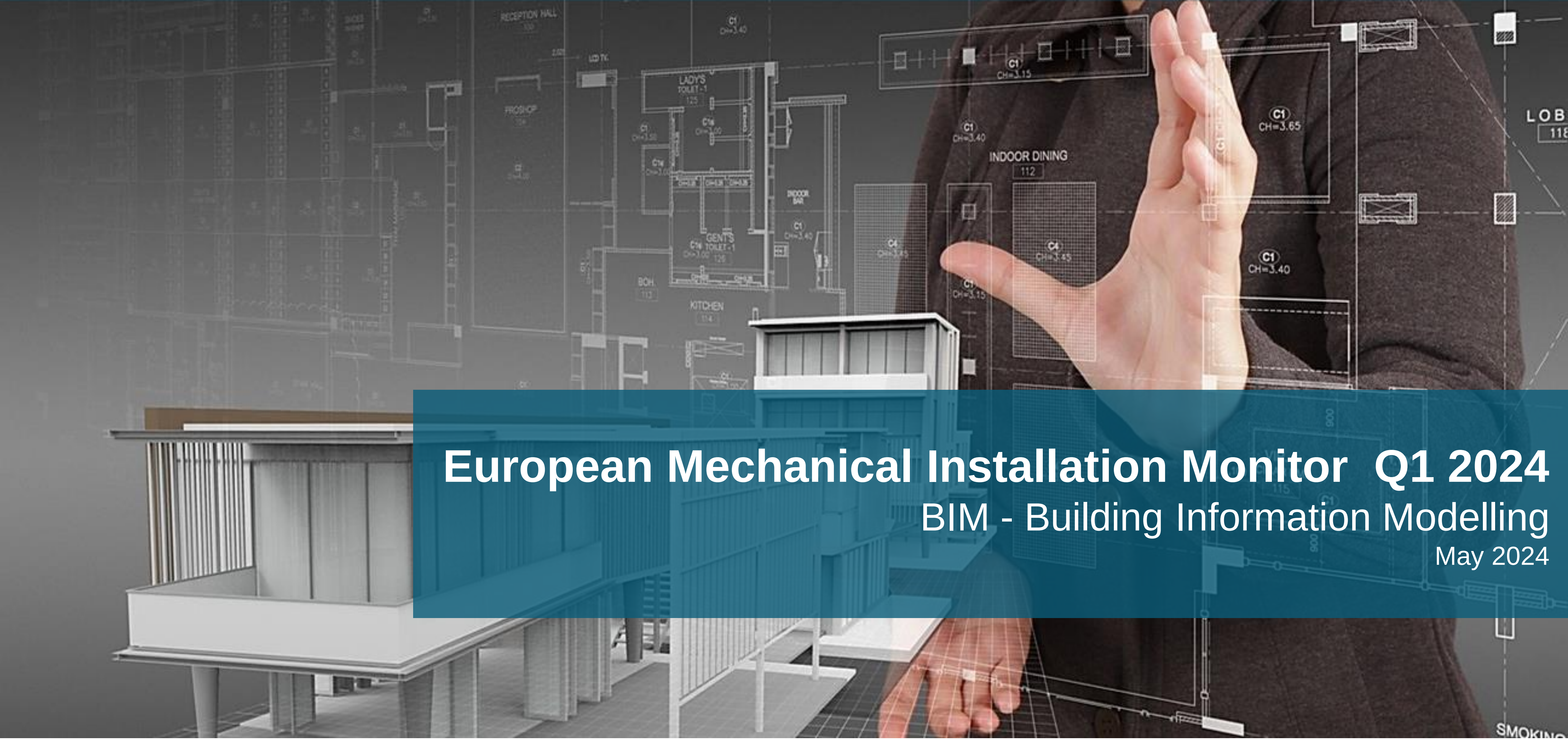

European Mechanical Installation Monitor Q1 2024

BIM - Building Information Modelling

May 2024

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 around 700 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)

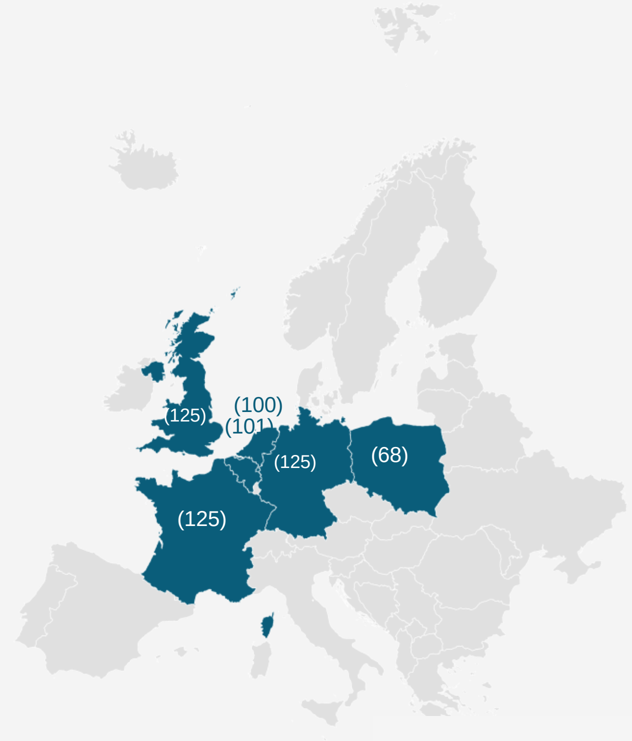
Quarterly theme topics in 2024:
Q1: BIM
Q2: Smart and connected products
Q3: Prefab
Q4: Media orientation

