a	30%	26%	0%	0%	25%	12%	30%	50%	40%	11%	15%	30%	33%
$25,000–$49,999	n/a	29%	29%	0%	0%	31%	59%	30%	33%	0%	33%	20%	35%	33%
Less than $25,000	n/a	15%	25%	100%	100%	38%	18%	6%	17%	0%	39%	45%	14%	34%
Average tax credit ($000)	**n/a**	**$96**	**$68**	**$15**	**$15**	**$48**	**$56**	**$89**	**$52**	**$140**	**$53**	**$62**	**$72**	**$41**

Table 4.8

Did your office incorporate the following practices into any of your projects in 2019?

Percent of firms—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Design charettes	n/a	n/a	46%	24%	31%	55%	73%	86%	96%	94%	33%	44%	63%	44%
Standard/documented project delivery process	n/a	n/a	33%	23%	27%	35%	40%	48%	54%	75%	29%	28%	41%	27%
Peer reviews	n/a	n/a	24%	9%	17%	33%	34%	43%	50%	69%	18%	21%	30%	39%
Participatory or community design process	n/a	n/a	23%	7%	14%	26%	44%	51%	42%	88%	11%	16%	41%	26%
Integrative design process	n/a	n/a	19%	14%	14%	20%	26%	30%	23%	69%	15%	18%	26%	24%
Modular design/construction	n/a	n/a	13%	9%	8%	11%	20%	27%	38%	38%	11%	16%	13%	21%
Evidence-based design	n/a	n/a	13%	7%	7%	13%	19%	24%	38%	63%	7%	11%	22%	15%
Offsite fabrication	n/a	n/a	12%	13%	5%	10%	16%	20%	15%	50%	11%	13%	10%	15%
Alternative project delivery	n/a	n/a	9%	3%	6%	10%	14%	17%	31%	44%	4%	9%	16%	14%
Design benchmarking	n/a	n/a	7%	2%	4%	5%	9%	21%	19%	50%	4%	6%	11%	15%
Don't know	n/a	n/a	31%	49%	40%	16%	9%	6%	0%	6%	38%	34%	17%	29%

Table 4.9

Is your office currently using building information modeling (BIM) software?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes, we are using it for billable work	40%	45%	51%	29%	35%	57%	85%	92%	100%	100%	39%	51%	66%	40%
Yes, but we are not yet using it for billable work	9%	7%	7%	8%	8%	11%	6%	2%	0%	0%	9%	8%	6%	3%
No, but plan to acquire within the next 12 months	4%	4%	3%	2%	4%	4%	1%	0%	0%	0%	3%	5%	1%	0%
No, but plan to acquire sometime	10%	11%	9%	9%	15%	9%	4%	0%	0%	0%	10%	10%	7%	14%
No and do not plan to acquire because contractors are using BIM software	2%	7%	10%	18%	12%	4%	1%	4%	0%	0%	12%	8%	8%	13%
No, and do not plan to acquire for other reasons	35%	26%	20%	33%	26%	14%	3%	3%	0%	0%	27%	19%	12%	31%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 4.10

What share of your office's revenue is from projects using BIM software?

Percent of firms using BIM software for billable work

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
100%	32%	34%	35%	60%	41%	33%	23%	31%	15%	19%	57%	23%	27%	41%
75%–99%	32%	30%	34%	21%	19%	31%	47%	47%	50%	50%	27%	36%	40%	21%
50%–74%	10%	12%	12%	4%	11%	17%	12%	10%	23%	13%	7%	19%	13%	14%
25%–49%	9%	8%	9%	6%	18%	10%	7%	4%	4%	6%	5%	10%	10%	11%
1%–24%	17%	16%	10%	9%	12%	8%	11%	7%	8%	13%	4%	11%	11%	14%
None	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%	1%	1%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Average percent of revenue	**70%**	**71%**	**76%**	**83%**	**69%**	**74%**	**75%**	**81%**	**74%**	**74%**	**86%**	**71%**	**74%**	**71%**

Some data may not add to total due to decimal rounding.

