REPORT IMPRESSION
European Electrical Installation Monitor Q3-2023
Theme topic: BIM
Nov-2023

A product by USP Marketing Consultancy

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About European Electrical Installation Monitor

THE GOAL

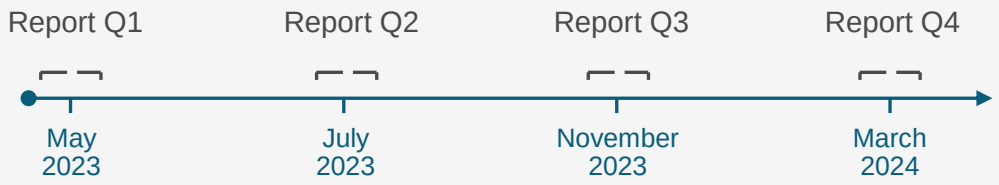
To check and track the behaviour and trends in the European electrical installation market. This is done 4 times per year, by means of phone interviews with registered electrical installation companies, divided over 7 major European markets.

THE RESEARCH TOPICS

Fixed part: Economic developments of the installation companies in Europe (order book and turnover development)

Quarterly theme topics in 2023:
Q1: Media orientation
Q2: Training needs
Q3: BIM
Q4: Purchase channels

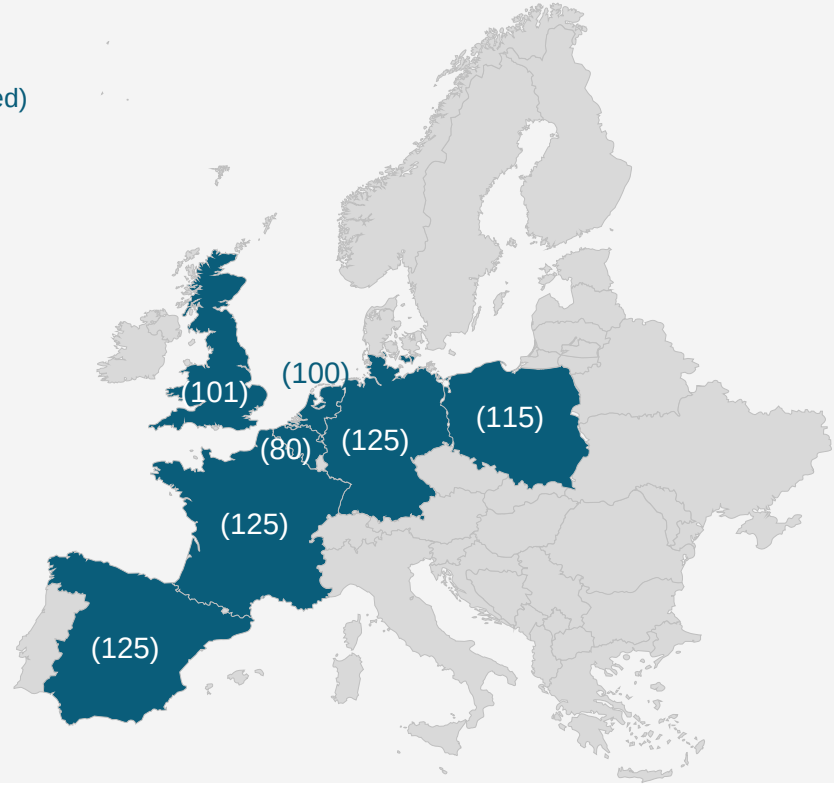
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

Background characteristics of the interviewed respondents can be found in the appendix



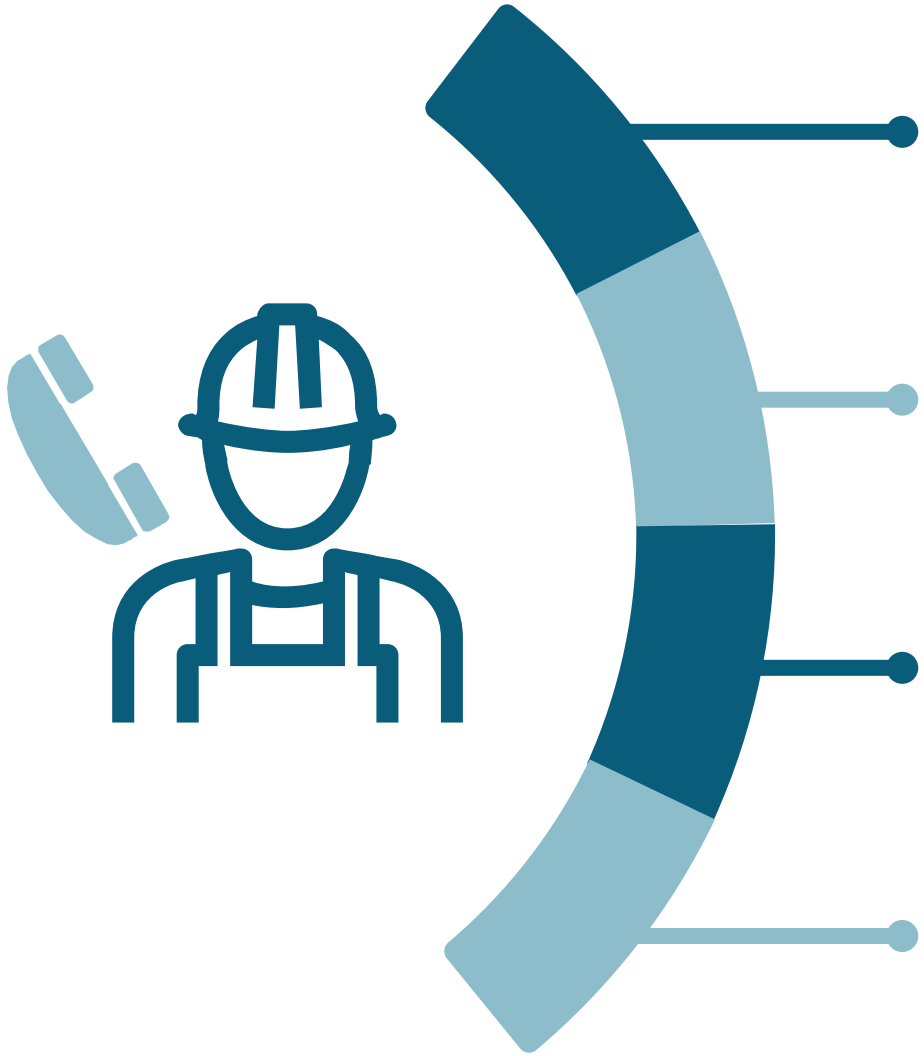
PROJECT TEAM

Maja Markovic
Project Manager
+31 682834333
m.markovic@usp-mc.nl

Valentino Vlahovic
Senior Research Analyst
-
vlahovic@usp-mc.nl

Dirk Hoogenboom
Research consultant
+31 652098924
hoogenboom@usp-mc.nl

About target group & methodology



Surveying electrical installation companies…

Interviewed companies need to provide electrical installation services, but they may also do other activities in addition (HVAC, plumbing, etc.). Most interviews are conducted with owners/ directors or purchasers of these companies.

… selected from a country-representative database

USP possesses an international database of electrical installation companies, which is constantly updated. Respondents are thus not part of a fixed panel; the sample varies from wave to wave.

… through phone interviews, by native-speaking agents

Phone surveys are the best approach for obtaining a sufficient sample, in order to provide insights that can be relied on. These phone calls are made by fixed fieldwork partners, located in the respective countries.

… weighting the results based on company size groups

Country results are weighted so that all three company size groups* have an equal influence on the total. As typically most interviews are conducted with small companies, we believe it is important to correct in order for big companies to have an equal impact on the ‘total’ results. This way the results are not heavily influenced by many smaller companies.

* **Group 1**: 1-4 FTE; **Group 2**: 5-14 FTE; **Group 3**: 15+ FTE

About the Q3 theme topic

Surveying the BIM topic…

Installation systems become more and more complex, different types of installation systems are often connected with each other and installers need to have knowledge about a broad range of installation systems. Besides that, on large scale building projects, installers need to work with several other parties who are involved in the building process. This makes clear communication and close cooperation essential. Building Information Modelling (BIM) is a concept that helps in this and is steadily gaining ground in (especially large and complex) building projects.

…allows for better insights in the awareness and usage of BIM and how installers can be supported on this area

To provide insights in this, we looked at this topic from various angles and mapped out:

- The familiarity with and (potential) usage of BIM;
- For which products/ application areas BIM is used;
- Reasons for not using BIM (yet);
- The relevance of several BIM features for installation companies;
- Perceived advantages and limitations of BIM;
- Installers' expectations towards manufacturers regarding BIM.

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Key takeaways

1

Business Development

__Important__: All quantitative data in this report was obtained during governmental COVID-19-related restrictions in the respective countries.

