European mechanical installation monitor Q1 2022

BIM - Building Information Modelling

May 2022

A product by USP Marketing Consultancy

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About European Mechanical Installation Monitor

THE GOAL

To check and track the behaviour and trends in the European Mechanical installation market. This is done 4 times per year, by means of 650 phone interviews (per quarter) with registered HVAC installation companies and plumbers, divided over 6 major European markets.

THE RESEARCH TOPICS

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

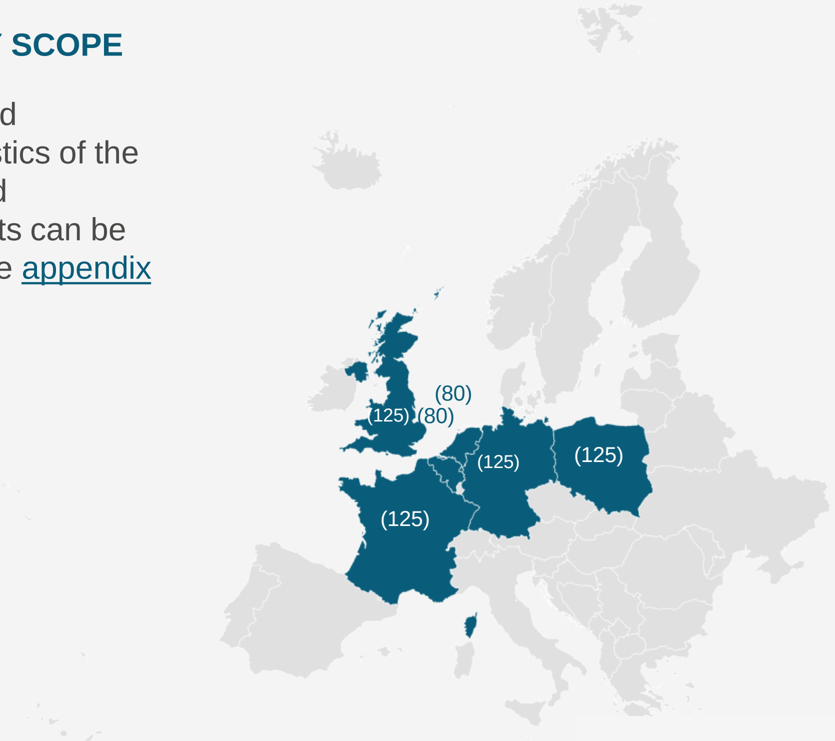
Quarterly theme topics in 2022:
Q1: BIM
Q2: Prefab
Q3: Smart buildings and products
Q4: Media orientation

THE TIMELINE

Report Q1	Report Q2	Report Q3	Report Q4
May 2022	August 2022	November 2022	February 2023

COUNTRY SCOPE

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



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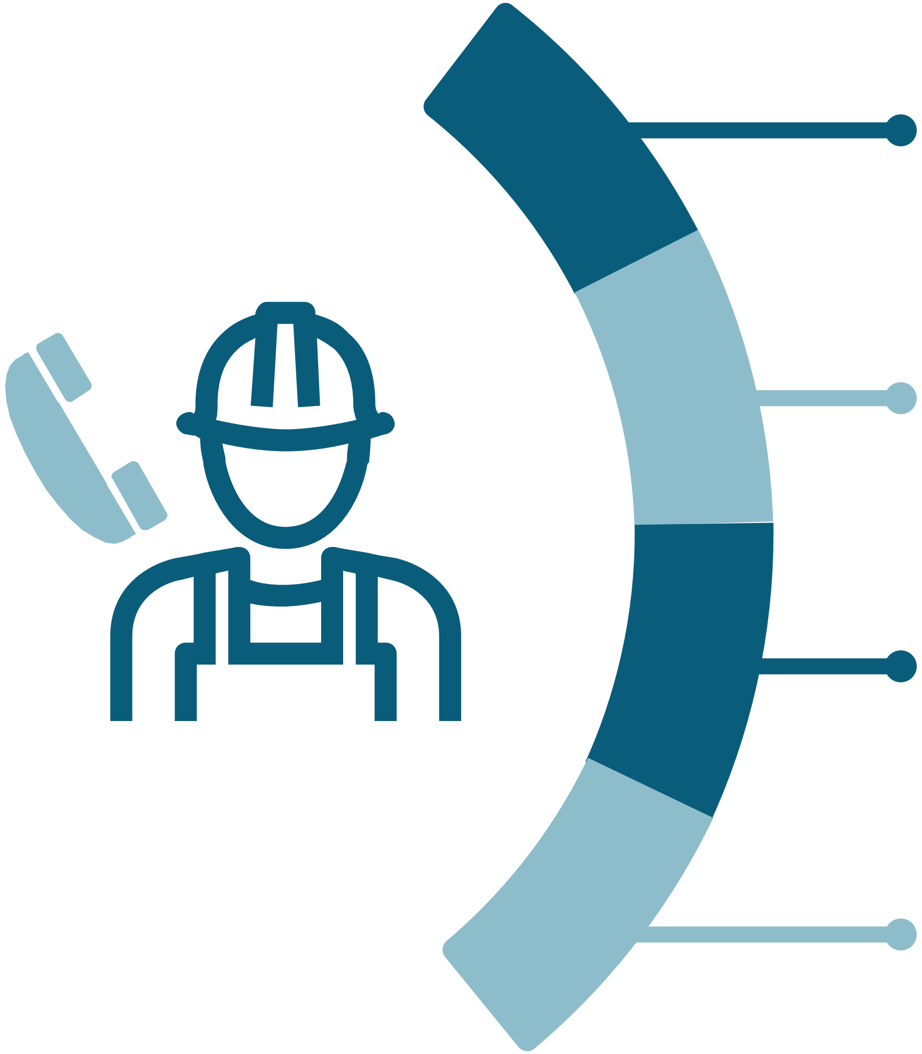
About target group & methodology



Surveying HVAC installation companies…

Interviewed companies need to provide HVAC installation services, but they may also do other activities in addition (Electrical installation 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 HVAC 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 number of interviews, in order to provide insights that can be relied on. These phone interviews are conducted 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 most interviews are typically conducted with small companies, we believe it is important to correct in order for large 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

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Key takeaways

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Business Development

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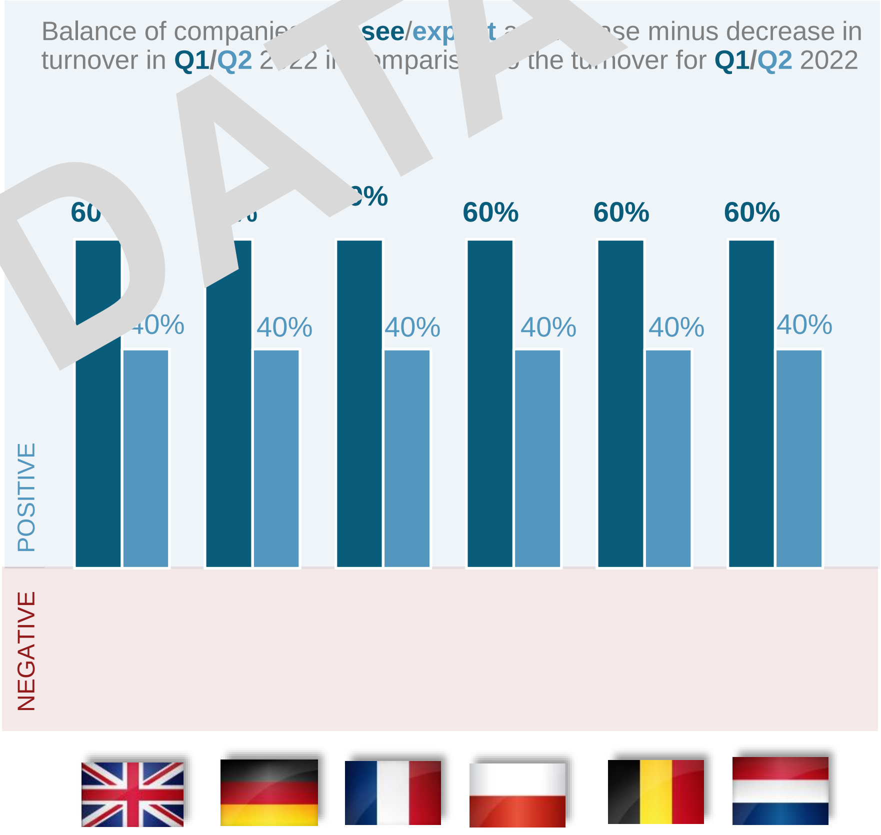
Turnover balance of installers Q1 and Q2 2022



Key takeaways

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Theme: Building information modelling

BIM awareness is growing. The level of adoption is still low.