Table 4.11

For which of the following services is BIM being used at your office?

Percent of firms using BIM software for billable work—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Design visualization	92%	88%	84%	84%	78%	83%	89%	89%	88%	88%	84%	85%	88%	93%
Presentation and renderings	81%	85%	82%	75%	74%	83%	87%	89%	100%	88%	79%	81%	90%	71%
Coordinated construction documents	82%	74%	75%	66%	67%	75%	79%	88%	88%	81%	73%	70%	81%	64%
Sharing models with consultants	66%	69%	74%	51%	60%	83%	86%	89%	96%	88%	63%	76%	84%	71%
Sharing models with clients/ owners	55%	61%	59%	50%	53%	62%	54%	66%	81%	75%	58%	56%	59%	71%
Resolving conflicts with other disciplines	55%	49%	54%	32%	29%	59%	68%	75%	88%	88%	35%	49%	73%	54%
Sharing models with constructors/trade contractors	44%	47%	49%	26%	31%	51%	57%	75%	88%	75%	40%	42%	60%	58%
Managing model data during construction	n/a	23%	26%	18%	13%	28%	28%	43%	31%	69%	23%	23%	28%	32%
Energy/performance analysis	28%	24%	26%	15%	13%	33%	27%	37%	31%	81%	21%	17%	34%	25%
Quantity takeoffs/estimating	31%	28%	25%	25%	11%	32%	20%	32%	27%	69%	22%	20%	31%	22%
Fabrication and prototyping	n/a	11%	9%	9%	5%	9%	7%	13%	4%	31%	10%	9%	7%	13%
4D scheduling and sequencing	n/a	6%	3%	1%	1%	3%	2%	4%	8%	25%	2%	4%	5%	0%
Other	2%	1%	3%	7%	3%	4%	1%	1%	0%	6%	4%	3%	2%	0%

Table 4.12

How are you using the following technology in your office?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Cloud computing use–information mobility														
For marketing purposes*	n/a	n/a	1%	2%	0%	3%	2%	1%	0%	0%	2%	2%	1%	0%
For design/project purposes**	n/a	n/a	27%	22%	30%	29%	29%	28%	31%	27%	21%	29%	33%	52%
For both marketing and design project purposes	n/a	n/a	33%	26%	26%	38%	40%	46%	46%	73%	31%	32%	34%	25%
Not using	n/a	n/a	39%	50%	43%	31%	30%	25%	23%	0%	46%	38%	32%	23%
4D/5D modeling														
For marketing purposes*	n/a	n/a	1%	1%	0%	2%	1%	0%	0%	0%	0%	1%	2%	0%
For design/project purposes**	n/a	n/a	5%	4%	3%	7%	10%	6%	8%	8%	3%	6%	5%	9%
For both marketing and design project purposes	n/a	n/a	5%	2%	2%	5%	7%	11%	13%	23%	3%	5%	6%	1%
Not using	n/a	n/a	90%	93%	94%	87%	82%	83%	79%	69%	93%	89%	87%	90%
3D printing														
For marketing purposes*	n/a	n/a	1%	0%	0%	3%	2%	5%	4%	0%	0%	1%	2%	0%
For design/project purposes**	n/a	n/a	7%	3%	4%	8%	11%	17%	8%	20%	5%	7%	8%	13%
For both marketing and design project purposes	n/a	n/a	9%	1%	5%	6%	9%	23%	31%	67%	6%	10%	10%	10%
Not using	n/a	n/a	84%	96%	90%	83%	78%	56%	58%	13%	89%	82%	80%	77%
Virtual reality														
For marketing purposes*	n/a	n/a	2%	0%	0%	3%	4%	7%	4%	7%	1%	3%	3%	0%
For design/project purposes**	n/a	n/a	9%	5%	7%	10%	14%	12%	19%	13%	7%	9%	11%	17%
For both marketing and design project purposes	n/a	n/a	18%	10%	6%	23%	24%	35%	58%	73%	11%	17%	24%	7%
Not using	n/a	n/a	72%	85%	87%	64%	58%	47%	19%	7%	81%	71%	62%	76%

* e.g., demonstration of capabilities, client proposals, advertising/promotion

** e.g., design, specification, project delivery

Some data may not add to total due to decimal rounding.