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Turnover balances

Negative | Positive

Netherlands	Q3-23	20%
	Exp. Q4-23	20%
Germany	Q3-23	20%
	Exp. Q4-23	20%
Spain	Q3-23	20%
	Exp. Q4-23	20%
Belgium	Q3-23	20%
	Exp. Q4-23	20%
France	Q3-23	20%
	Exp. Q4-23	20%
UK	Q3-23	20%
	Exp. Q4-23	20%
Poland	Q3-23	20%
	Exp. Q4-23	20%

Key takeaways

2

BIM

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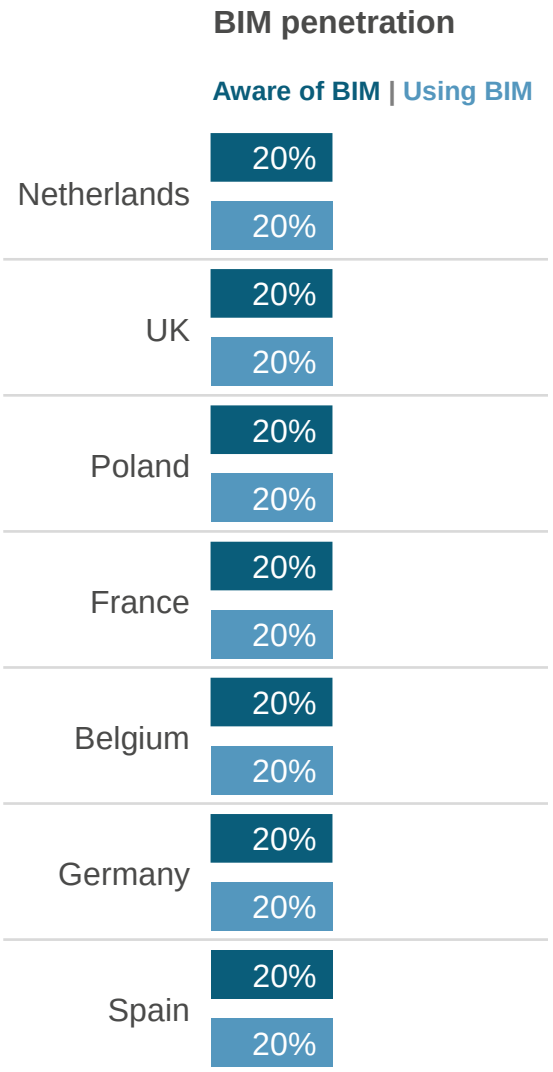

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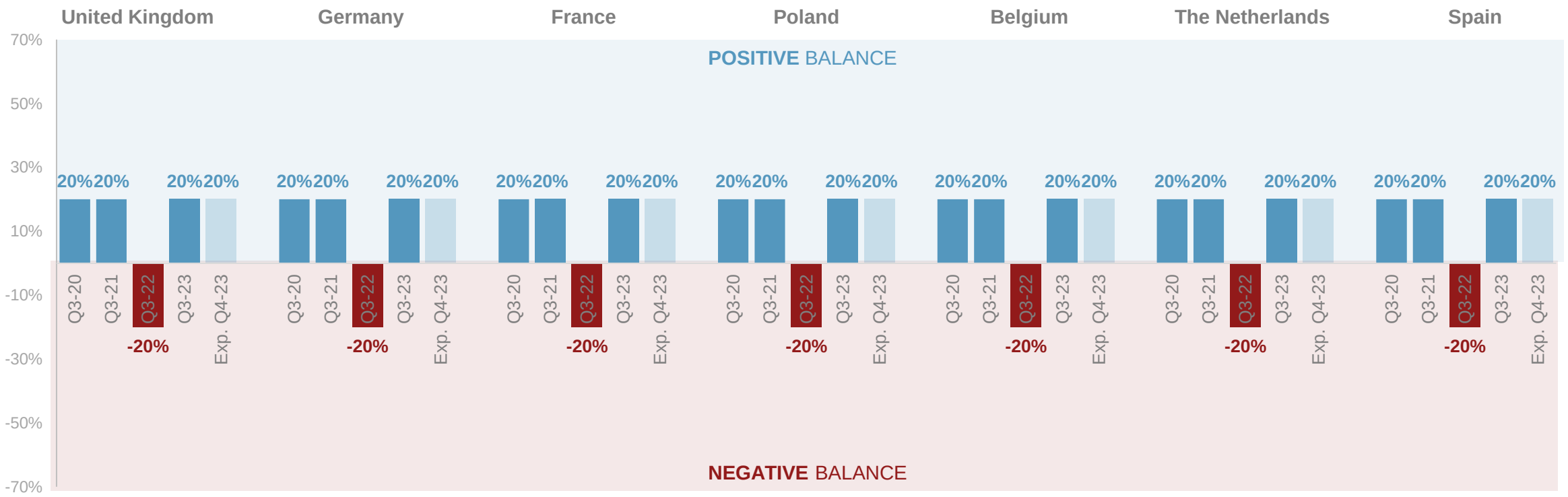
Turnover balance

Q: If you compare your turnover of Q3-21 to the same quarter last year, how did your turnover develop?

(% INCREASE minus % DECREASE)



Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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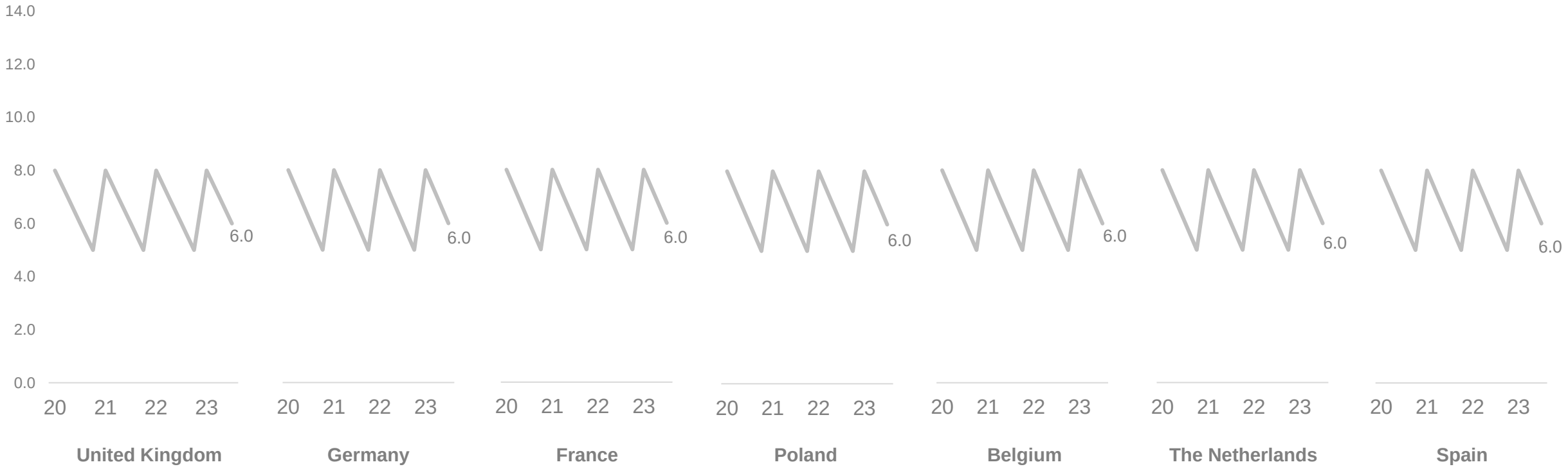
Order book portfolio

Q: How big is your current order book portfolio? For how many months will you be able to keep your current staff working?

(MONTHS)



Important: The 2020 and 2021 data was obtained while governmental COVID-19-related restrictions were in effect in the respective countries.

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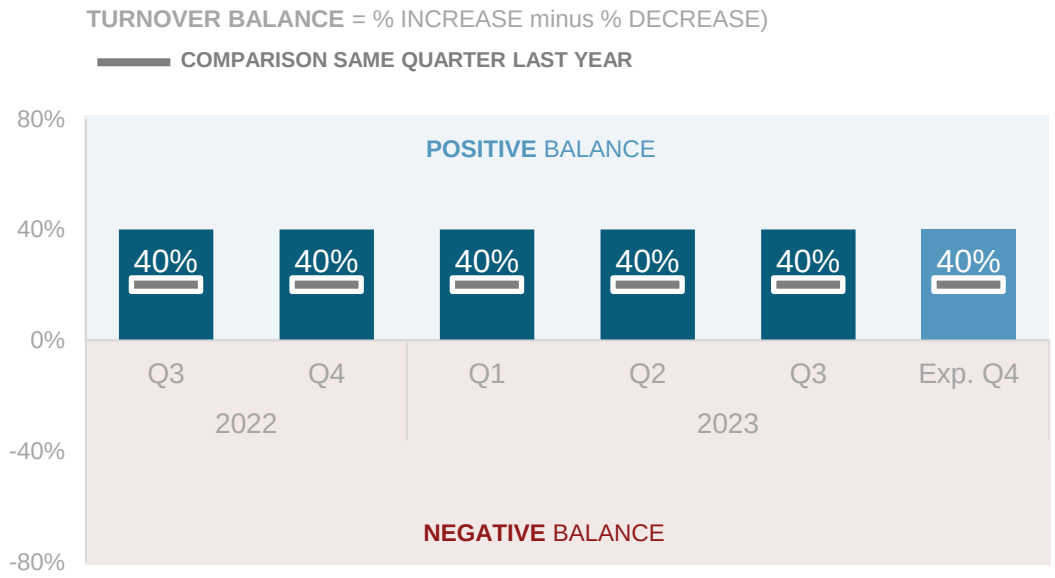
Turnover balance