THE TIMELINE

Report Q1	Report Q2	Report Q3	Report Q4
May 2024	August 2024	November 2024	February 2025

COUNTRY SCOPE

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



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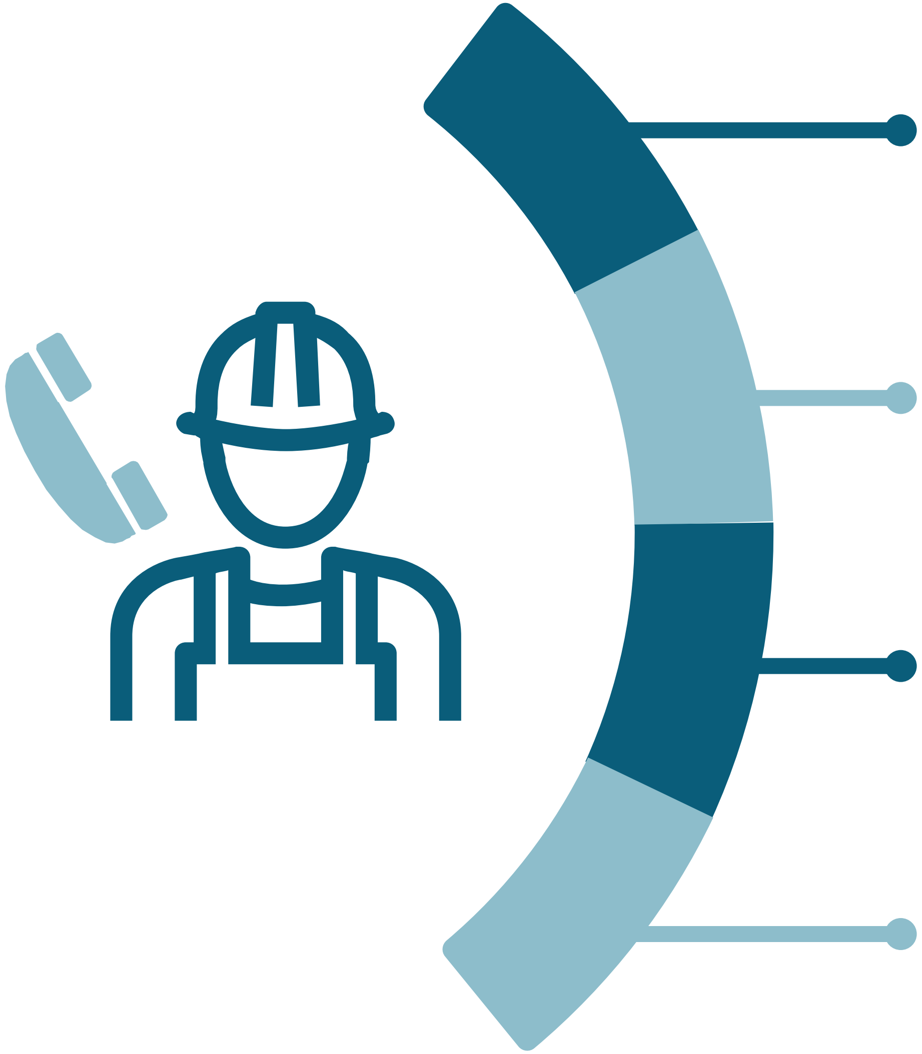
About target group & methodology



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 typically most interviews are 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

About the Q1 theme topic

BIM in the installation sector…

Installation systems become more and more complex. Different types of installation systems are often connected, and installers need to have knowledge about a broad range of installation systems. Moreover, in large-scale building projects, installers need to work with several other parties who are involved in the construction 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 into the awareness and usage of BIM and how installers can be supported in this area

To provide the necessary insights, we covered the following topics:

- 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 of manufacturers regarding BIM.