Table 5.1

In 2019, did your firm (not just your office) work on any international projects; that is, projects built outside the US and/or inside the US for international clients?

Percent of firms

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019): 1	2-4	5-9	10-19	20-49	50-99	100+	Firm specialization (2019): Residential	Commercial/Industrial	Institutional	Mixed
Yes	10%	9%	10%	4%	6%	9%	13%	12%	35%	81%	6%	12%	10%	19%
No, but have worked on international projects in the last 3 years	8%	6%	6%	4%	4%	8%	6%	11%	4%	6%	7%	6%	4%	10%
No, but pursuing potential international projects	12%	10%	8%	10%	8%	7%	11%	9%	4%	0%	8%	8%	9%	10%
No, and not currently interested in pursuing international projects	70%	76%	76%	81%	82%	76%	69%	68%	58%	13%	80%	74%	77%	61%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 5.2

Did your firm derive any gross billings in 2019 from international projects (projects built outside the US and/or inside the US for international clients)?

Percent of headquarters/single-office firms that worked on international projects in 2019

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Yes	81%	77%	83%	75%	67%	67%	94%	85%	89%	100%	76%	81%	86%	85%
No	19%	23%	17%	25%	33%	33%	6%	15%	11%	0%	24%	19%	14%	15%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 5.3

Approximately what percentage of your firm's 2019 gross billings from international projects was derived from projects in each of the following categories?

Percent of total gross firm billings nationally derived from international projects

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Inside US for international clients	1.5%	1.4%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.1%	0.0%	0.1%	0.1%
Outside US for international clients	2.4%	1.0%	1.7%	0.0%	0.0%	0.0%	0.1%	0.1%	0.6%	0.8%	0.0%	0.7%	0.4%	0.2%
Outside US for US clients other than the federal government	0.5%	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.3%	0.0%	0.1%	0.4%	0.0%
Outside US for federal government	1.1%	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%
Total share of billings from international projects	**5.5%**	**2.6%**	**5.8%**	**0.6%**	**0.2%**	**0.3%**	**0.4%**	**1.2%**	**5.5%**	**20.1%**	**0.5%**	**3.7%**	**5.0%**	**2.9%**
Average gross billings from international projects ($000,000,000)	**$2.22**	**$1.17**	**$3.69**	**$0.01**	**$0.00**	**$0.01**	**$0.04**	**$0.17**	**$0.68**	**$3.81**	**$0.03**	**$0.39**	**$1.51**	**$0.11**

Table 5.4

Approximately what share of your firm's gross billings from international projects outside the US (not including projects inside the US for international clients) were from each of the following international regions in 2019?

Percent of 2019 gross billings from projects outside the US, by region

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
East Asia and Pacific (including Korea, Japan, SE Asia, Australia, Oceania; does not include China)	12%	12%	19%	0%	7%	35%	0%	0%	16%	24%	2%	15%	0%	47%
Sub-Saharan Africa	9%	0%	18%	0%	0%	0%	0%	0%	0%	34%	0%	0%	69%	0%
Middle East and North Africa	18%	7%	10%	40%	22%	0%	0%	0%	10%	11%	6%	13%	2%	0%
Central America and Caribbean	n/a	6%	10%	0%	56%	0%	17%	10%	19%	2%	59%	18%	0%	0%
Western Europe (excluding UK)	6%	20%	9%	0%	0%	2%	10%	0%	16%	5%	5%	15%	1%	22%
Mexico	n/a	6%	7%	0%	0%	0%	42%	1%	14%	2%	0%	14%	5%	0%
Eastern Europe and Eurasia	4%	2%	7%	0%	0%	0%	0%	0%	15%	2%	0%	13%	3%	0%
Canada	5%	11%	7%	0%	15%	3%	19%	71%	4%	5%	21%	6%	15%	1%
China	14%	27%	6%	0%	0%	49%	0%	0%	3%	8%	0%	3%	2%	20%
South and Central Asia (including India)	5%	2%	3%	0%	0%	0%	12%	0%	0%	6%	0%	0%	1%	0%
South America	6%	7%	1%	0%	0%	0%	0%	14%	2%	0%	0%	3%	0%	0%
United Kingdom	n/a	n/a	1%	0%	0%	0%	0%	4%	0%	2%	0%	0%	0%	9%
Other	n/a	n/a	1%	60%	0%	11%	0%	0%	0%	0%	8%	0%	2%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 5.5