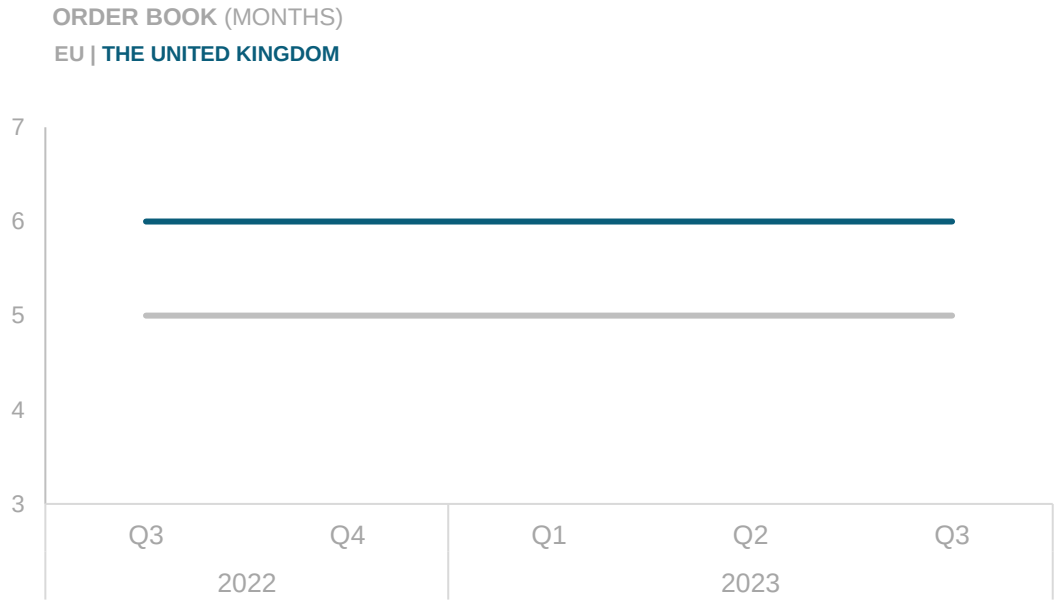
Q: If you compare your turnover of Q3-21 to the same quarter last year, how did your turnover develop? What are your expectations for the development in Q4-21?



Detailed information regarding the turnover distribution can be found in the appendix.

Order book portfolio

Q: How big is your current order book portfolio?



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- In the theme part of Q3 2023, special attention is paid to **BIM**.

- Installation systems become more and more complex, different types of installation systems are often connected with each other and installers need to have knowledge about a broad range of installation systems. Besides that, on large scale building projects, installers need to work with several other parties who are involved in the building process. This makes clear communication and close cooperation essential. Building Information Modelling (BIM) is a concept that helps in this and is steadily gaining ground in (especially large and complex) building projects.

- This chapter will give insight into installers' awareness, experiences and visions regarding BIM.

- The following topics will be discussed in this chapter:
  - The familiarity with and (potential) usage of BIM;
  - For which products/ application areas BIM is used;
  - Reasons for not using BIM (yet);
  - The relevance of several BIM features for installation companies;
  - Perceived advantages and limitations of BIM;
  - Installers' expectations towards manufacturers regarding BIM.

- After this introduction, a cross-country summary will be given, comparing the countries next to each other on the main findings of the BIM topic. The chapter after that, will give insights into the usage of BIM on a European level; i.e. the results of the seven countries combined on a total level. The results on this total level are weighted by the number of installation companies within a country. After that, the results per country will be elaborated on a more detailed level.

USP

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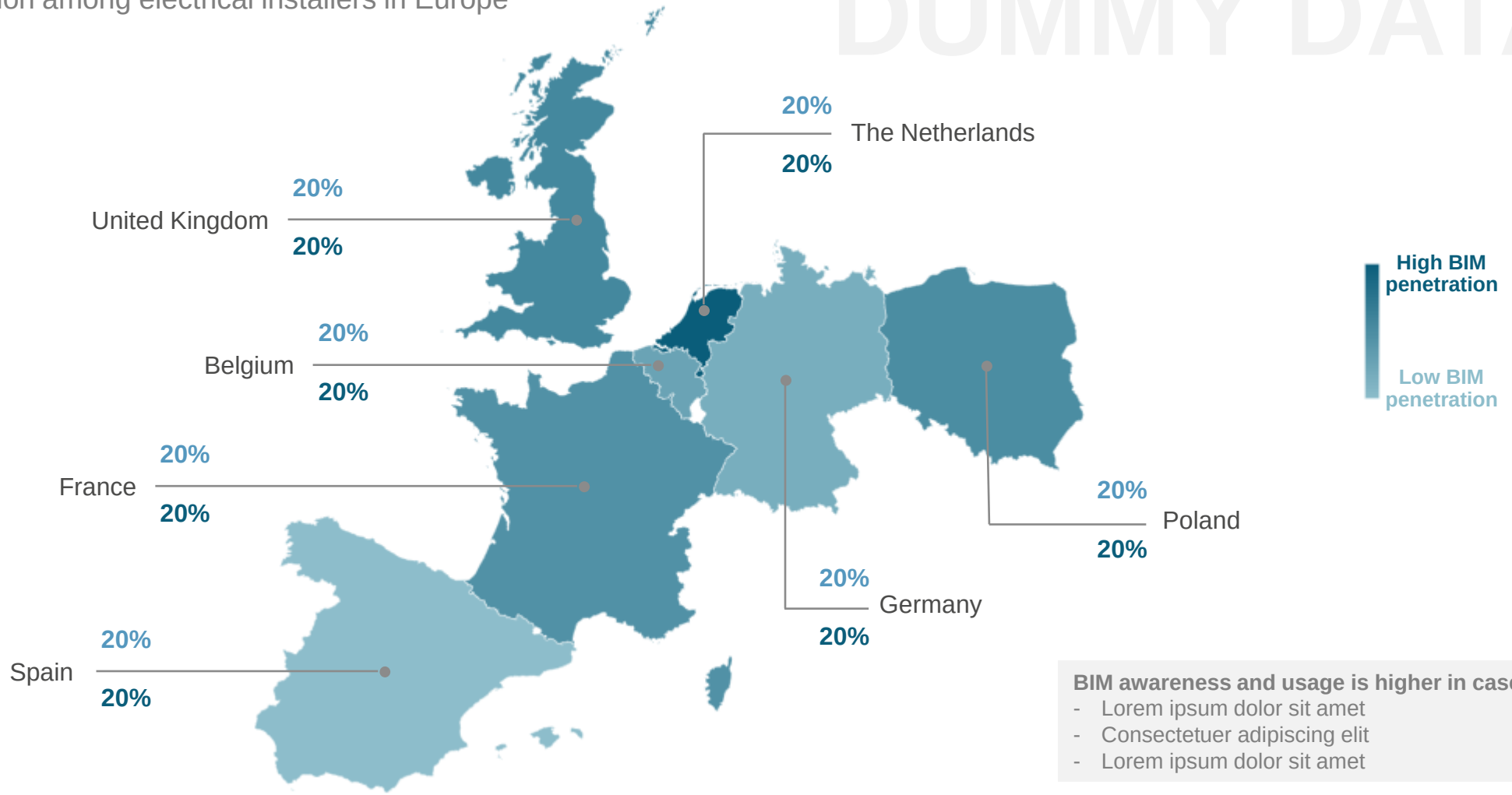
BIM penetration among electrical installers in Europe

Aware of BIM

Using BIM



BIM awareness and usage is higher in case of:

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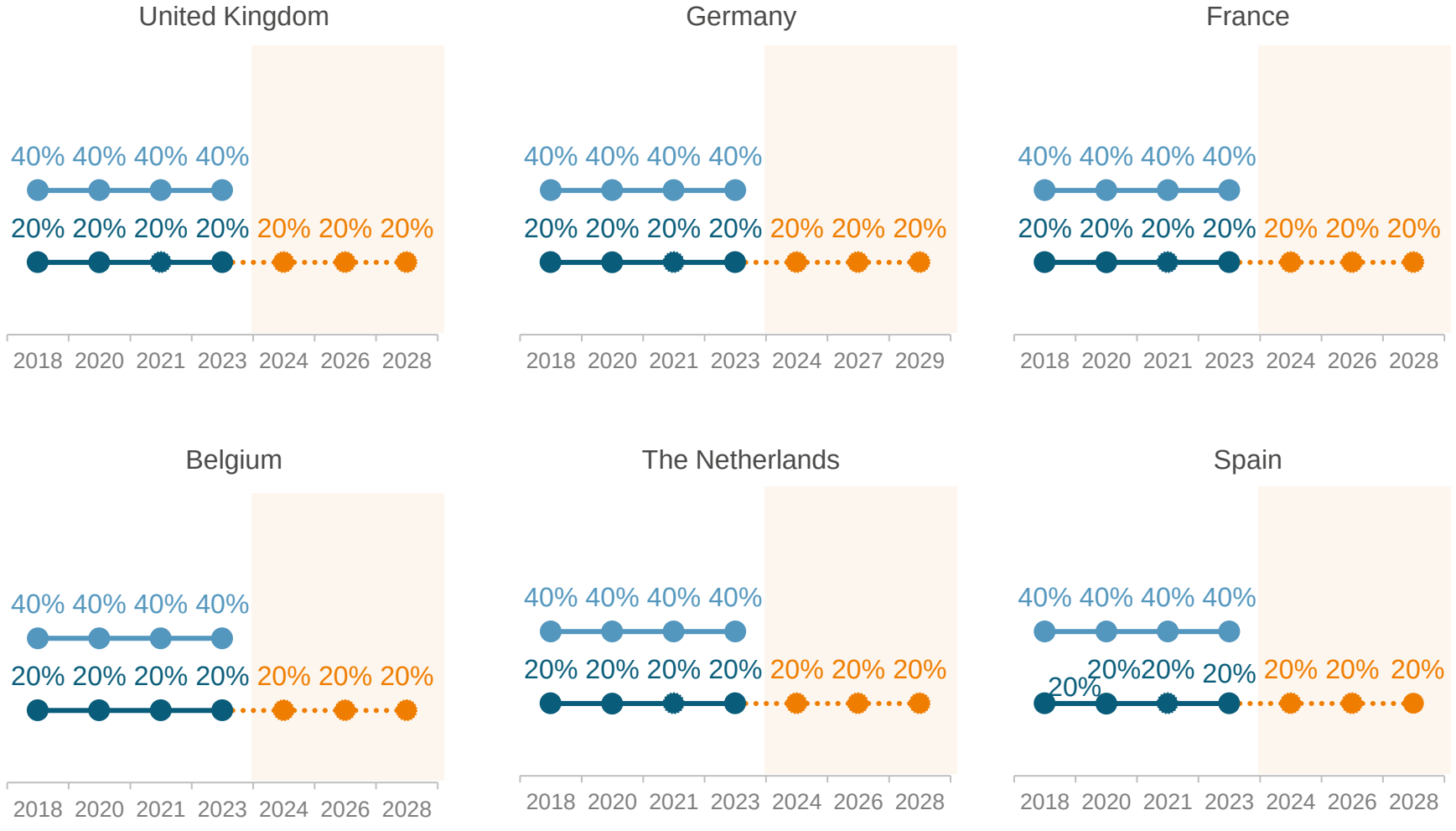
BIM awareness and usage over time