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Key takeaways

1

Business Development

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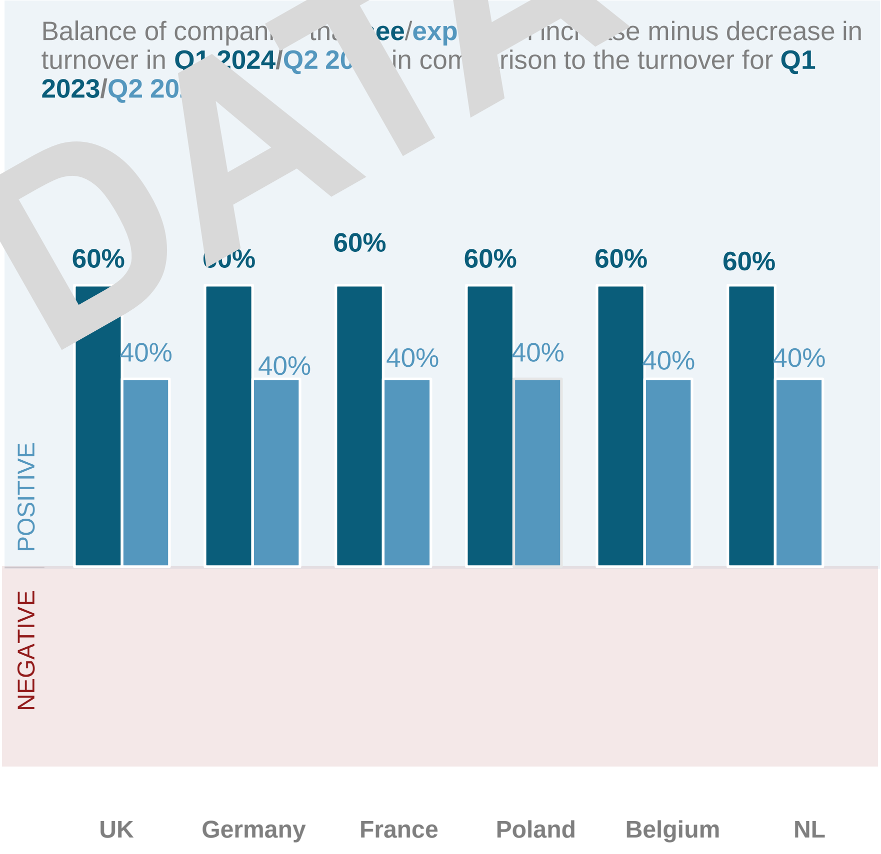
Turnover balance of installers Q1 2024 and Q2 2024



Key takeaways

2

Theme: Building information modelling

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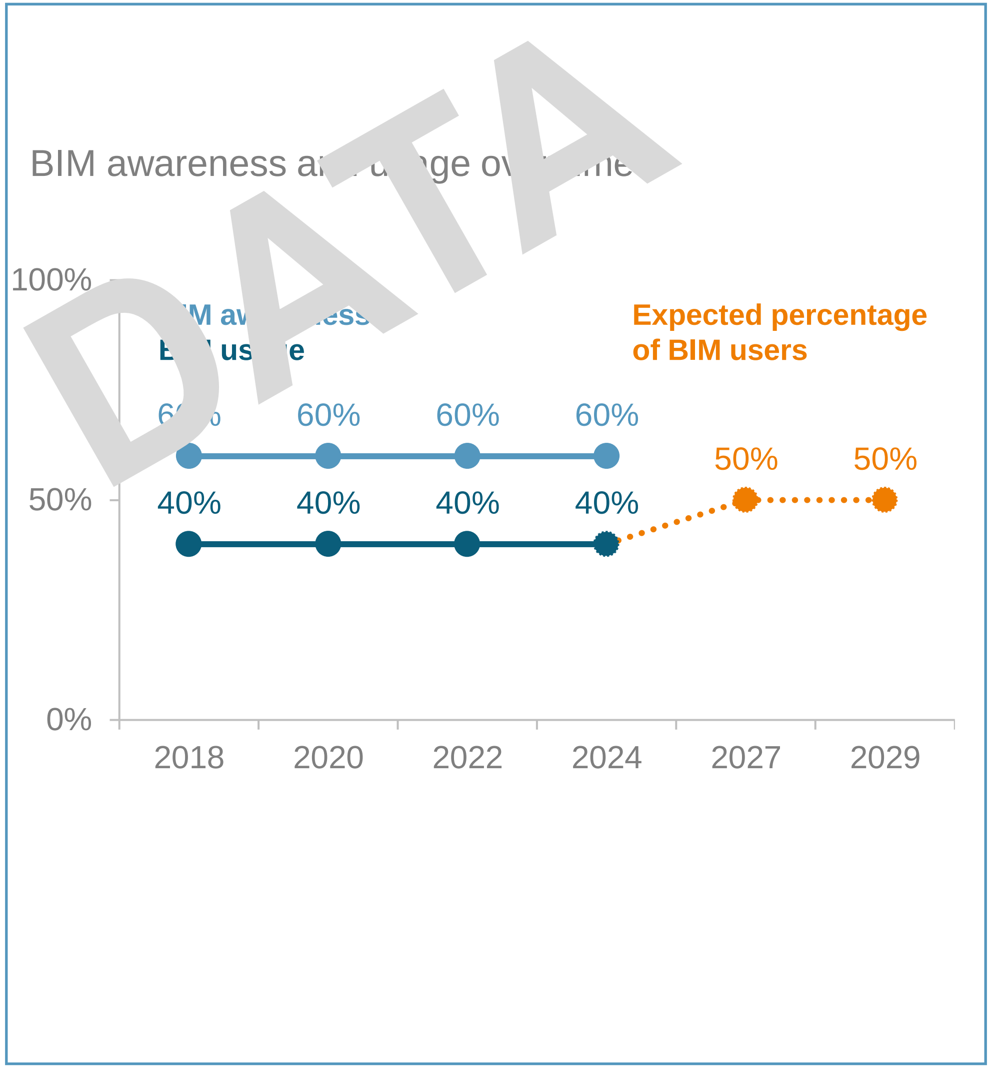

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Core HVAC activities

Which of the following installation activities does your company perform?