What share of your firm's 2019 international gross billings are derived from projects based out of a foreign office versus a US office (i.e., offices in locations outside the United States, its territories, and possessions)?

Percent of 2019 international gross billings

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Based out of US office	78%	81%	86%	100%	92%	100%	91%	100%	79%	75%	92%	84%	91%	84%
Based out of foreign office	22%	19%	14%	0%	8%	0%	9%	0%	21%	25%	8%	16%	9%	16%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 5.6

In what areas outside the US does your firm currently have permanent offices?

Percent of firms with at least one foreign office—multiple responses permitted

				Firm size (number of employees at office) (2019)							Firm specialization (2019)			
	All firms 2015	All firms 2017	All firms 2019	1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
China	3%	2%	4%	0%	0%	0%	0%	4%	10%	21%	0%	4%	2%	9%
Middle East and North Africa	3%	2%	4%	0%	5%	0%	0%	0%	10%	14%	3%	4%	4%	0%
United Kingdom	n/a	n/a	4%	0%	0%	0%	0%	0%	10%	21%	0%	4%	4%	9%
East Asia and Pacific (including Korea, Japan, SE Asia, Australia, Oceania; does not include China)	2%	2%	3%	6%	0%	0%	0%	4%	10%	7%	2%	4%	4%	0%
Canada	0%	1%	2%	0%	0%	6%	4%	4%	0%	0%	2%	2%	2%	0%
Western Europe (excluding UK)	1%	3%	1%	0%	5%	3%	0%	0%	0%	0%	2%	0%	0%	10%
Central America and Caribbean	n/a	0%	1%	0%	5%	0%	0%	0%	0%	0%	3%	0%	0%	0%
South and Central Asia (including India)	0%	0%	1%	6%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%
Mexico	n/a	1%	1%	0%	0%	0%	0%	0%	0%	7%	0%	0%	4%	0%
Sub-Saharan Africa	0%	0%	1%	0%	0%	0%	0%	0%	0%	7%	0%	0%	4%	0%
South America	2%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Eastern Europe and Eurasia	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
No permanent offices outside the US	89%	89%	84%	88%	86%	88%	96%	88%	90%	50%	85%	91%	84%	72%

Table 5.7

How often has your firm teamed up with an in-country partner on its international projects?

Percent of firms with international projects

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Always	25%	24%	21%	25%	14%	29%	22%	16%	20%	21%	30%	21%	18%	19%
Most of the time	14%	14%	21%	6%	24%	12%	19%	16%	40%	36%	23%	26%	16%	19%
Some of the time	19%	19%	19%	19%	14%	21%	11%	28%	10%	29%	16%	19%	27%	0%
Never	41%	43%	40%	50%	48%	38%	48%	40%	30%	14%	31%	34%	39%	62%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Some data may not add to total due to decimal rounding.

Table 5.8

What services does your firm generally provide on international projects?