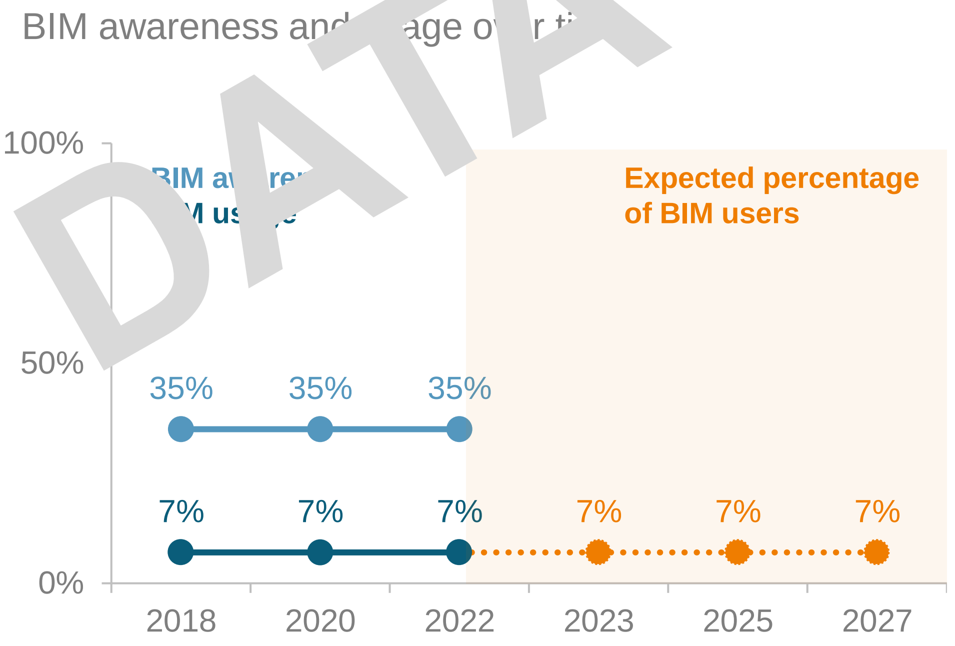
The usage of BIM among the European installation companies is growing slowly but surely. The increased awareness about BIM is already a positive trend. Dutch installers are the frontrunners in using BIM in their projects contributing to about 30% of all BIM users registered in this survey. In the Netherlands installers already have a high share of projects where BIM is becoming the standard (being used for all projects or for increasing number of projects they work on).

The bigger companies and the ones working on new build projects and non-residential projects generally have more experience in working with BIM.

The role of the installers working with BIM in two [illegible] includes the engineering of the installation systems [illegible] BIM software and using BIM objects. The latest are normally [illegible] the manufacturers websites or platforms/ open libraries with [illegible] installation companies working with BIM normally use [illegible] LOD of [illegible] or higher.

The potential of BIM [illegible] still to be discovered by the installers

The awareness with BIM is increasing, but the knowledge about BIM is still limited. Even among the [illegible] BIM is mainly used for creating 2D drawings and 3D visualisation, while other functionalities like quantity determination and clash control are used to a lesser degree. Following other professionals like architects and engineers, it can be expected that in the years ahead the installation industry will for sure discover more of the added values of BIM.



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Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	*125*	*125*	*136*	*125*	*100*	*100*
Heating installations	50%	50%	50%	50%	50%	50%
Hot & cold water installation	50%	50%	50%	50%	50%	50%
Installation of sanitary ware	50%	50%	50%	50%	50%	50%
Ventilation	50%	50%	50%	50%	50%	50%
Air conditioning and cooling	50%	50%	50%	50%	50%	50%

Other installation activities

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	*125*	*125*	*136*	*125*	*100*	*100*
Solar cells, solar collectors	50%	50%	50%	50%	50%	50%
Electrical installation	50%	50%	50%	50%	50%	50%
Home automation installation	50%	50%	50%	50%	50%	50%

Core HVAC activities		By company size: 1-4 FTE	5-14 FTE	15+ FTE
Heating installations	40%	40%	40%	40%
Installation of sanitary ware	40%	40%	40%	40%
Hot & cold water installation	40%	40%	40%	40%
Ventilation	40%	40%	40%	40%

Other activities		By company size: 1-4 FTE	5-14 FTE	15+ FTE
Electrical installation	40%	40%	40%	40%
Home automation installation	40%	40%	40%	40%
Solar cell, solar collectors installation	40%	40%	40%	40%

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Number of projects in Q1 2022 as a result of the war in Ukraine

Q: How many new projects has your company scored/ been commissioned in Q1 2022? How many projects have been postponed in Q1 2022?
In Q2 2022, how many projects were not started and cancelled?

	The United Kingdom		Germany		France		[illegible]		Belgium		The Netherlands	
	Share of companies	Avg. projects	Share of companies	Avg. projects	Share of companies	Avg. projects	[illegible]	[illegible]	Share of companies	Avg. projects	Share of companies	Avg. projects
New projects	50%	10	50%	10	[illegible]	[illegible]	50%	10	50%	10	50%	10
Postponed projects	50%	10	[illegible]	[illegible]	50%	10	50%	10	50%	10	50%	10
Not started or cancelled projects	50%	10	50%	10	50%	10	50%	10	50%	10	50%	10

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Impact of war in Ukraine on installers work

Q: Do you expect that the war in Ukraine will have any impact on your work and in what way?

	The United Kingdom	Germany	France	Poland	Belgium	The Netherlands
Materials will become more expensive	20%	20%	20%	20%	20%	20%
Materials will become more difficult to obtain	20%	20%	20%	[illegible]	20%	20%
We will need to increase our prices	20%	20%	[illegible]	20%	20%	20%
Projects will be postponed	20%	20%	[illegible]	20%	20%	20%
Projects will be cancelled	20%	20%	20%	20%	20%	20%
Fewer orders	20%	[illegible]	20%	20%	20%	20%
Energy prices will increase	[illegible]	[illegible]	20%	20%	20%	20%
More staff will be available	[illegible]	20%	20%	20%	20%	20%
No impact	[illegible]	20%	20%	20%	20%	20%

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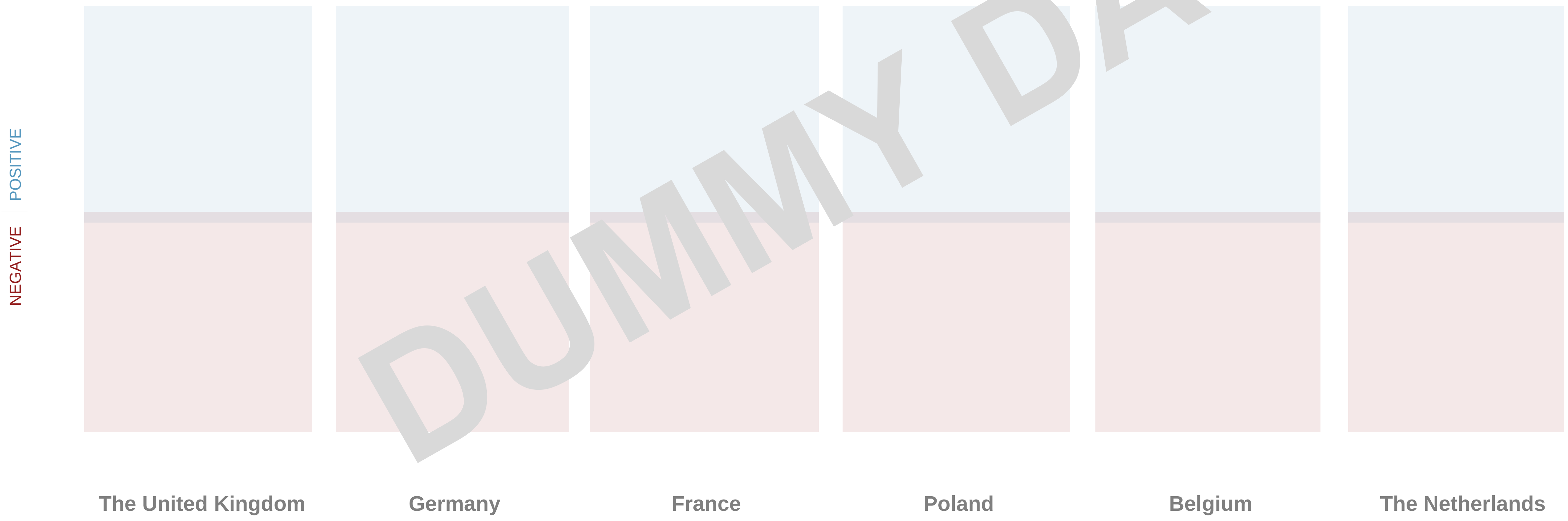
Turnover outlook last quarters and expectations for Q1 2022

TURNOVER BALANCE

(% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR



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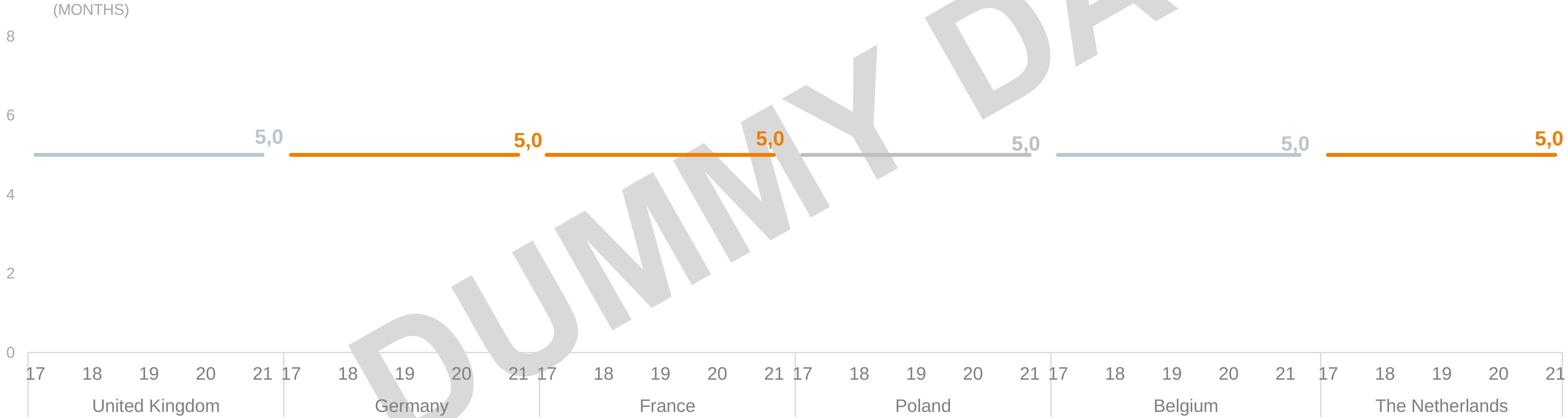
Order book portfolio

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



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Turnover outlook

If you compare your turnover of Q4-21 to Q4-21, how did your turnover develop? What are your expectations for the development in Q1-22?