	UK	Germany	France	Poland	Belgium	Netherlands
Sample size	*125*	*125*	*125*	*68*	*100*	*101*
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%
Heat pumps	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*	*125*	*68*	*100*	*101*
Solar cell, 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%

USP

Core HVAC activities

	Core HVAC activities	Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Heating installations	40%	40%	40%	40%
Hot & cold water installation	40%	40%	40%	40%
Installation of sanitary ware	40%	40%	40%	[illegible]
Heat pumps	40%	40%	[illegible]	[illegible]
Ventilation	40%	[illegible]	[illegible]	40%
Air conditioning and cooling	[illegible]	[illegible]	40%	40%

Other activities

	Other activities	Per company size: 1-4 FTE	5-14 FTE	15+ FTE
Home automation installations	[illegible]	40%	40%	40%
Electrical installations	40%	40%	40%	40%
Solar cell, solar collectors	40%	40%	40%	40%

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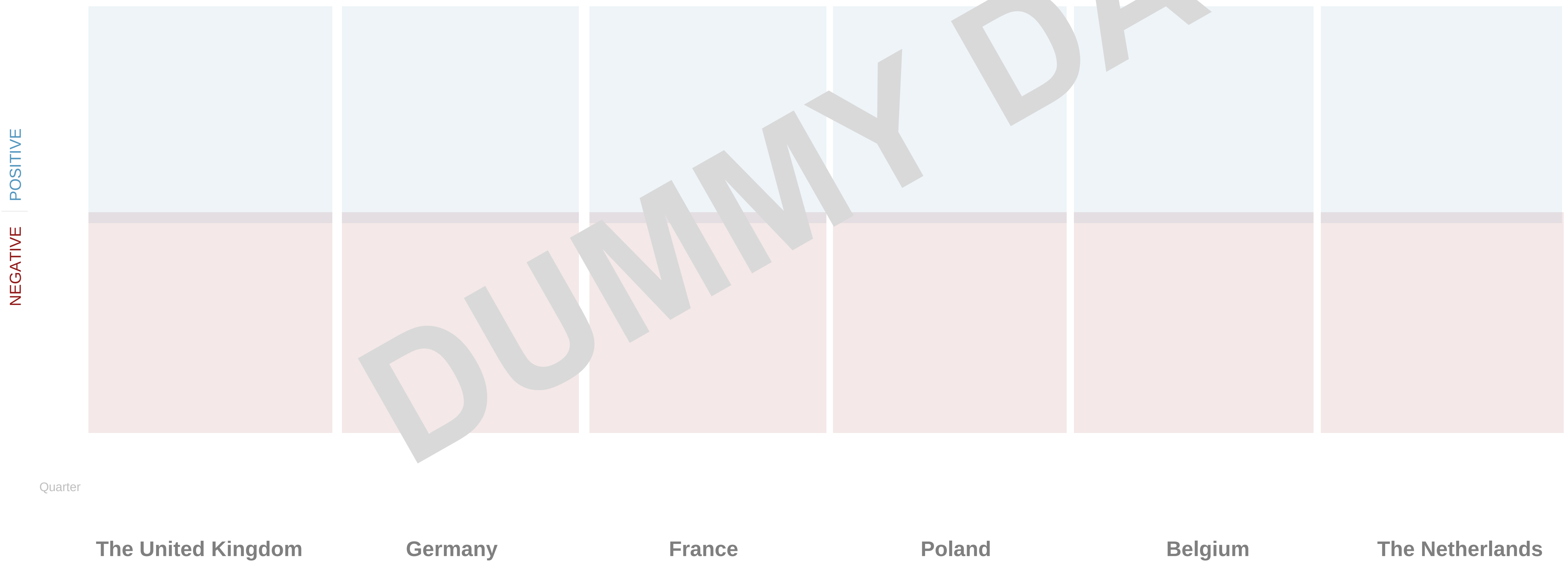
Turnover outlook last quarters and expectations for Q1 2024

TURNOVER BALANCE

(% INCREASE minus % DECREASE)

COMPARISON SAME QUARTER LAST YEAR



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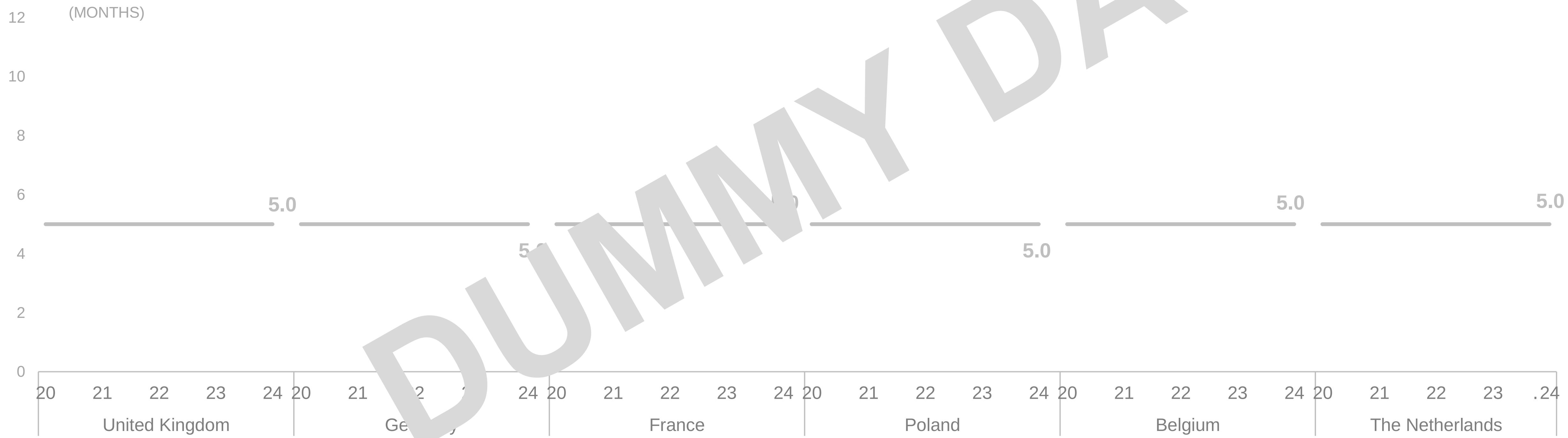
Order book portfolio