BIM awareness
BIM usage

Expected percentage of BIM users



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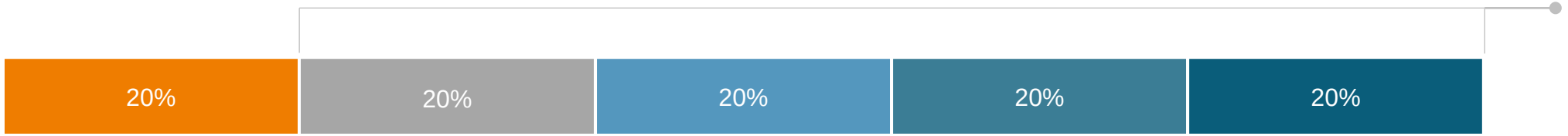
Familiarity with BIM

Q: Are you familiar with BIM, and if so, how?

Not heard of it | **Heard of it, but not seen it yet** | **Already one project done in BIM** | **Work on increasingly more BIM projects** | **All projects are done in BIM**

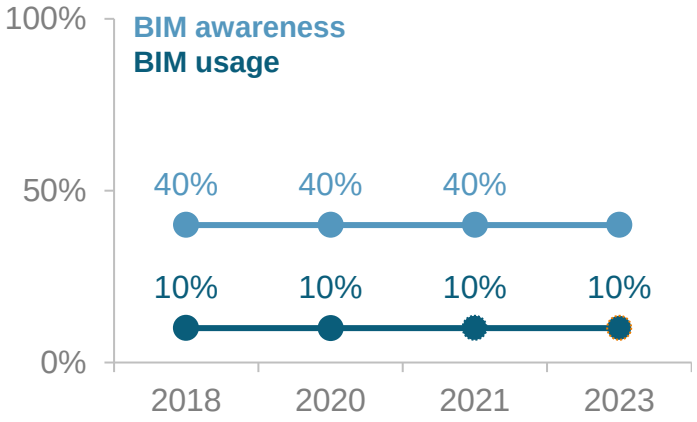


Base: n=825, all

BIM **awareness**
80%

BIM **usage**
60%

BIM awareness and usage (2018 – 2023)



Familiarity with BIM – by FTE

BIM unaware | **BIM-aware, non-user** | **BIM user**

Base: n=
…
…
…

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Reasons for not working with BIM (yet)

Q: Why is your organization not (yet) started with using BIM?

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Base: n=…, if familiar with BIM, but not working with BIM (yet)

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Companies having BIM software

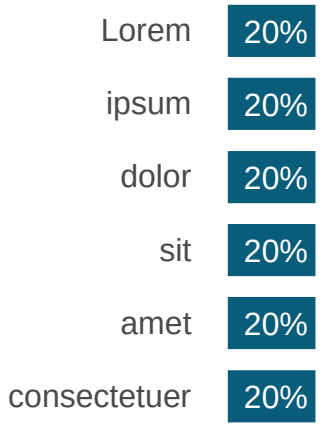
Q: Does your company have BIM software?

20% of the companies that work with BIM, **have BIM software**

Base: n=…, if using BIM

Used BIM software

Q: What BIM software platform do you/ your company use?



Base: n=…, if having BIM software

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Share of turnover coming from BIM projects

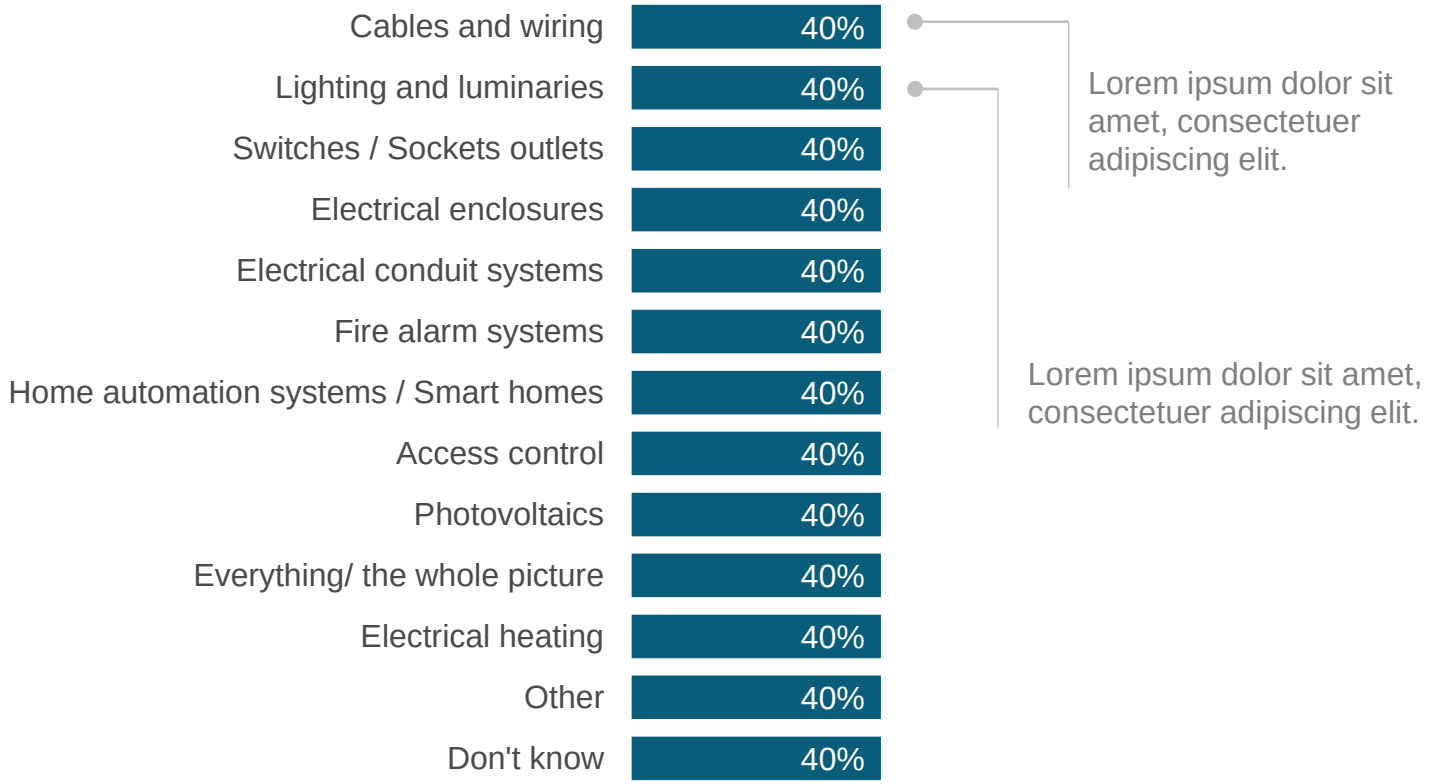
Q: What percentage of your turnover/ revenue comes from projects in which BIM is implemented?

20% of the **turnover** BIM users get from **BIM projects**

Base: n=…, if worked on multiple BIM projects.

BIM application

Q: For which electrical products/ application areas do you use BIM?