Percent of firms with international projects—multiple responses permitted

	All firms 2015	All firms 2017	All firms 2019	Firm size (number of employees at office) (2019)							Firm specialization (2019)			
				1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Schematic design	86%	79%	85%	69%	90%	82%	93%	84%	90%	86%	92%	85%	92%	57%
Pre-design/specialty consulting	78%	74%	76%	81%	71%	59%	85%	68%	80%	93%	71%	85%	82%	57%
Design development	73%	71%	73%	63%	71%	76%	85%	68%	70%	79%	81%	79%	81%	48%
Construction documents	42%	40%	42%	38%	38%	32%	67%	52%	20%	50%	45%	40%	49%	28%
Construction administration	26%	28%	30%	19%	14%	32%	48%	24%	20%	57%	29%	30%	37%	19%
Bid/negotiations	16%	21%	20%	19%	10%	9%	37%	24%	10%	36%	26%	11%	27%	0%
Non-architectural services	16%	18%	19%	19%	5%	18%	22%	28%	0%	43%	21%	6%	25%	9%
Other	8%	9%	9%	19%	14%	3%	0%	0%	10%	14%	3%	2%	8%	29%

Table 5.9

How do your firm's international projects (including US projects for international clients) typically compare with your domestic projects in each of these areas?

Percent of firms with international projects, differences between international and domestic projects in each area

				Firm size (number of employees at office) (2019)							Firm specialization (2019)			
	All firms 2015	All firms 2017	All firms 2019	1	2-4	5-9	10-19	20-49	50-99	100+	Residential	Commercial/ Industrial	Institutional	Mixed
Cost of doing business														
More	42%	36%	37%	20%	30%	34%	62%	45%	22%	50%	38%	33%	41%	45%
Same	46%	44%	42%	53%	30%	45%	31%	50%	67%	33%	39%	45%	42%	45%
Less	12%	20%	21%	27%	40%	21%	8%	5%	11%	17%	23%	21%	17%	10%
Client familiarity														
More	21%	24%	23%	27%	30%	23%	25%	20%	25%	8%	29%	21%	16%	20%
Same	62%	65%	61%	60%	60%	53%	75%	70%	50%	58%	52%	57%	79%	65%
Less	17%	11%	16%	13%	10%	23%	0%	10%	25%	33%	19%	22%	5%	15%
Win rate														
More	21%	26%	25%	7%	35%	24%	32%	25%	33%	17%	27%	21%	28%	20%
Same	61%	55%	52%	53%	50%	52%	60%	55%	44%	50%	51%	52%	57%	45%
Less	18%	20%	23%	40%	15%	24%	8%	20%	22%	33%	23%	26%	15%	35%
Problems encountered after award														
More	25%	17%	21%	0%	21%	20%	21%	20%	33%	42%	10%	26%	27%	28%
Same	58%	64%	59%	80%	47%	60%	63%	70%	44%	50%	69%	47%	60%	72%
Less	17%	18%	20%	20%	32%	20%	17%	10%	22%	8%	21%	26%	13%	0%
Construction account aging														
More	22%	18%	18%	20%	5%	7%	12%	16%	33%	50%	5%	34%	24%	16%
Same	64%	64%	60%	73%	63%	69%	80%	63%	33%	25%	70%	52%	67%	61%
Less	14%	18%	21%	7%	32%	24%	8%	21%	33%	25%	25%	14%	9%	22%
Marketing costs														
More	22%	14%	19%	0%	20%	17%	19%	25%	22%	33%	19%	17%	22%	15%
Same	51%	53%	53%	73%	35%	45%	65%	55%	56%	50%	44%	60%	50%	85%
Less	27%	32%	28%	27%	45%	38%	15%	20%	22%	17%	37%	24%	28%	0%
Profitability														
More	17%	22%	15%	15%	14%	13%	19%	15%	25%	8%	18%	21%	9%	10%
Same	53%	55%	51%	62%	33%	57%	65%	55%	63%	42%	41%	60%	57%	50%
Less	30%	23%	33%	23%	52%	30%	15%	30%	13%	50%	41%	18%	34%	40%
Competition for projects														
More	15%	16%	12%	13%	5%	3%	4%	20%	11%	33%	10%	14%	9%	5%
Same	50%	51%	48%	60%	50%	33%	52%	45%	56%	42%	47%	50%	46%	65%
Less	35%	33%	40%	27%	45%	63%	44%	35%	33%	25%	43%	36%	46%	30%

Some data may not add to total due to decimal rounding.

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