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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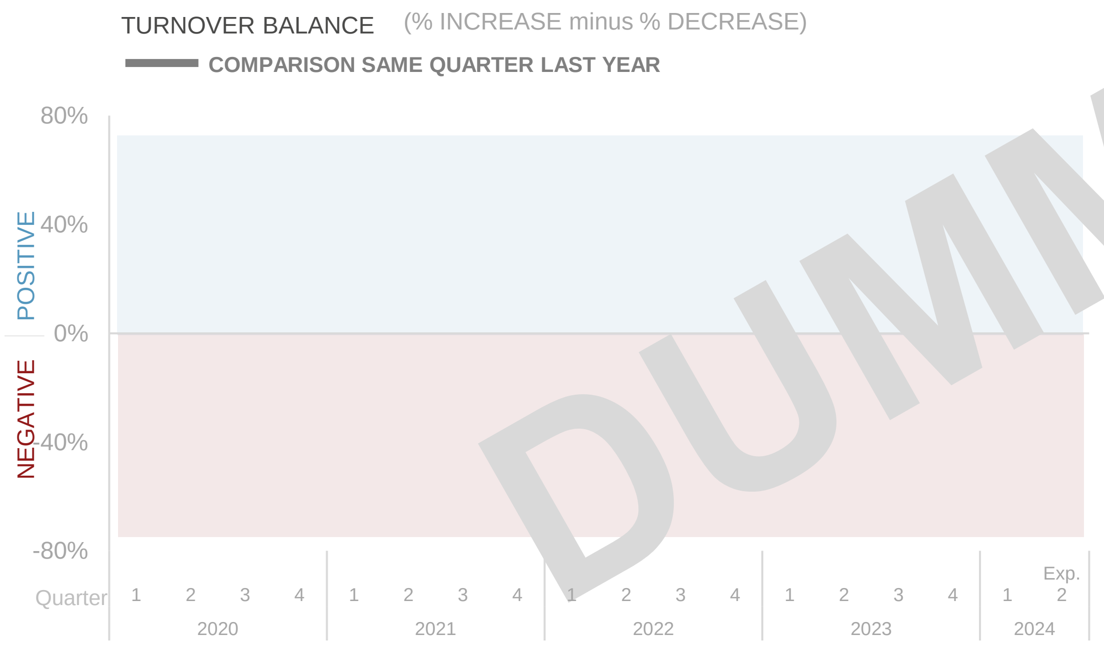
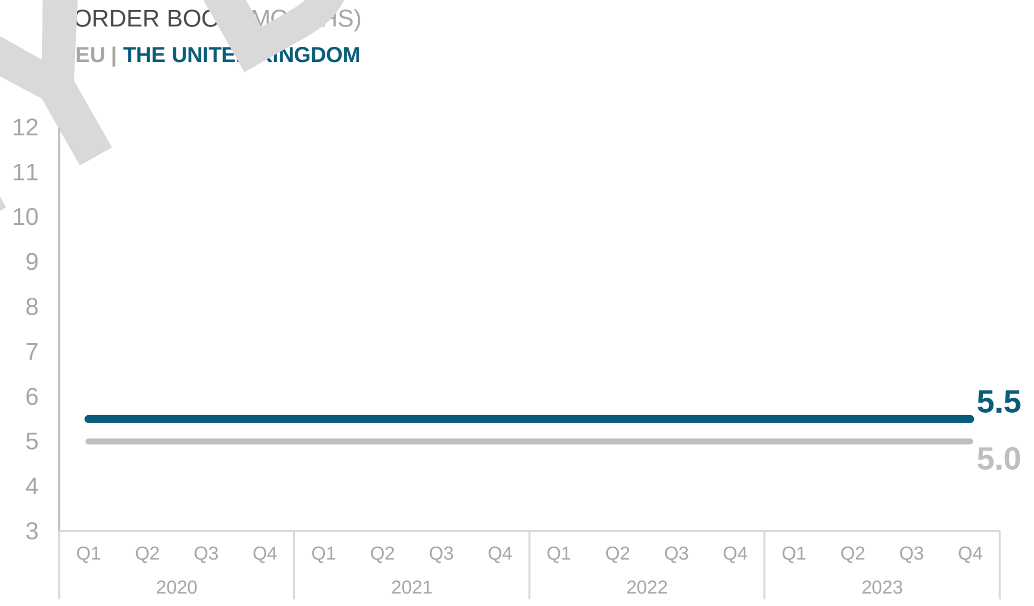
Turnover outlook

If you compare your turnover of Q1-24 to Q1-23, how did your turnover develop?
What are your expectations for the development in Q2-24?



Order book portfolio

How big is your current order book portfolio?