TURNOVER BALANCE (% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR

Order book portfolio

How big is your current order book portfolio?

ORDER BOOK (MONTHS)

EU | THE UNITED KINGDOM

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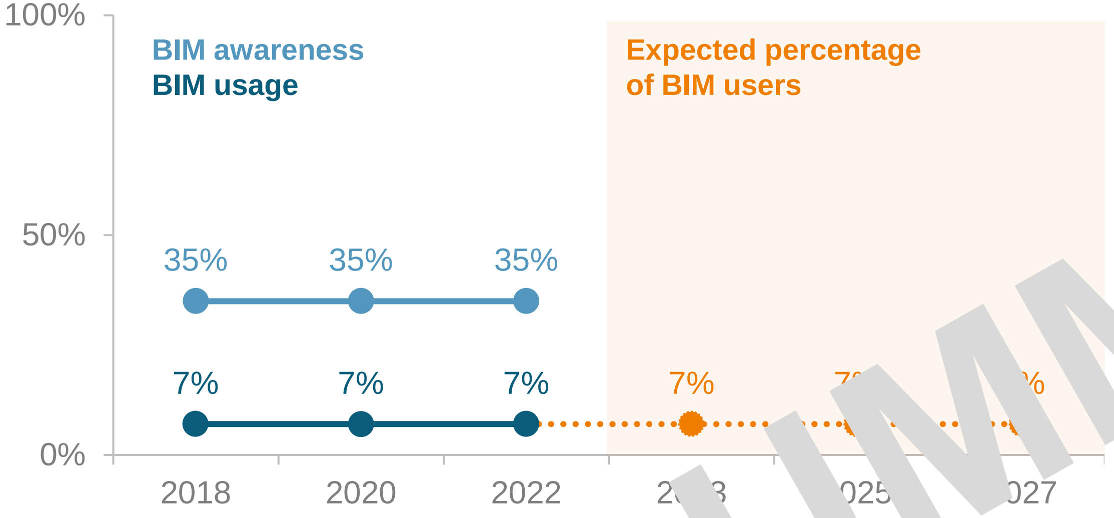
BIM awareness and usage over time



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?

European installers think that **BIM will be widely used** by installation companies in **XY years.**

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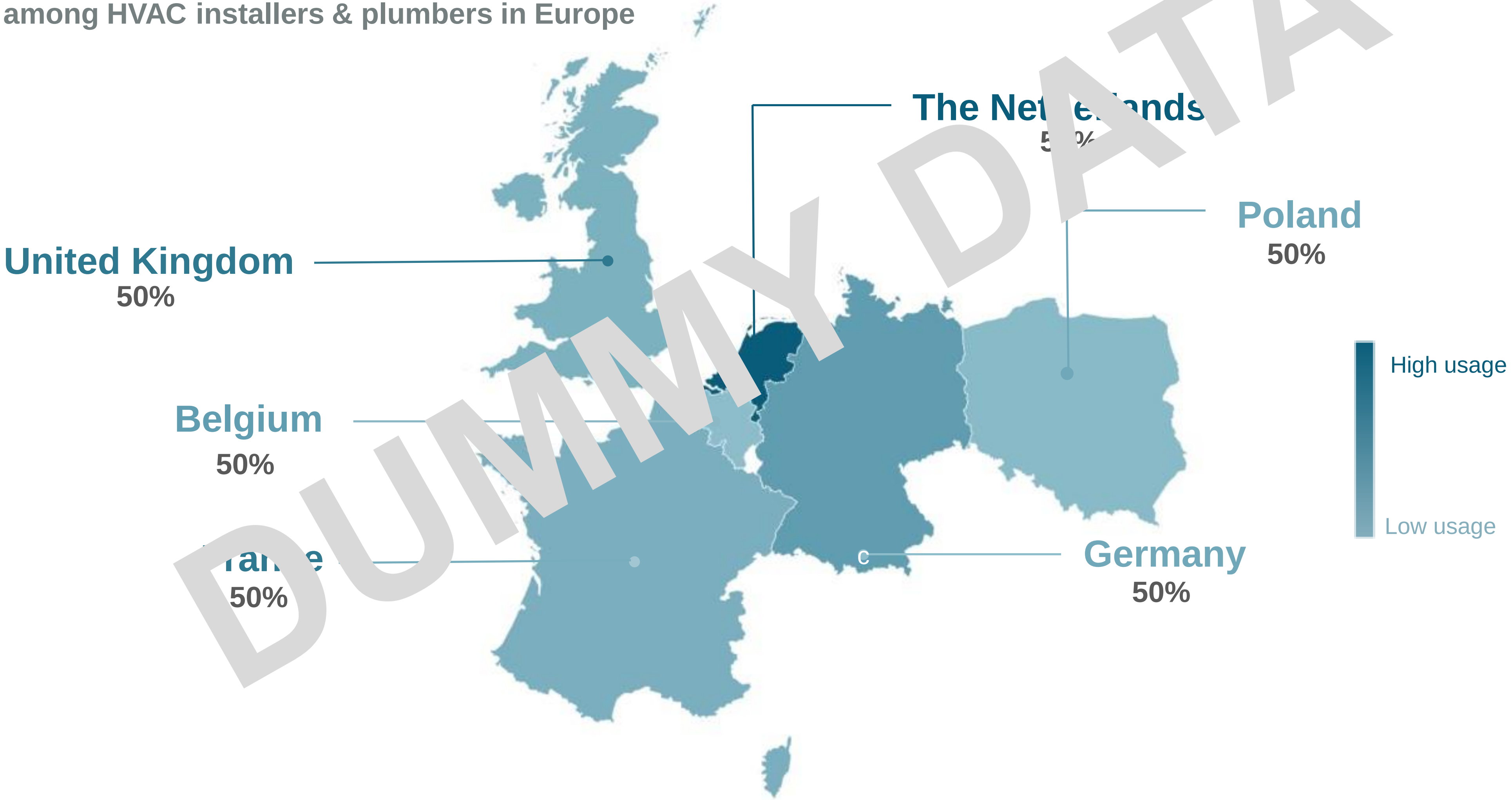
BIM awareness among HVAC installers & plumbers in Europe



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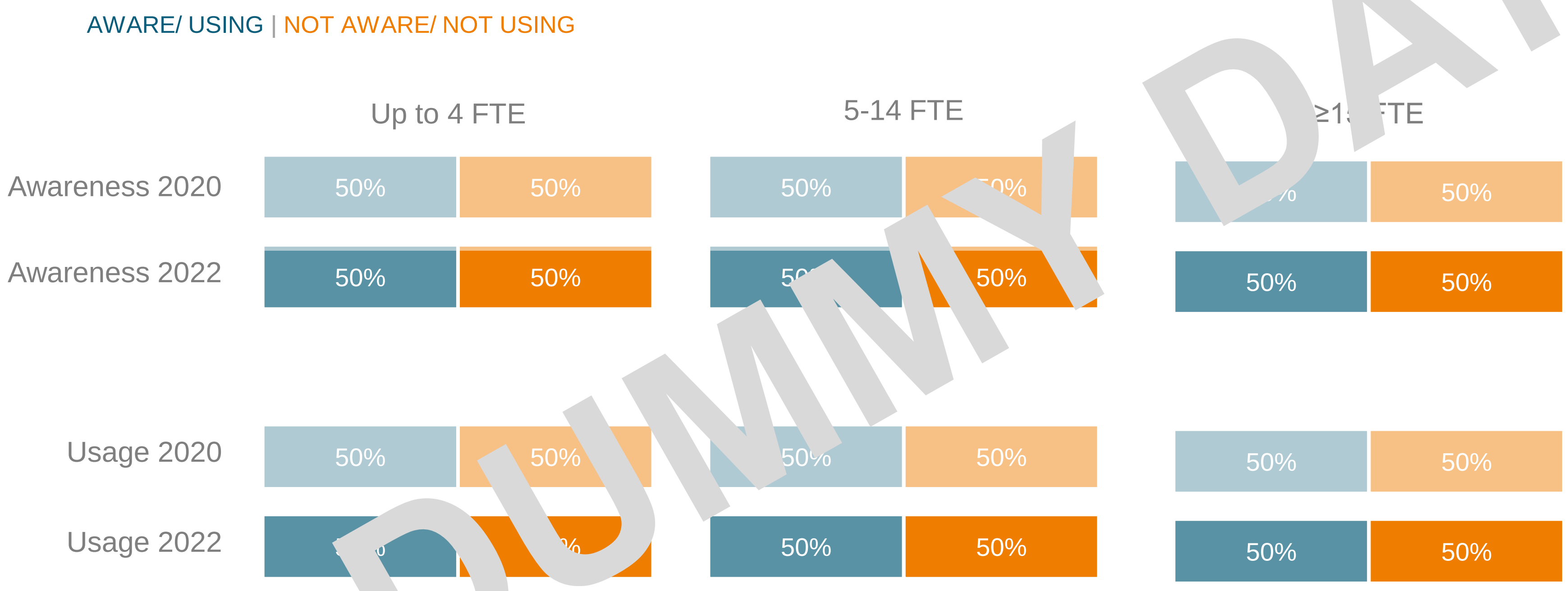
BIM awareness and usage by company size