Base: n=…, if using BIM

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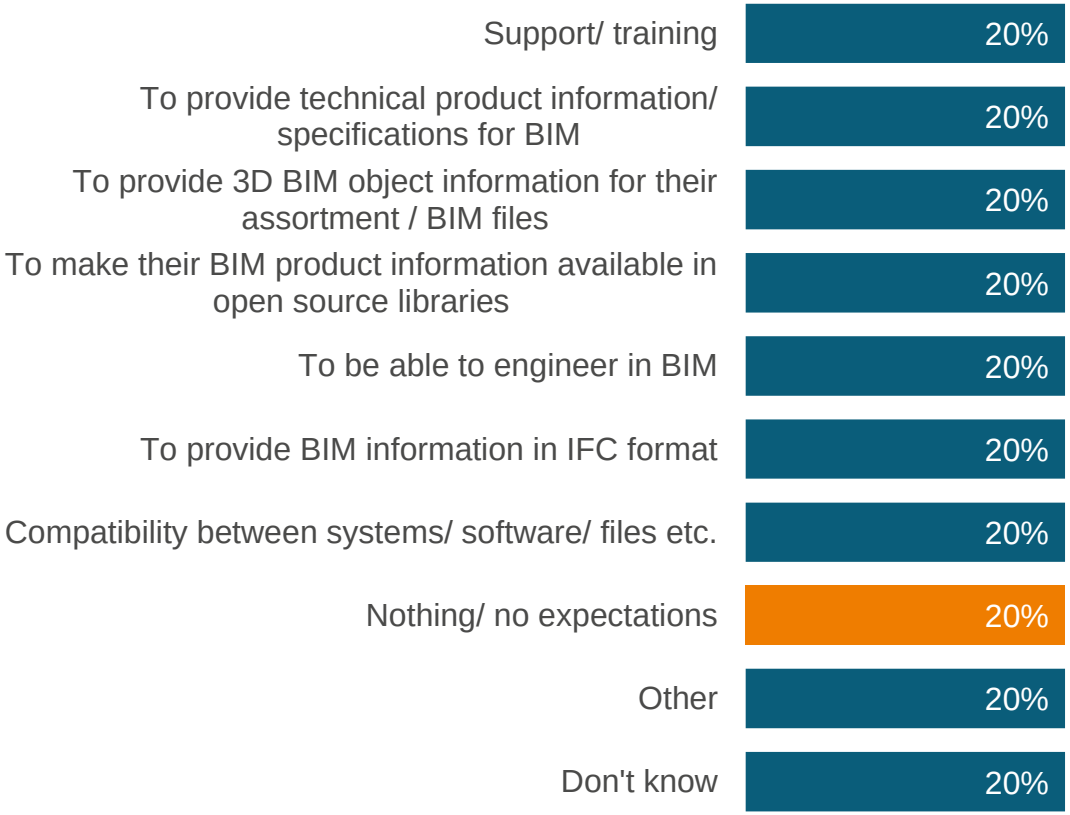
Expectations towards manufactures in relation to BIM

Q: What do you expect from the manufacturers of electrical products regarding BIM?



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Base: n=…, if at least heard of BIM

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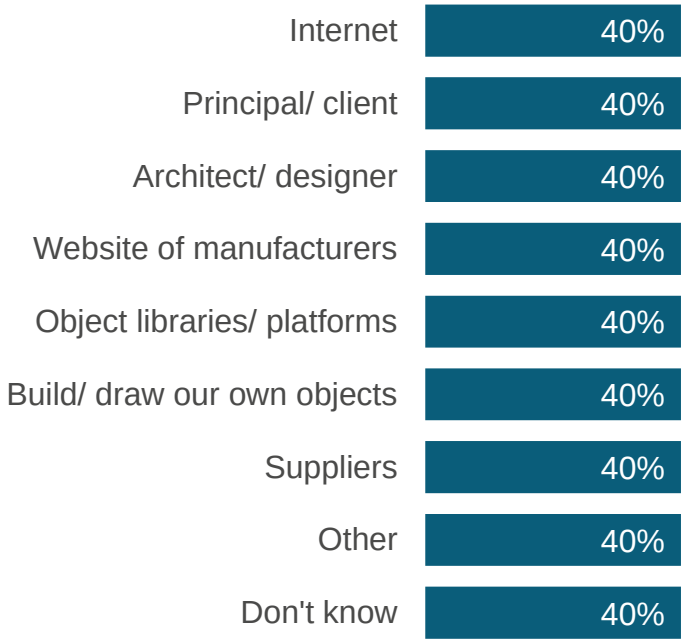
Main source of information

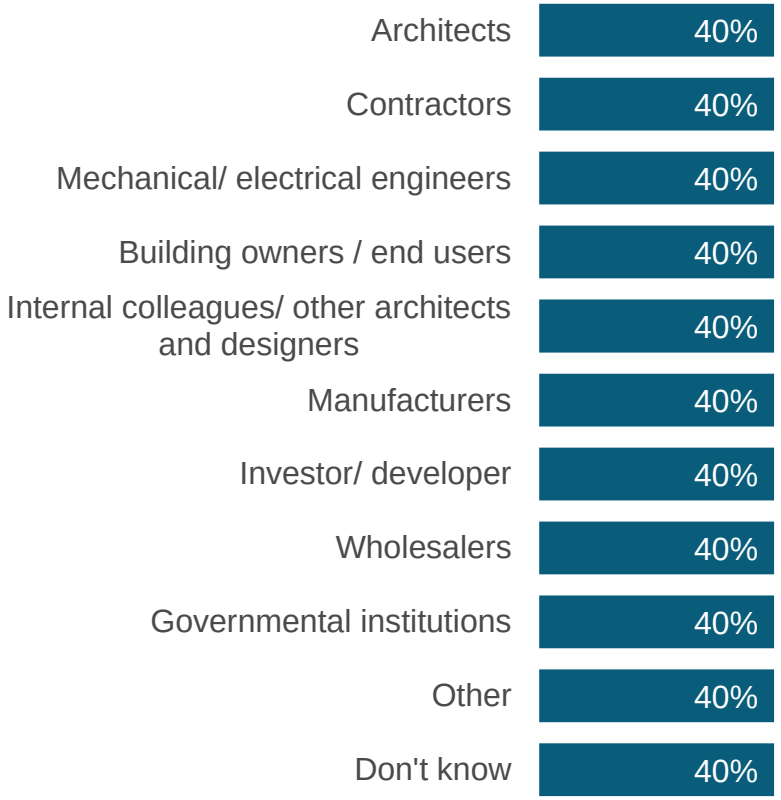
Q: Where do you mainly get the BIM information/ objects from?



Base: n=…, if using BIM

Main stakeholders

Q: With which stakeholders do you exchange data regularly?



Base: n=…, if using BIM

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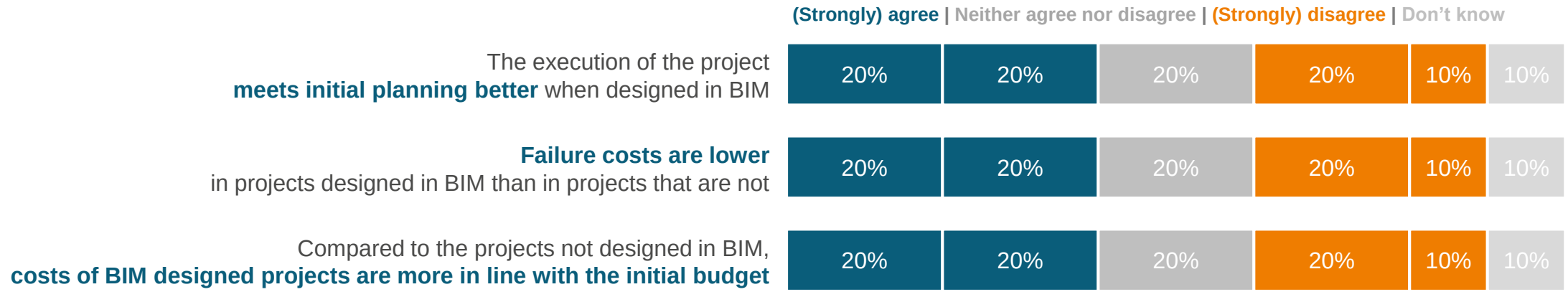
Attitudes towards BIM – BIM users

Q: To what extent do you agree or disagree with the following statements?



Base: n=…, if using BIM

Failure costs savings due to BIM usage

Q: Can you give a rough estimation how much percent the failure costs are lower, when projects are designed in BIM?

The **failure costs are** approximately **lower** when projects are **designed in BIM**

20%

Base: n=…, if (strongly) agree with statement

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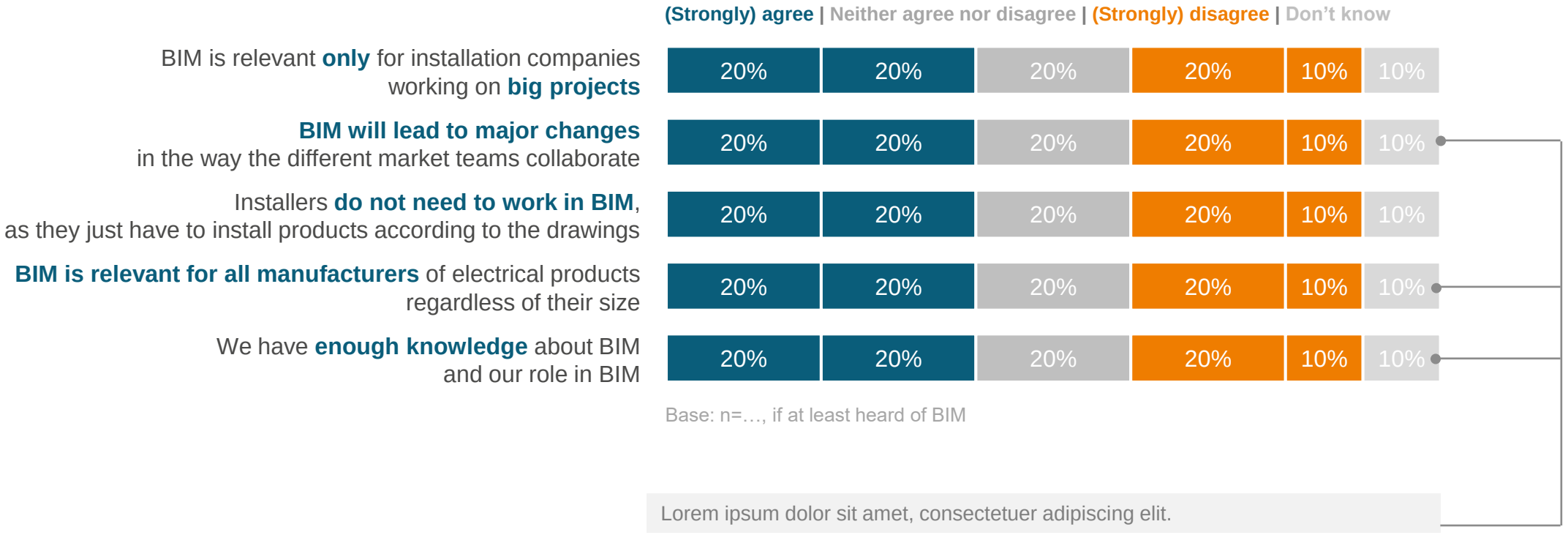
Attitudes towards BIM – users and non-users

Q: To what extent do you agree or disagree with the following statements?