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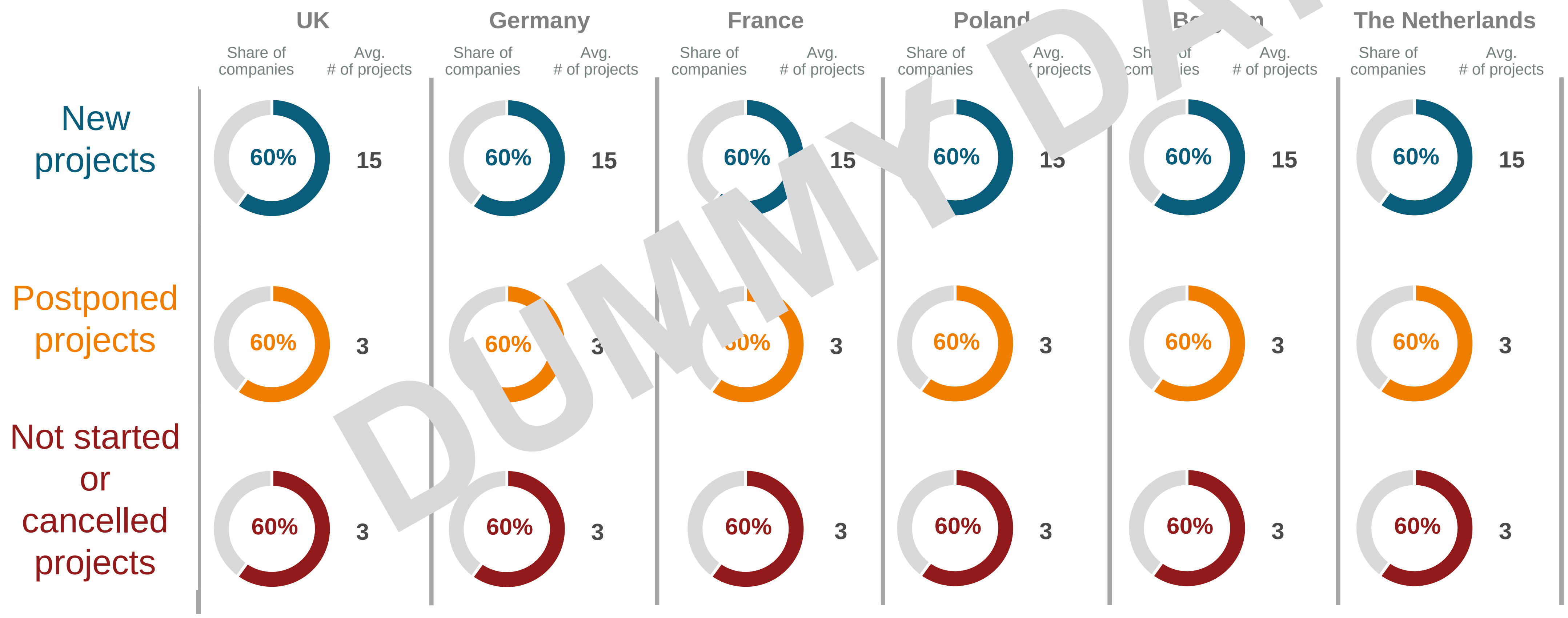
Number of projects in Q1 2024

How many new projects has your company scored/ been commissioned in Q1 2024? How many projects have been postponed in Q1 2024? In Q1 2024, how many projects were not started and cancelled?



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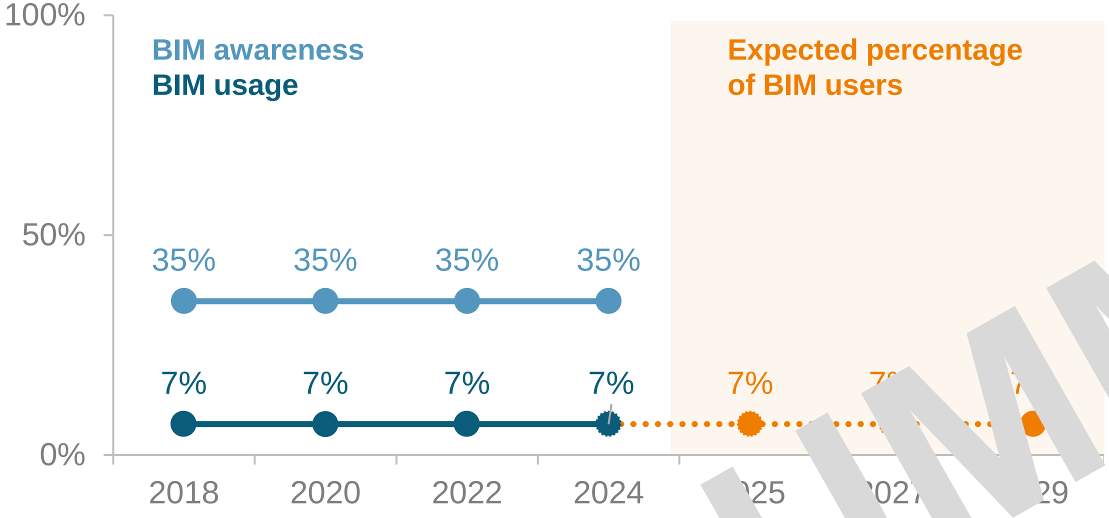
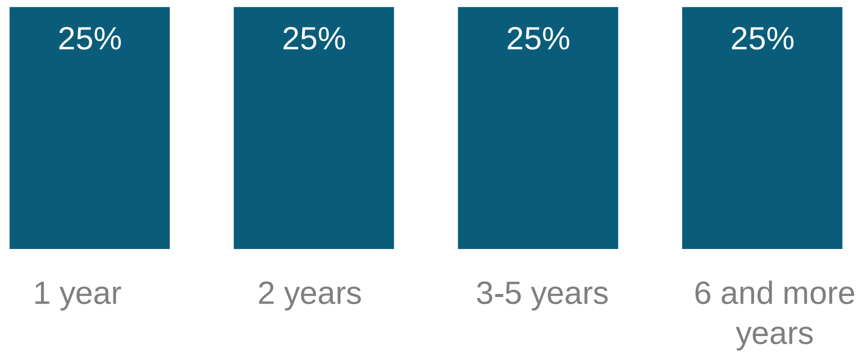
BIM awareness and usage over time