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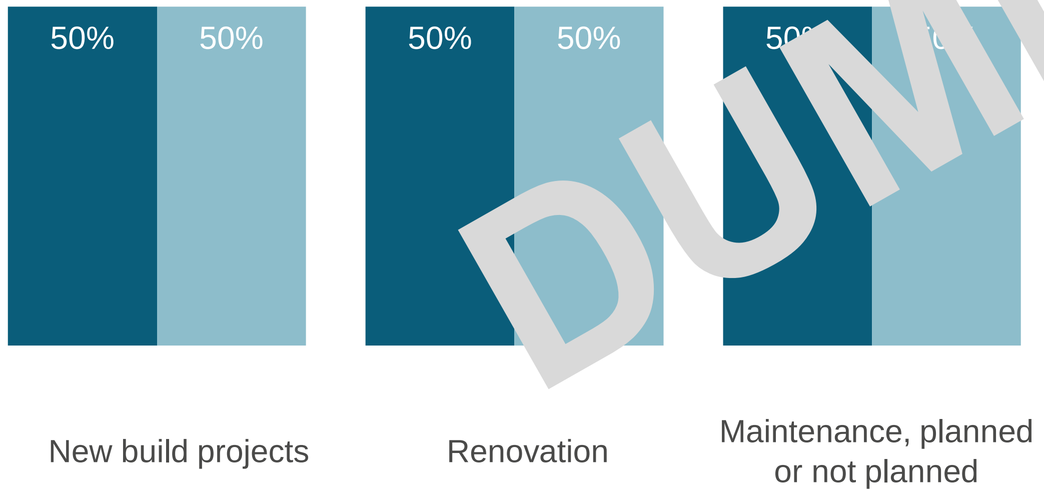
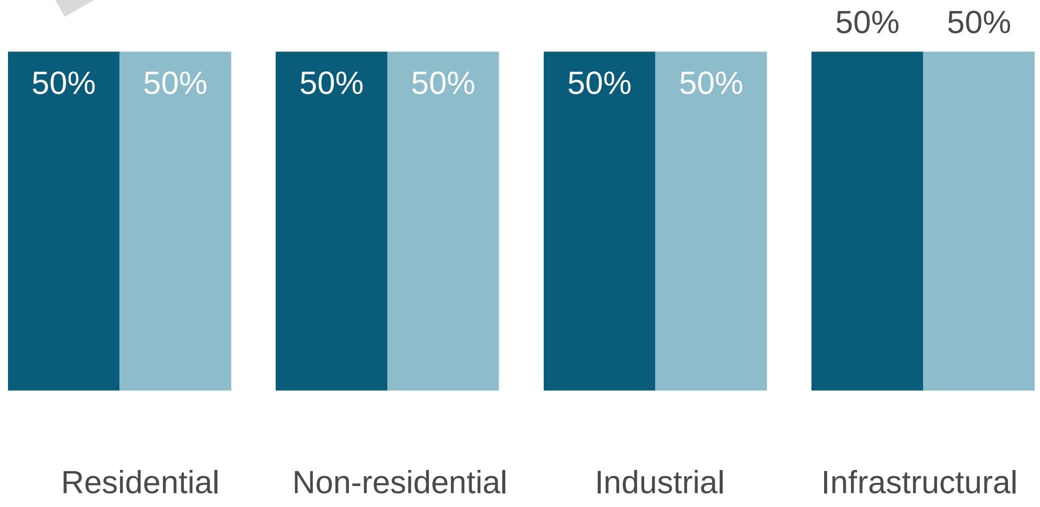
Average turnover for 2022 by new build and renovation
How would you distribute your total turnover from the beginning of 2022 until now over the following types of projects?

BIM users | **Non-users**



Average turnover for 2022 by residential and non-residential projects
How would you distribute your total turnover from the beginning of 2022 until now over the following types of projects?

BIM users | **Non-users**



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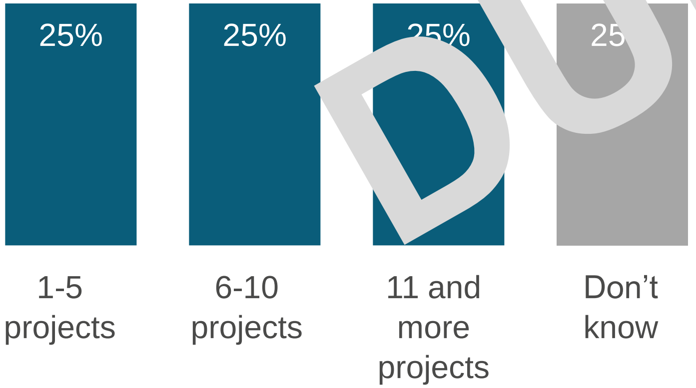
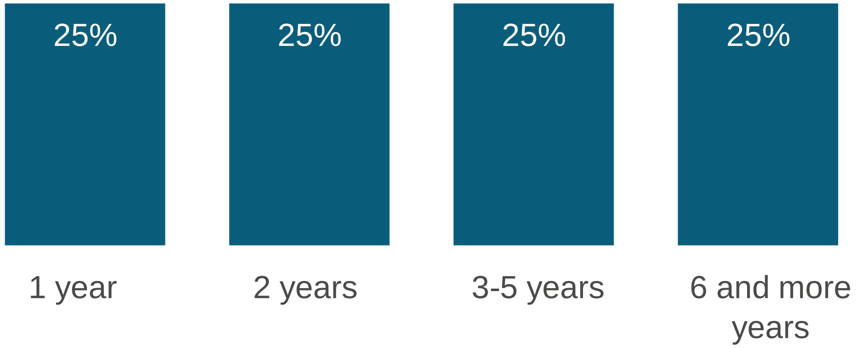
Number of projects done with BIM
Until now how many projects in BIM have you worked on?

On average, European installers have worked on **XY BIM projects.**



Number of years with experience with BIM
When did your company start to work with BIM?

On average, European installers have been working with **BIM for XY years.**



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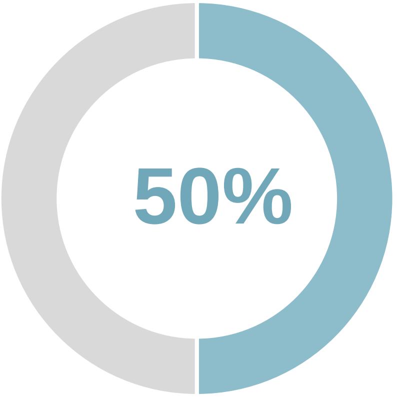
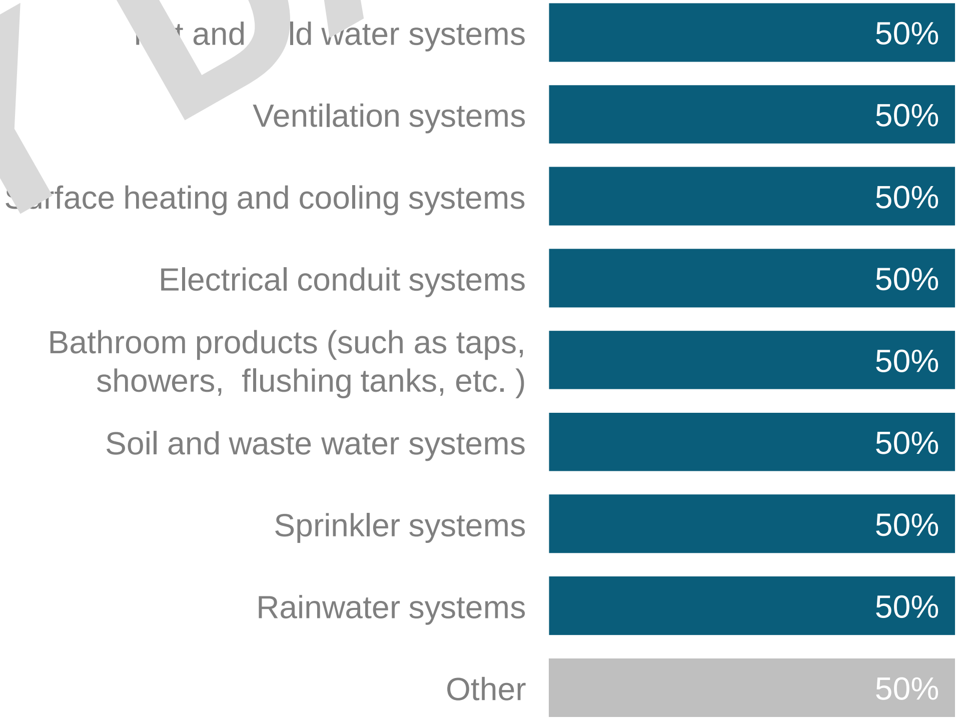


Share of the turnover BIM u ers g t from BIM proj ts

Application areas of B

Q: For which appl are do use B ?