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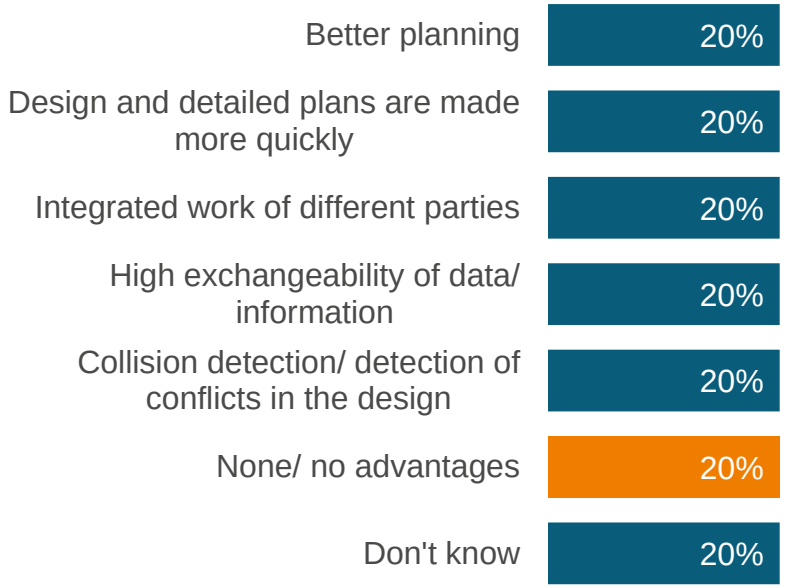
Perceived advantages of BIM

Q: What do you consider the greatest advantages of BIM?



Base: n=…, if at least heard of BIM

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Perceived limitations of BIM

Q: What do you consider the greatest limitations of BIM?

Base: n=…, if at least heard of BIM

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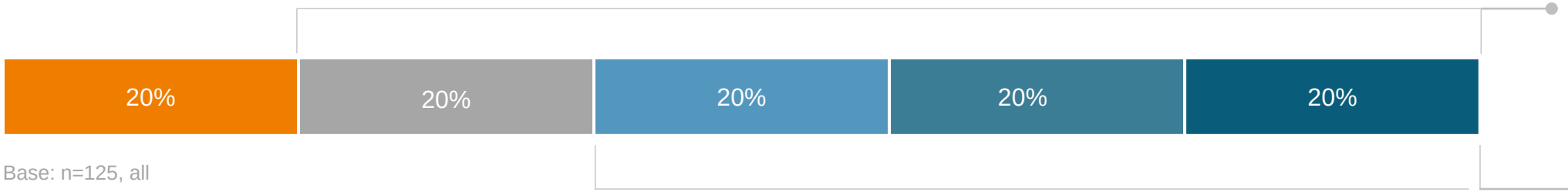
Familiarity with BIM

Q: Are you familiar with BIM, and if so, how?

Not heard of it | **Heard of it, but not seen it yet** | **Already one project done in BIM** | **Work on increasingly more BIM projects** | **All projects are done in BIM**



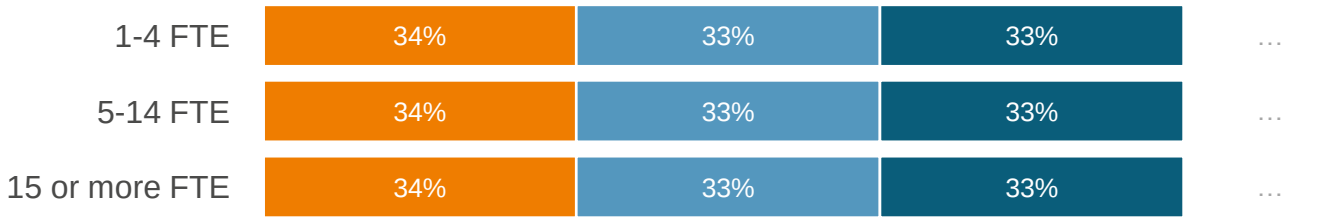
Base: n=125, all

BIM **awareness**
80%

BIM **usage**
60%

Familiarity with BIM – by FTE

BIM unaware | **BIM-aware, non-user** | **BIM user**



Base: n=

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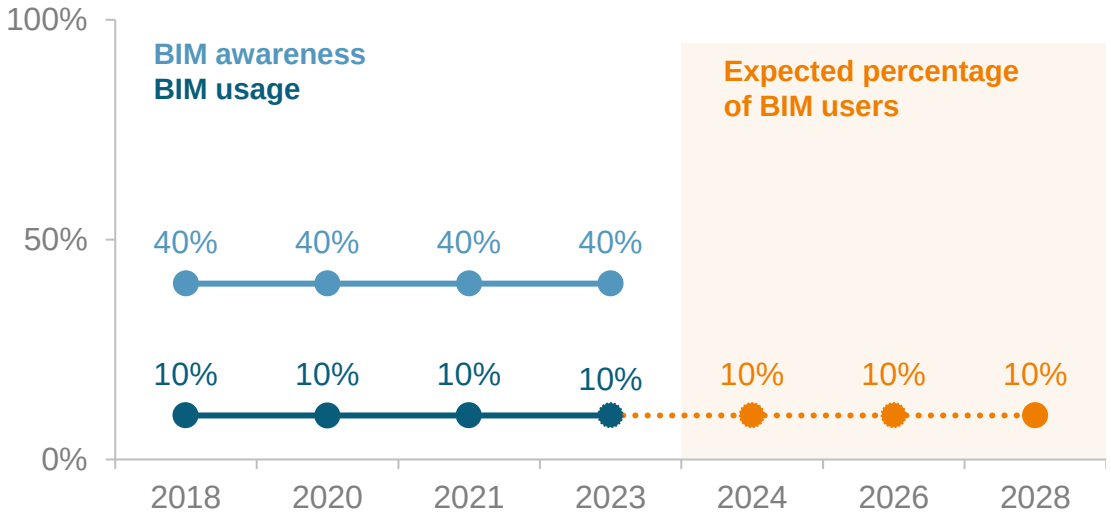
BIM awareness and usage over time



Expectations BIM usage

Q: How long do you think it will take for BIM to be widely used by installation companies, so more than 30% of the projects to be designed with BIM?

UK installers think that **BIM** will be **widely used** by installation companies in **2.0 years**

Base: n=..., if at least heard of BIM

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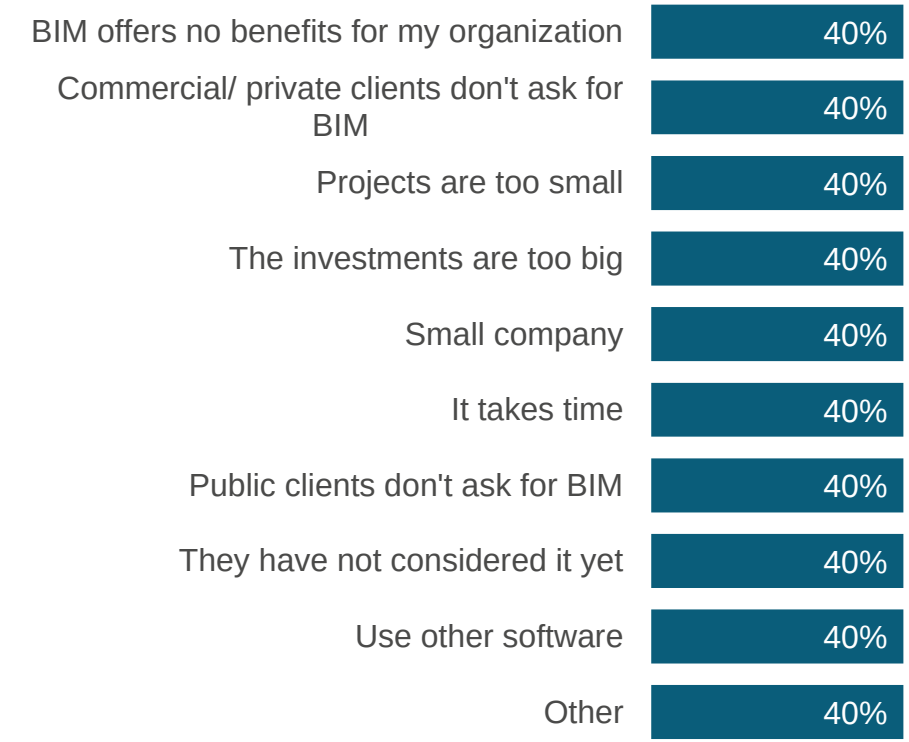
Reasons for not working with BIM

Q: Why is your organization not (yet) started with using BIM?