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 XX years.
Almost half of the installers have been working with BIM for 6 or more years already.



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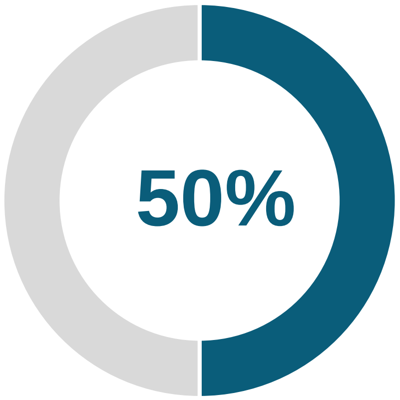
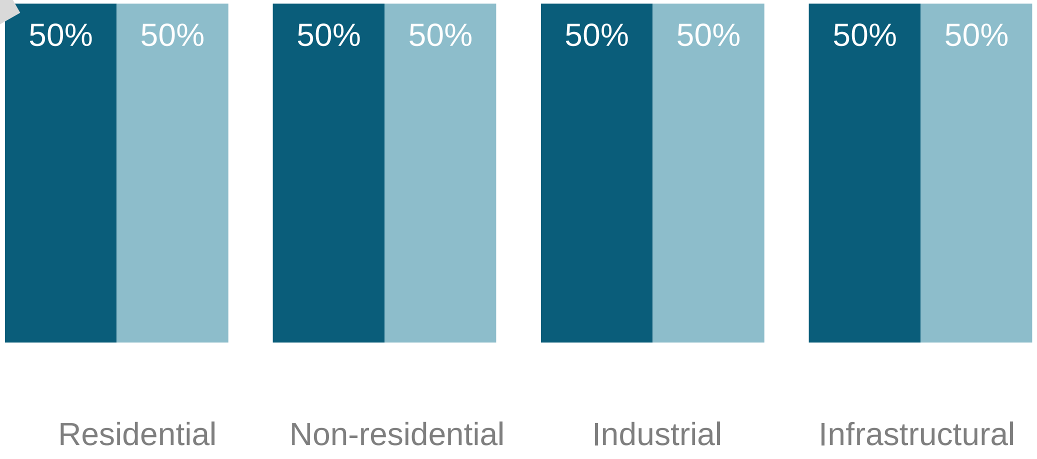


Share of the turnover BIM users generate from BIM projects

Average turnover for 2023 in residential and non-residential projects
How would you distribute your total turnover from the beginning of 2023 until now over the following types of projects?