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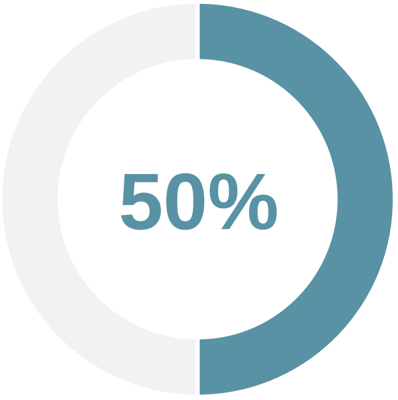


BIM users who have their own BIM software

Availability of BIM software in the company

Q: What BIM software/ platform do you use?

33%

works with

AUTODESK REVIT

33%

works with

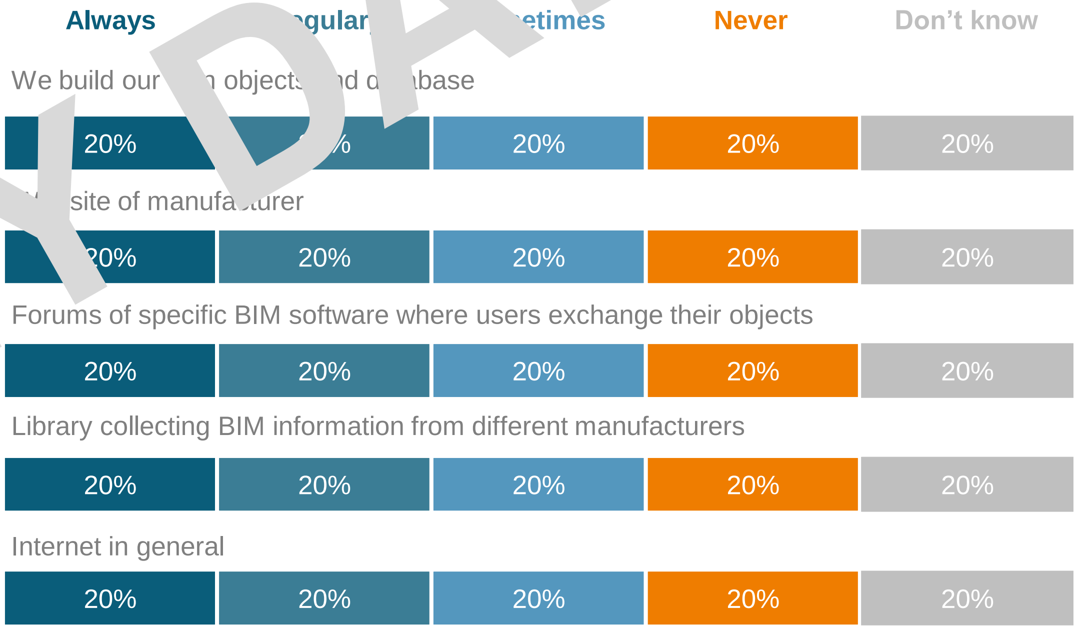
AUTODESK AUTOCAD

works with

4MCAD

Channels used for specific BIM information/objects

Q: To what extent do you use the following channels for specific BIM information/objects?



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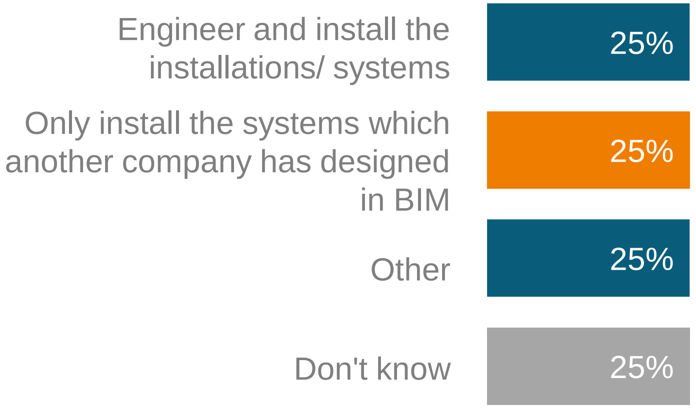
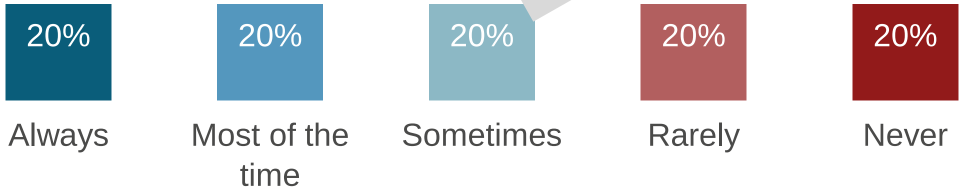
The role of installation companies in BIM projects

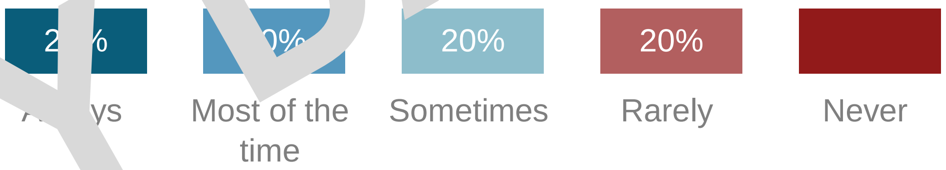
Q: What was/ is (normally) the role of your company in the projects you have done in BIM?



Frequency of starting installation works when BIM model is still incomplete

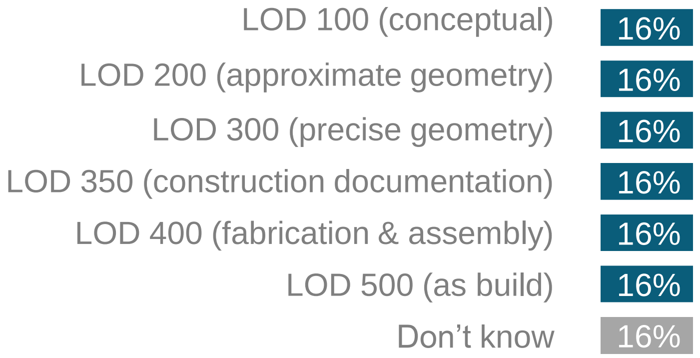


How often BIM models need to be adjusted as the BIM model is not matching with construction site situation



Level of detail of the BIM projects

Q: What is the level of detail of the BIM objects that you prefer to work with?



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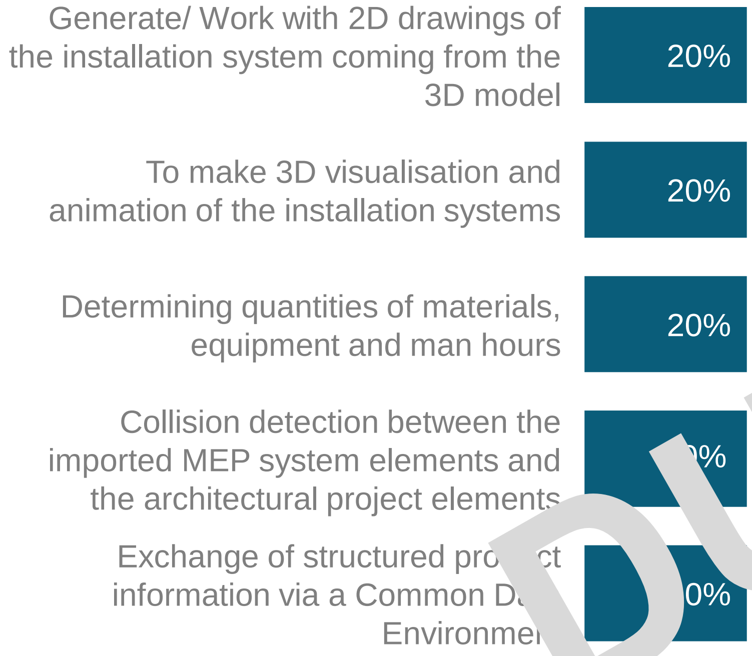
Most relevant features of BIM for the BIM users – Top 5

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

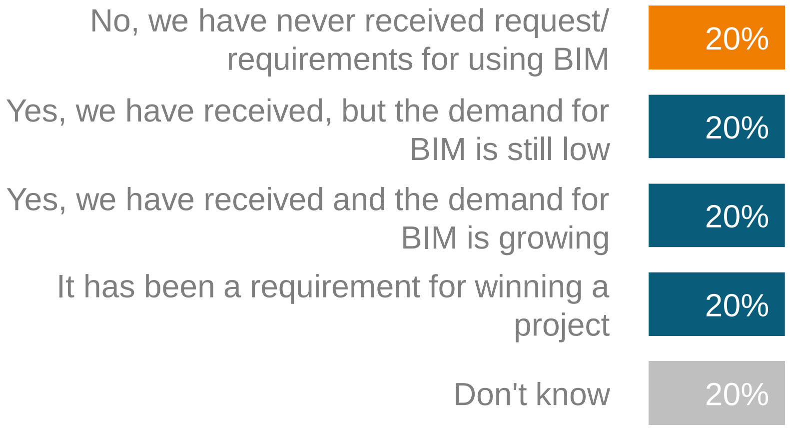


Interest in plug-in tools

Q: Some manufacturers offer plug-i [illegible] compa [illegible] M-software. Is this interesting for you or do you already use this?