Base: n=…, if heard of BIM, but not working with BIM

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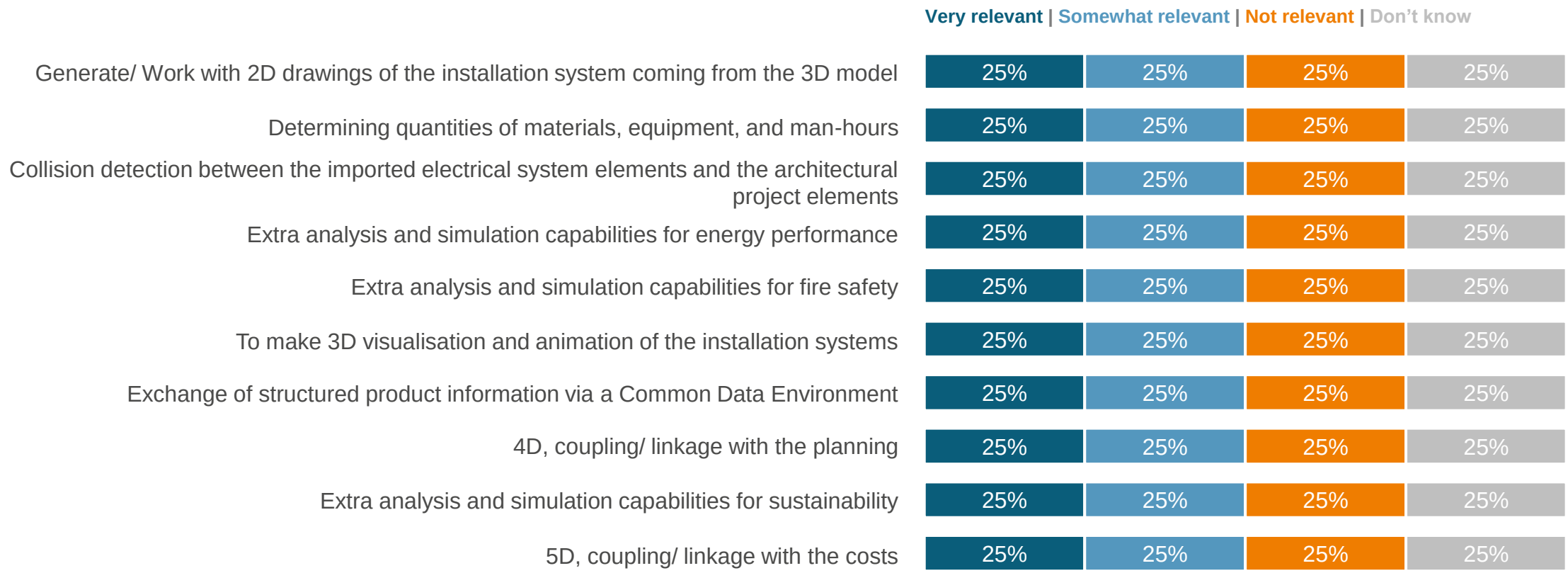
Relevance of BIM features

Q: Which of the following features of BIM do you think are most relevant for a company like yours?



Base: n=…, if at least heard of BIM

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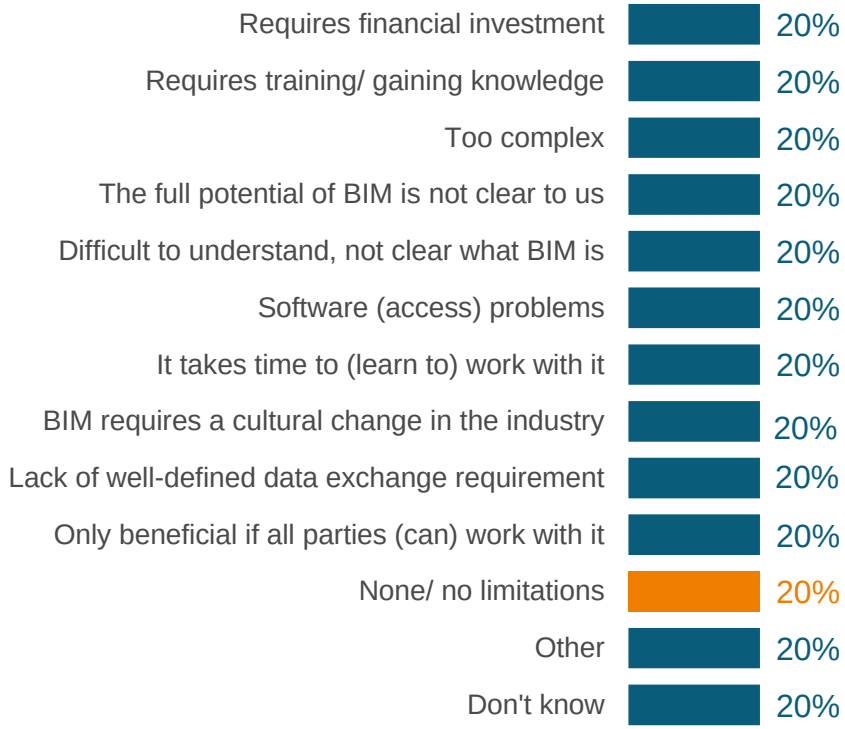
Advantages of BIM

Q: What do you consider the greatest advantages of BIM?

Base: n= …, if at least heard of BIM

Limitations of BIM

Q: What do you consider the greatest limitations of BIM?



Base: n= …, if at least heard of BIM

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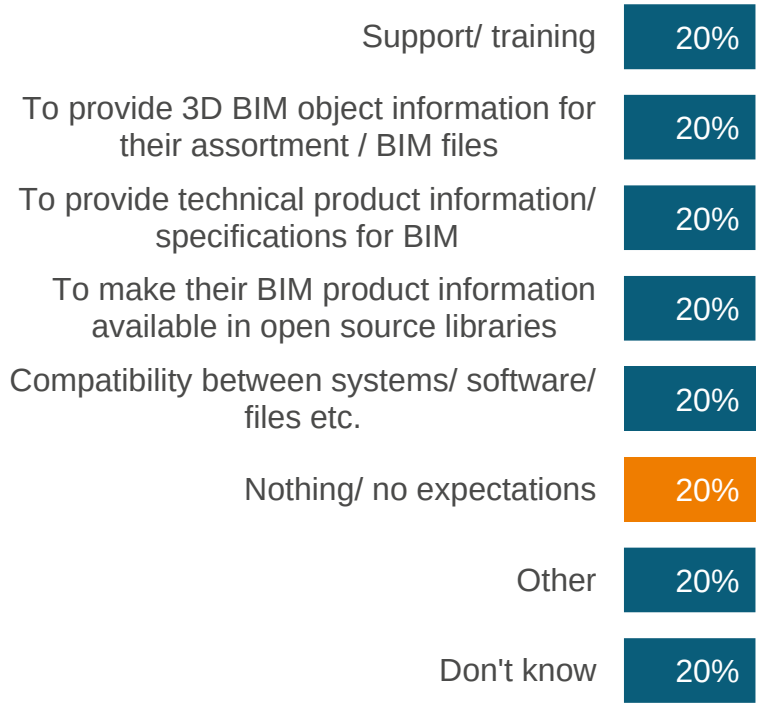
Expectations towards manufactures in relation to BIM

Q: What do you expect from the manufacturers of electrical products regarding BIM?



Base: n= …, if at least heard of BIM

Stop working with manufacturers if not BIM-ready

Q: Could you imagine that you would stop working with certain manufacturers, because they are not BIM-ready?

Yes | **Maybe** | **No** | **Don't know**

Base: n= …, if at least heard of BIM

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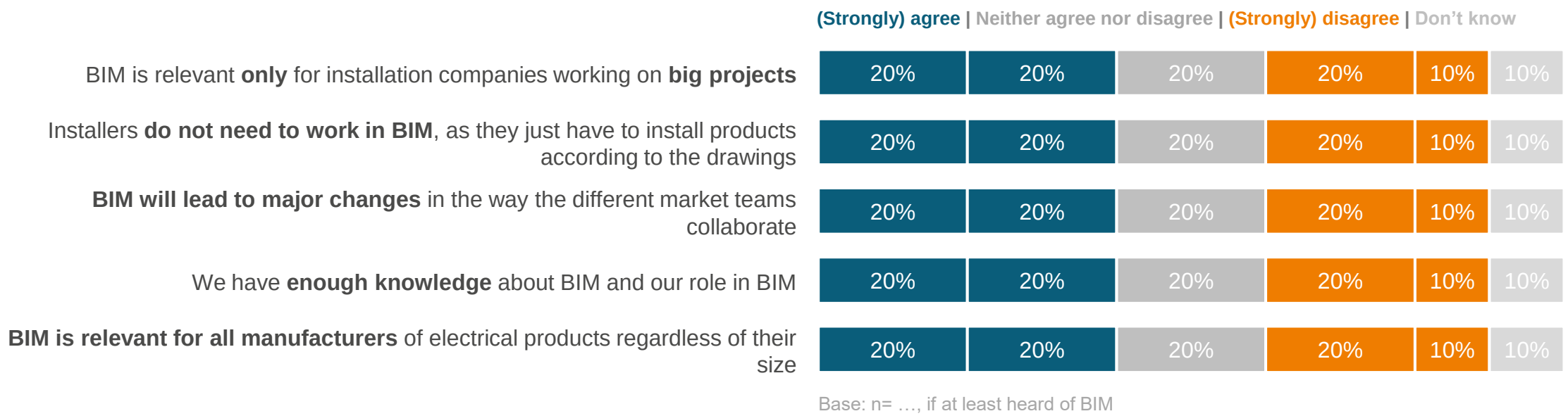
Attitudes towards BIM

Q: To what extent do you agree or disagree with the following statements?



Base: n= …, if at least heard of BIM

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Respondents' background characteristics

Job title of the interviewed respondents and the **company size**

Q: What is your position within the company?
Q: Yourself included, how many fulltime employees does your company have in total, in all branches?