B[illegible] users with requests from clients for working in BIM or BIM as a r[illegible]quirement for winning a project

Q: Have you already received any requests from investors/ clients for working in BIM or has it been a requirement for winning a project?



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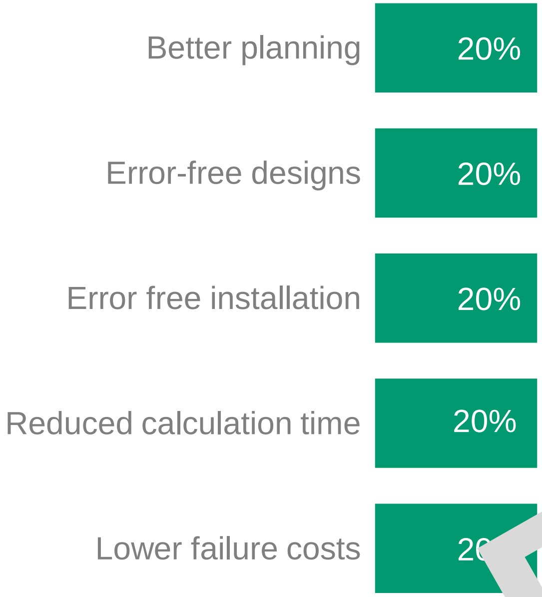
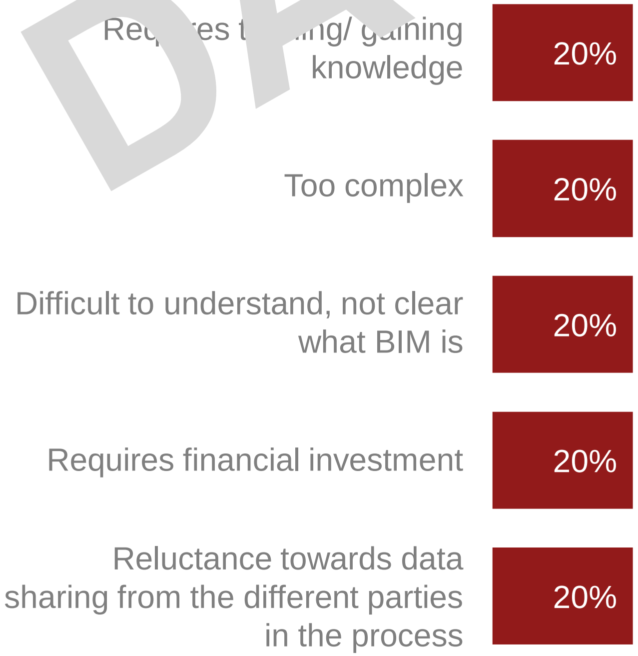
Greatest advantages of BIM – Top 5

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



Disadvantages of BIM – T[illegible] 5

Q: What do you con[illegible] to be the [illegible]eates[illegible]imitations or pain points of BIM?



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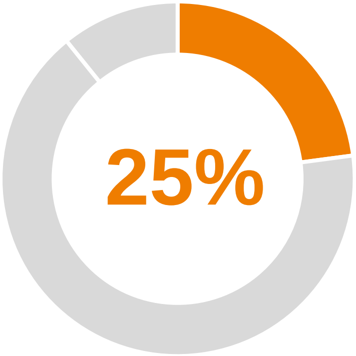
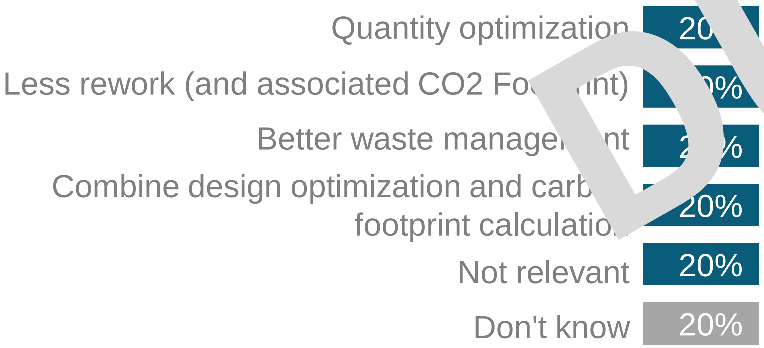


BIM users who will stop working with a supplier that is not BIM ready.

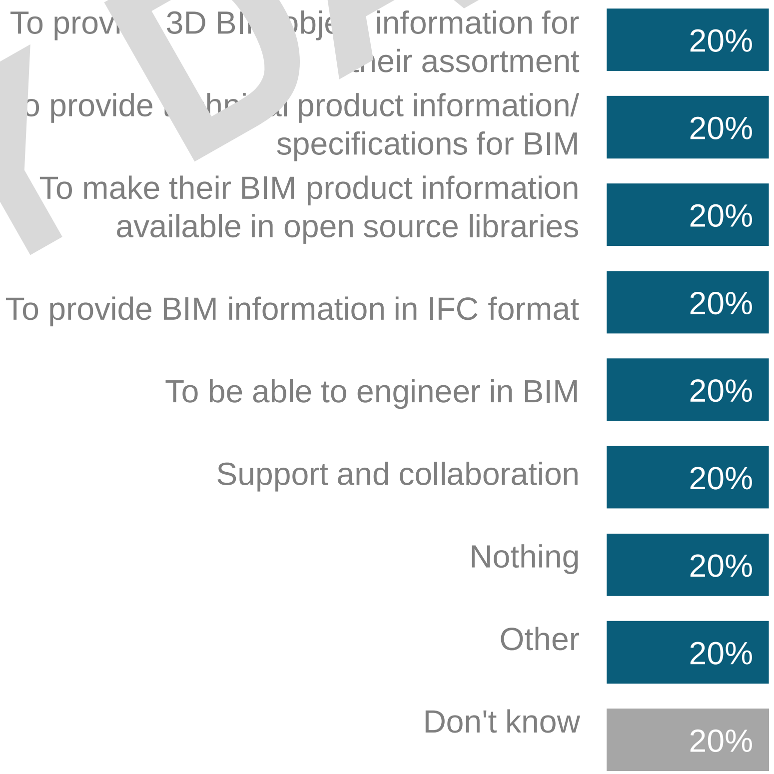
BIM as a support for reducing Building Carbon Footprint

Q: In which way BIM could support your agenda for reducing Building Carbon Footprint?



Expectations towards manufactures in relation to BIM

Q: What do you expect from the manufactures in relation to BIM?



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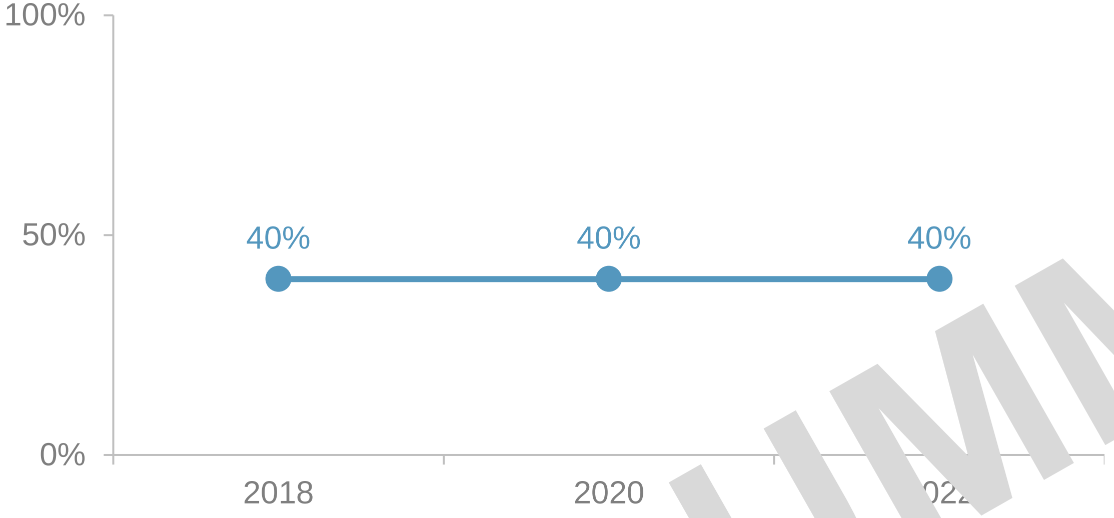
BIM awareness over time
(% of BIM aware installers)



Expectations BIM usage

Q: How long do you think it will take for BIM to be widely used by installation companies, so more than [illegible]0% of the projects to be designed with BIM?

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

Base: n=49, if at least heard of BIM

Base: N= 125 asked to all installers

USP

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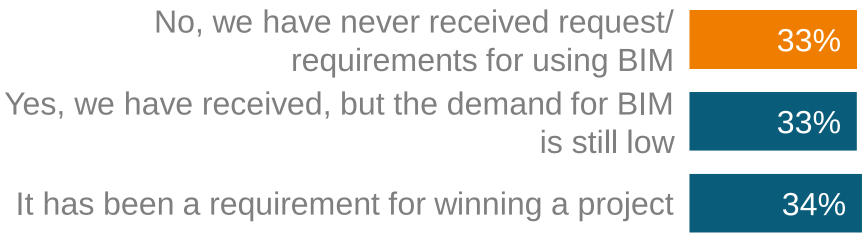
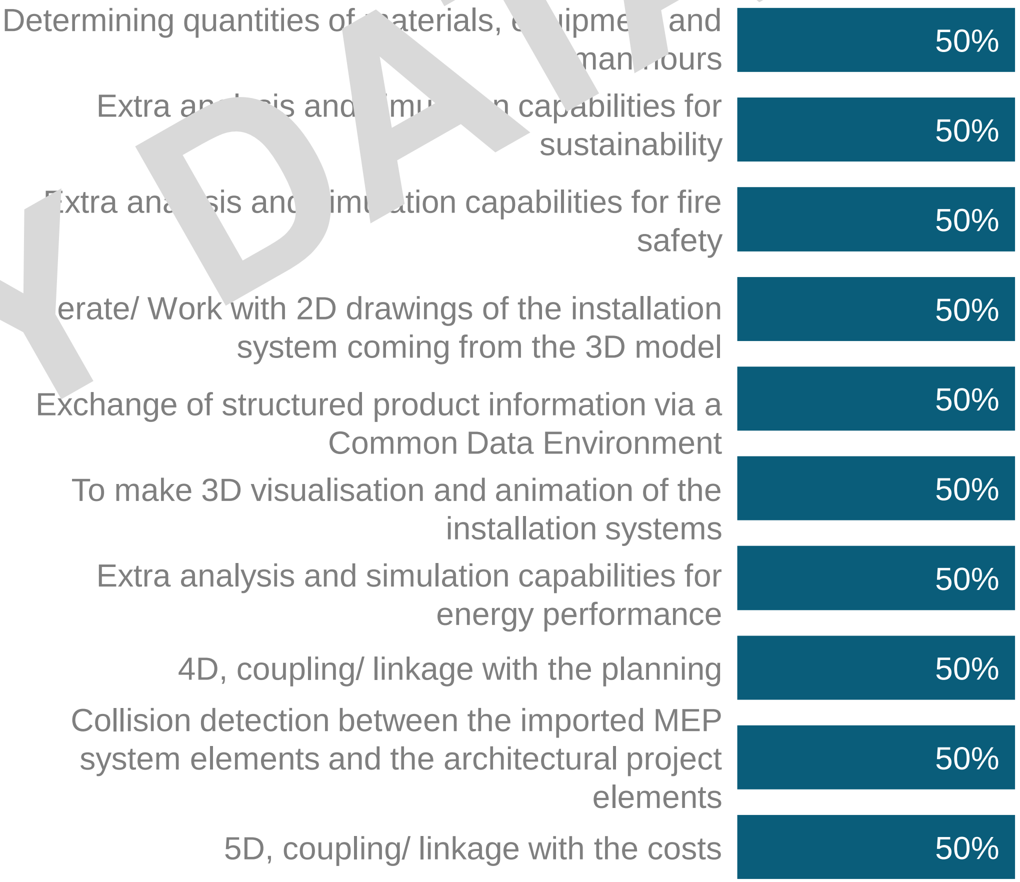
Received requests or requirement for using BIM

Q: Have you already received any requests from investors/ clients for working in BIM or has it been a requirement for winning a project?



Most relevant features of BIM

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



Base: N=125 asked to all installers

Base: n=61 , if at least heard of BIM

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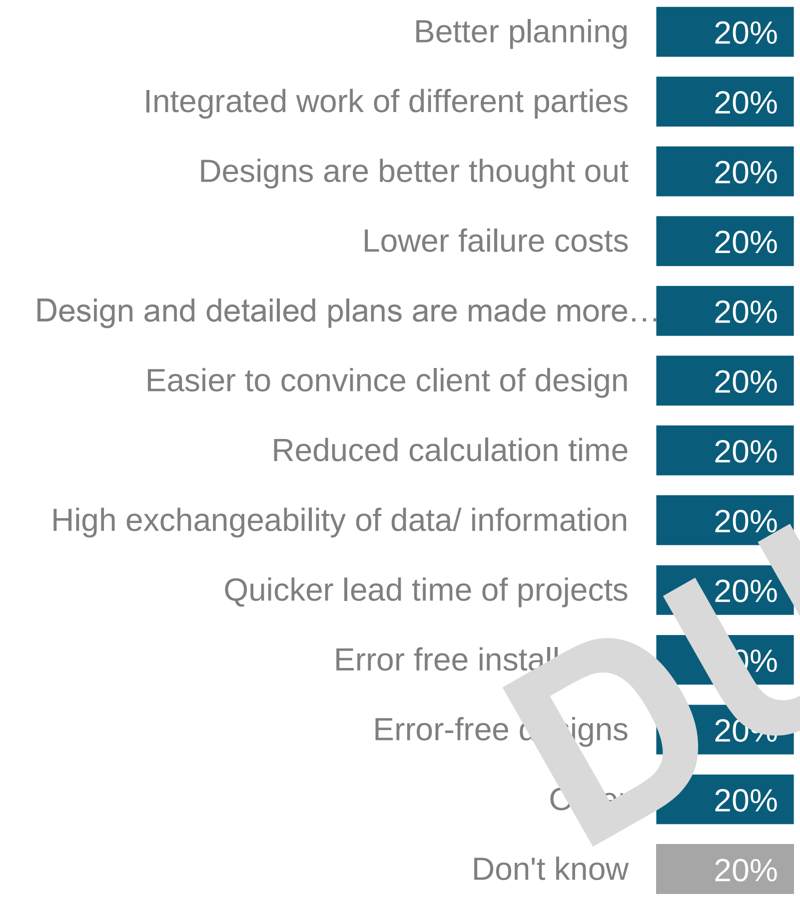
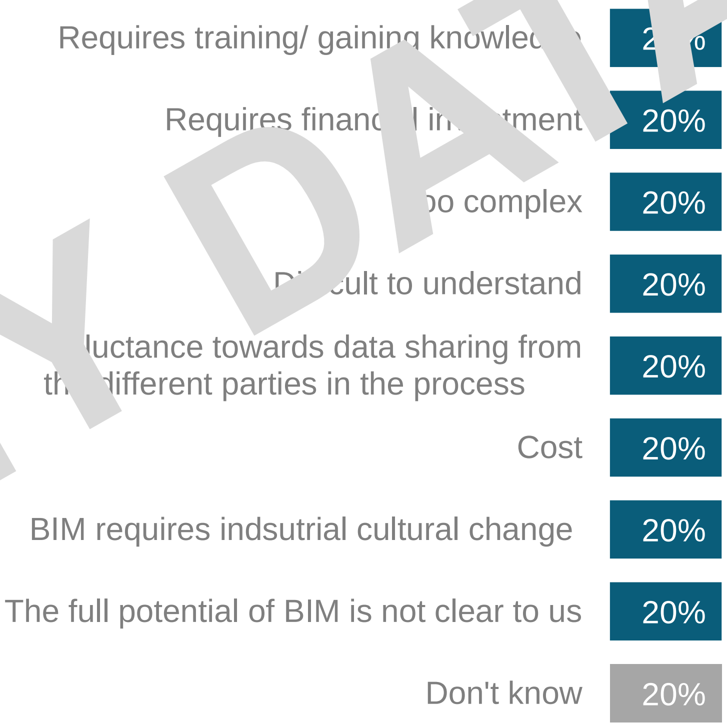
Advantages of BIM

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



Base: n=61, if at least heard of BIM

Limitations of BIM



Base: n=61, if at least heard of BIM

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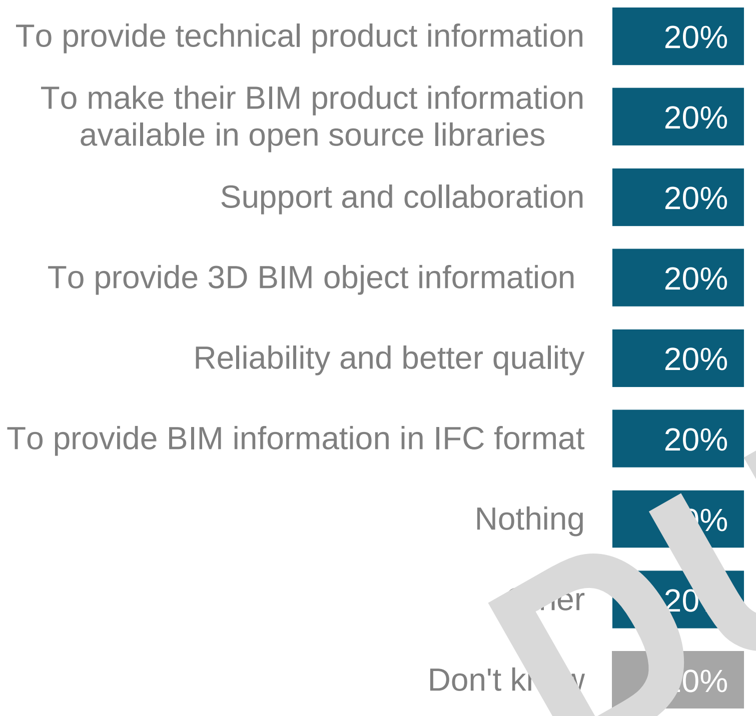
Expectations towards manufactures in relation to BIM

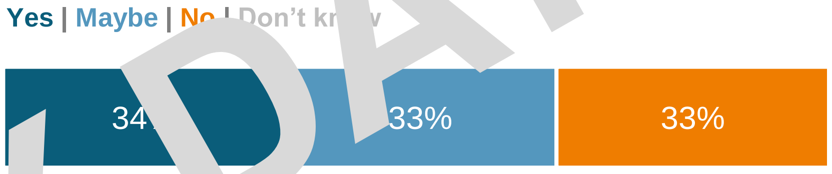
Q: What do you expect from the manufactures in relation to BIM?