	UK	Germany	France	Poland	Belgium	Netherlands	Spain
Owner / director / manager	50%	50%	50%	50%	50%	50%	50%
Project manager	50%	50%	50%	50%	50%	50%	50%
Engineer / designer	50%	50%	50%	50%	50%	50%	50%
Installer	50%	50%	50%	50%	50%	50%	50%
Calculator / work planner	50%	50%	50%	50%	50%	50%	50%
Purchaser	50%	50%	50%	50%	50%	50%	50%
1 - 4 FTE	50%	50%	50%	50%	50%	50%	50%
5 - 14 FTE	50%	50%	50%	50%	50%	50%	50%
15+ FTE	50%	50%	50%	50%	50%	50%	50%

Q3 2023 data, unweighted

Questionnaire – theme questions

- Are you familiar with BIM, and if so, how?
- Does your company have BIM software?
- What BIM software platform do you/ your company use?
- What percentage of your turnover/ revenue comes from projects in which BIM is implemented?
- Why is your organization not (yet) started with using BIM?
- Does your company have any plans to start working with BIM?
- How long do you think it will take for BIM to be widely used by installation companies, so more than 30% of the projects to be designed with BIM?
- For which electrical products/ application areas do you use BIM?
- Where do you mainly get the BIM information/ objects from?
- With which stakeholders do you exchange data regularly?

Questionnaire – theme questions

- Which of the following features of BIM do you think are most relevant for a company like yours?
  - Generate/ Work with 2D drawings of the installation system coming from the 3D model
  - To make 3D visualisation and animation of the installation systems
  - Determining quantities of materials, equipment, and man-hours
  - Collision detection between the imported electrical system elements and the architectural project elements
  - 4D, coupling/ linkage with the planning
  - 5D, coupling/ linkage with the costs
  - Extra analysis and simulation capabilities for energy performance
  - Extra analysis and simulation capabilities for fire safety
  - Extra analysis and simulation capabilities for sustainability
  - Exchange of structured product information via a Common Data Environment
- What do you consider the greatest advantages of BIM?
- What do you consider the greatest limitations of BIM?
- What do you expect from the manufacturers of electrical products regarding BIM?
- Could you imagine that you would stop working with certain manufacturers, because they are not BIM-ready?

Questionnaire – theme questions

- To what extent do you agree or disagree with the following statements?
  - Installers do not need to work in BIM, as they just have to install products according to the drawings
  - BIM will lead to major changes in the way the different market teams collaborate
  - BIM is relevant only for installation companies working on big projects
  - BIM is relevant for all manufacturers of electrical products regardless of their size
  - We have enough knowledge about BIM and our role in BIM
  - Failure costs are lower in projects designed in BIM than in projects that are not
  - Costs of BIM designed projects are more in line with the initial budget then projects not designed in BIM
  - The execution of the project meets initial planning better when designed in BIM

- Can you give a rough estimation how much percent the failure costs are lower, when projects are designed in BIM?

About USP

USP Marketing Consultancy

Head office

Subsidiary

Rotterdam

Düsseldorf

Total
70

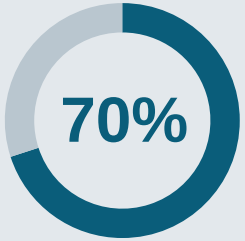
Market specialist
installation, construction, home improvement and real estate

Dedicated and multi-client research

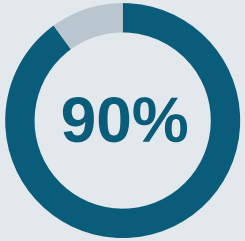
Active in the market for over 25 years

230+ dedicated market research projects annually

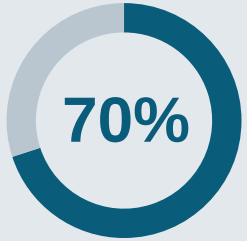
Revenue distribution



turnover coming from **international projects**



turnover coming from **dedicated market research**, 10% from multi client



turnover coming from **B2B**, 30% B2C

Research in
34
countries annually

78
focus groups

1,162
in-depth interviews

58,653
B2B CATI interviews

56,750
B2C online interviews

What we do

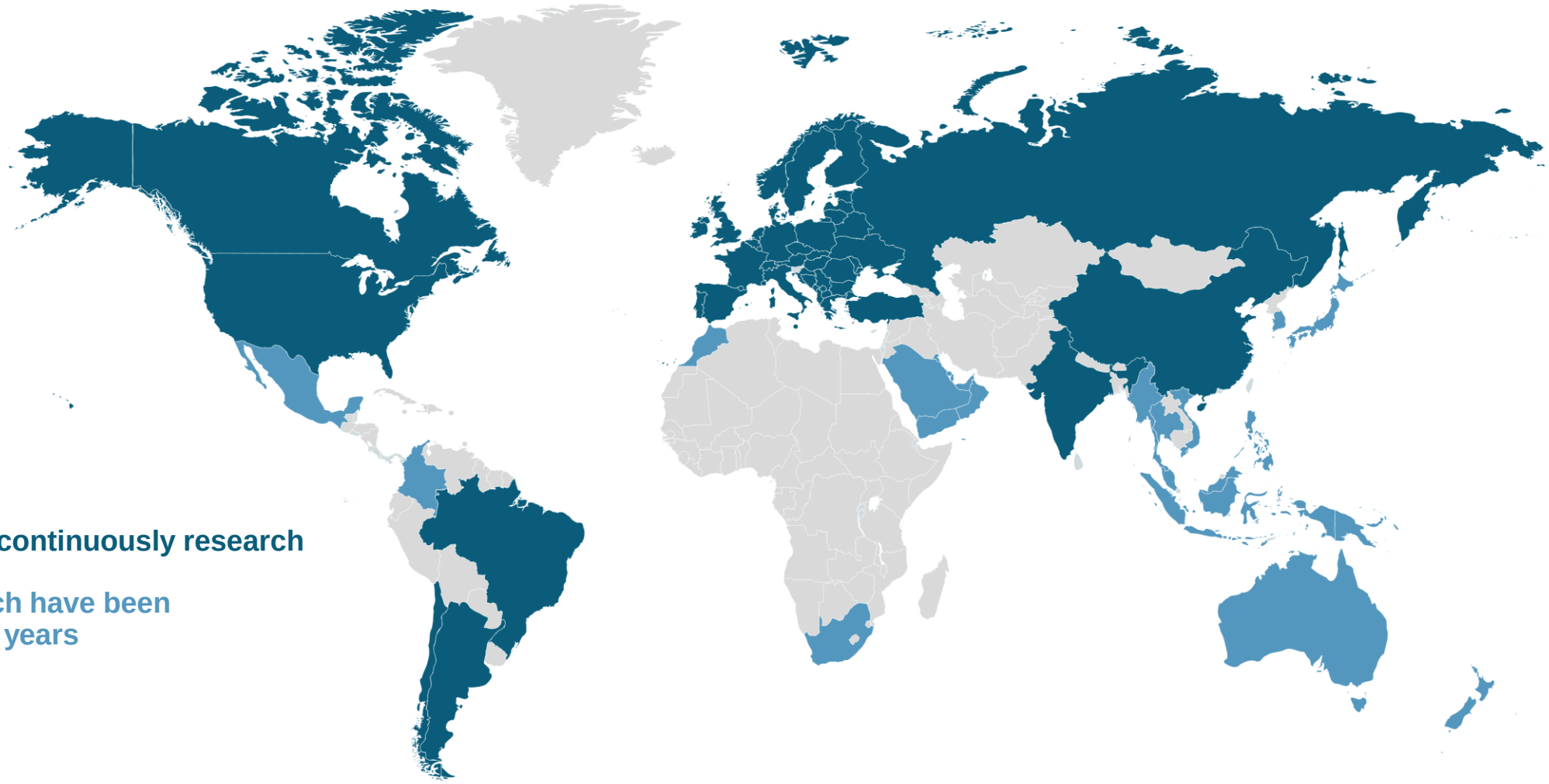
Examples

- Segmentation
- Customer journey
- Branding
- Concept/ product research
- Customer satisfaction
- Trends
- Distribution research
- Market exploration
- Pricing
- Market size

Dedicated market research

- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitive research or a combination of both
- Within our market specialism, all types of researches can be conducted
- Targeting the right audience, with the right questions at the right time.

We are active globally



Countries which we continuously research

Other countries which have been researched in past 2 years

Principals of USP

Our multi-client research monitors

	European **Architectural** Barometer	European **Contractor** Monitor	European **Mechanical Installation** Monitor	European **Electrical Installation** Monitor	European **Painter Insight** Monitor	European **Home Improvement** Monitor
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers
Methodology						
Annual sample size	5,800 interviews	2,050 interviews	3,200 interviews	3,800 interviews	2,300 interviews	26,400 interviews
Country scope	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden • Austria
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly
2020 Theme topics	• Q1: Media orientation & consumption • Q2: Shifts in building methods • Q3: City of the future • Q4: Circularity & sustainability	• H1: Circularity & sustainability • H2: Decision-making	• Q1: BIM & calculation tools • Q2: Prefab • Q3: DMU • Q4: Media orientation & consumption	• Q1: Electrification • Q2: Certification & circularity • Q3: Services in installation sector • Q4: Pricing	• Trend tracking • Sustainability • Labour shortage • Online buying • Future expectations • Innovation needs	• Q1: Orientation & smart homes • Q2: Purchase channels • Q3: Branding (A vs. Private) • Q4: DIFM vs. DIY

USP Marketing Consultancy