Base: n= 61, 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?



Base: n= 61, if at least heard of BIM

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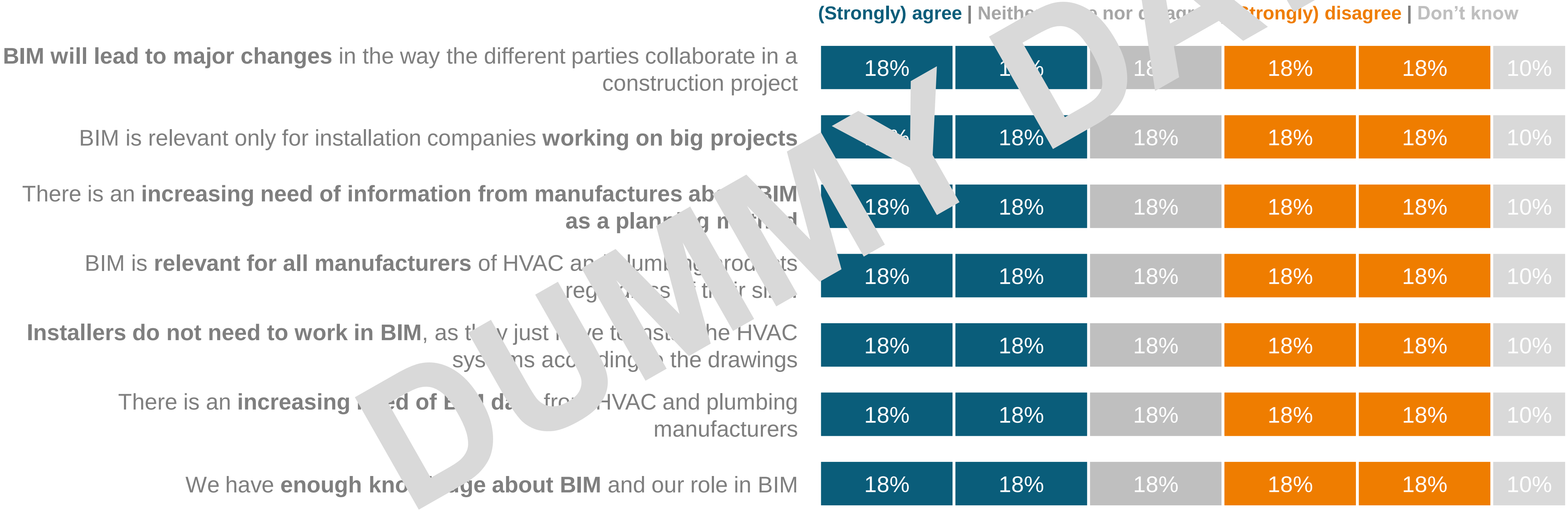
Attitudes towards BIM

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



Base: n= 61, if at least heard of BIM

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France
Poland
Belgium
The Netherlands
Appendix

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

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

	UK	Germany	France	Poland	Belgium	Netherlands
Owner / Director/ Manager	91%	59%	69%	97%	86%	68%
Calculator		1%	21%			8%
Project manager	2%	12%	6%	1%	3%	14%
Plumber/ installer	1%	13%	2%			
Buyer/purchaser	1%	9%	2%			2%
Senior buyer/ Senior purchaser	1%	3%				
Engineer/designer	1%	1%	1%			
1 - 4 FTE	53%	26%	46%	48%	70%	33%
5 - 14 FTE	30%	40%	40%	40%	23%	29%
15+ FTE	17%	34%	14%	12%	8%	38%

Q1 2022 data, unweighted

36

About USP

USP Marketing Consultancy

Head office

Subsidiaries

Rotterdam

Düsseldorf **Zagreb**

Total

70

Research Analysts

Project managers

Consultants

Market specialist
installation, construction, home improvement and real estate

Dedicated and multi-client research

Active in the market for 28 years

250+ dedicated market research projects annually

Revenue distribution

80%

turnover coming from **international projects**

85%

turnover coming from **dedicated market research**, 15% from multi client

70%

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

Research in
32
countries in 2020

68
focus groups

1,278
in-depth interviews

62,758
B2B CATI interviews

52,850
B2C online interviews

USP

What we do

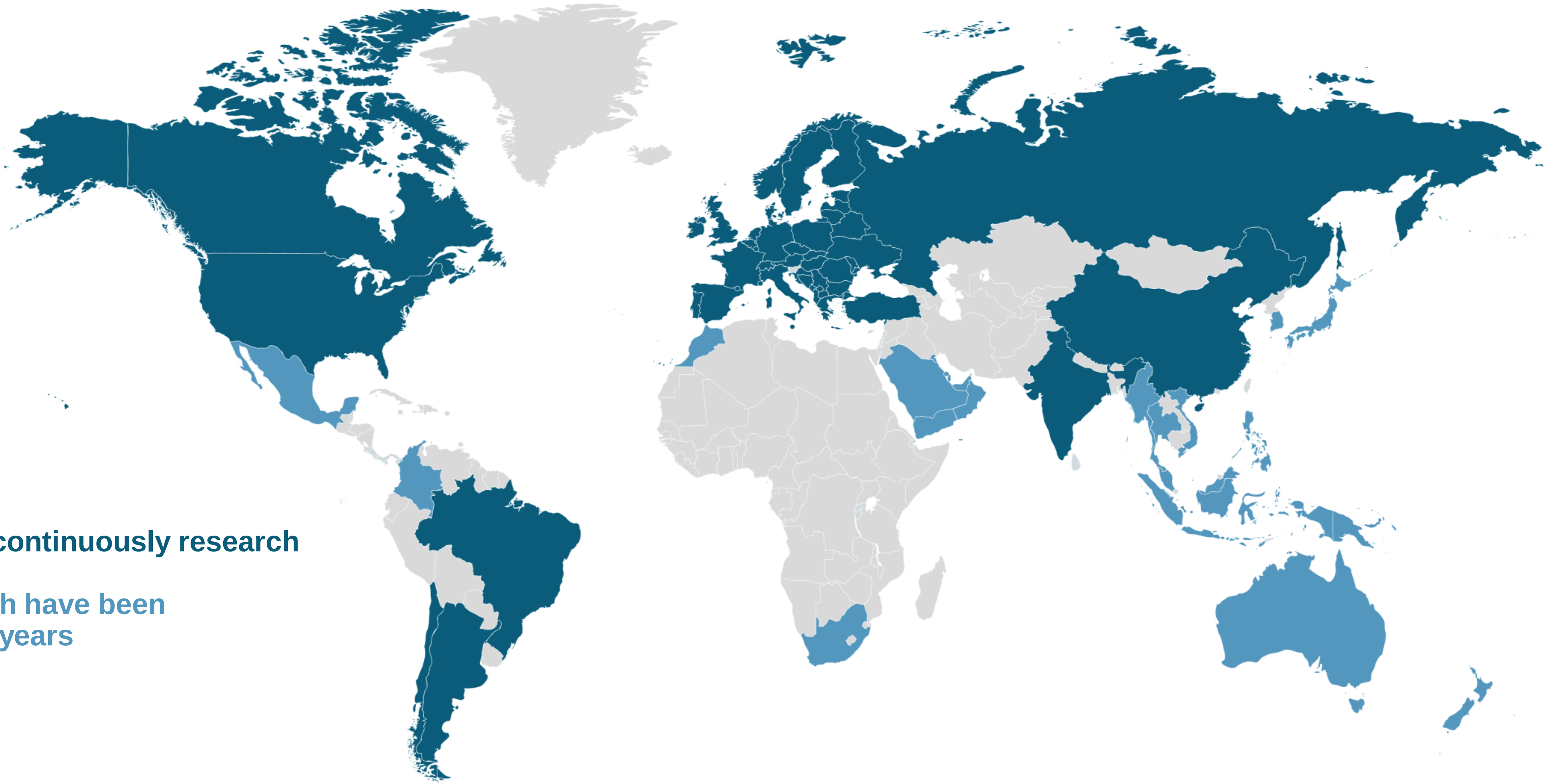
Examples

- **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 quantitative 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

Installation

ABB
BOSCH
GIRA
SFA
GRUNDFOS
hager
Technische Unie
sonepar
Schneider Electric
LG Life's Good
PIPELIFE
KALDEWEI
MITSUBISHI ELECTRIC
Panasonic
TRILUX SIMPLIFY YOUR LIGHT.
uponor
VIESMANN
Vaillant
engie
EMERSON.
signify
wavin
GEBERIT
DAIKIN
Nexans
TTI
wilo
ROTHENBERGER

DIY

OBI
adeo
PPG
maxeda DIY Group
SAINT-GOBAIN
VELUX
BRIGGS & STRATTON
Dulux
fischer innovative solutions
UNILIN FOR SMART LIVING
WAGNER
GROHE
WD-40
Yale

Construction

ASSA ABLOY
AkzoNobel
ArcelorMittal
DAW
etex inspiring ways of living
FESTOOL
icopal
Interface
KNAUF
OWENS CORNING
ROCKWOOL
sto Building with conscience.
Tarkett
TRESPA

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: Services in installation sector • Q3: Certification & circularity • 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