BIM users | Non-users



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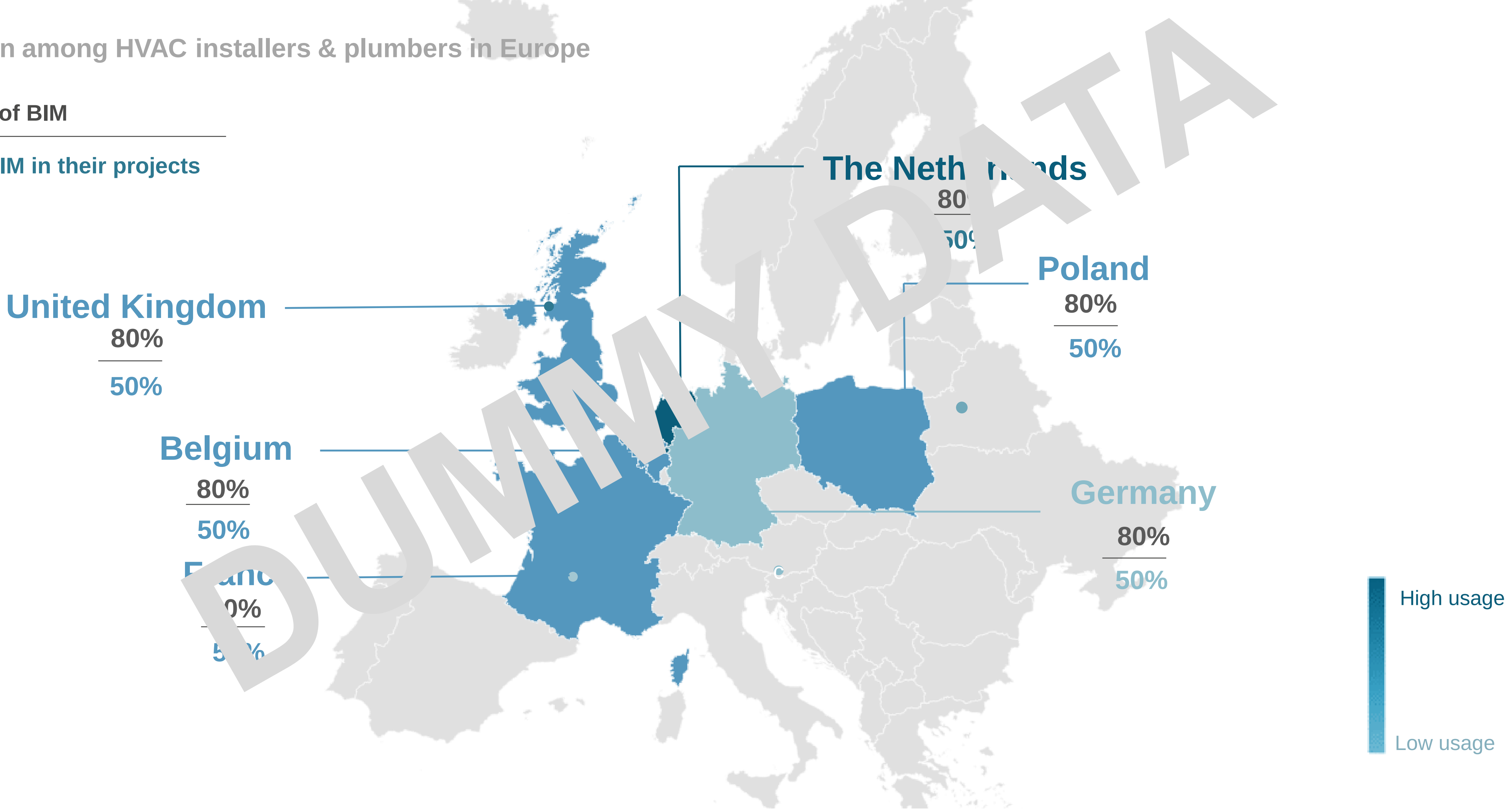
BIM penetration among HVAC installers & plumbers in Europe

Total awareness of BIM

Installer using BIM in their projects



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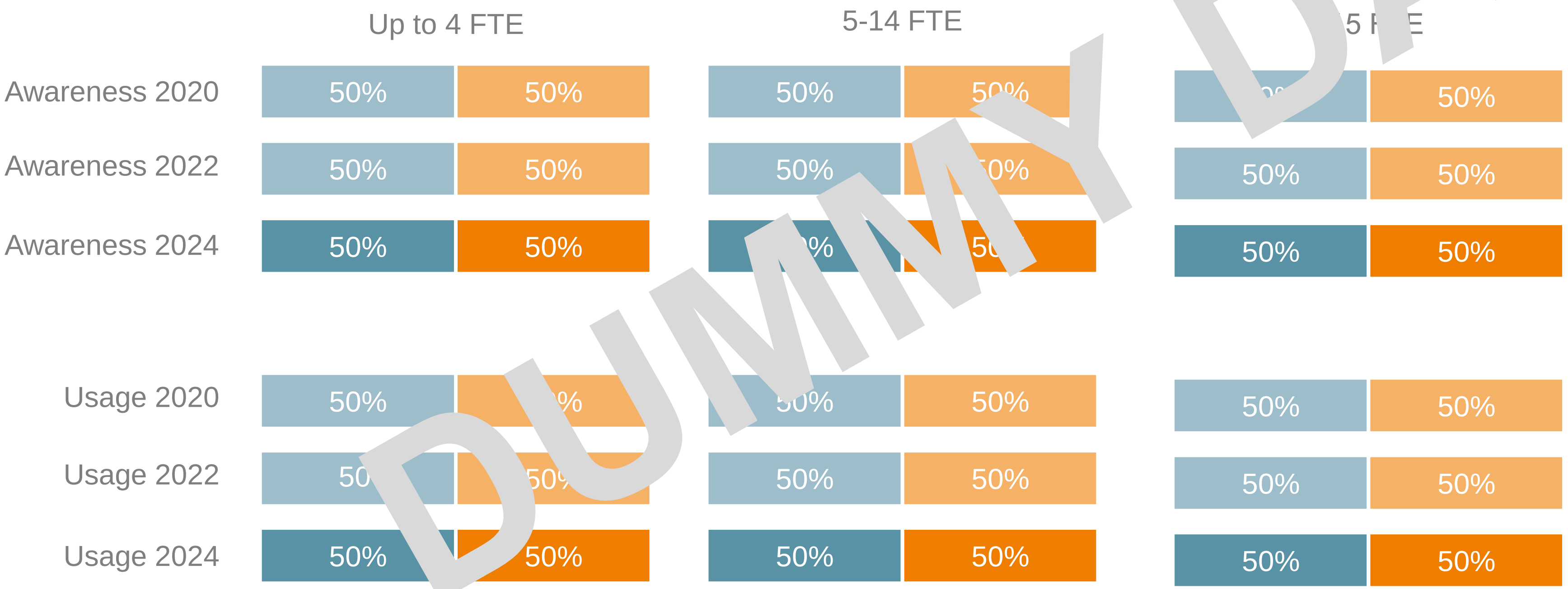
BIM awareness and usage by company size

AWARE/ USING | NOT AWARE/ NOT USING



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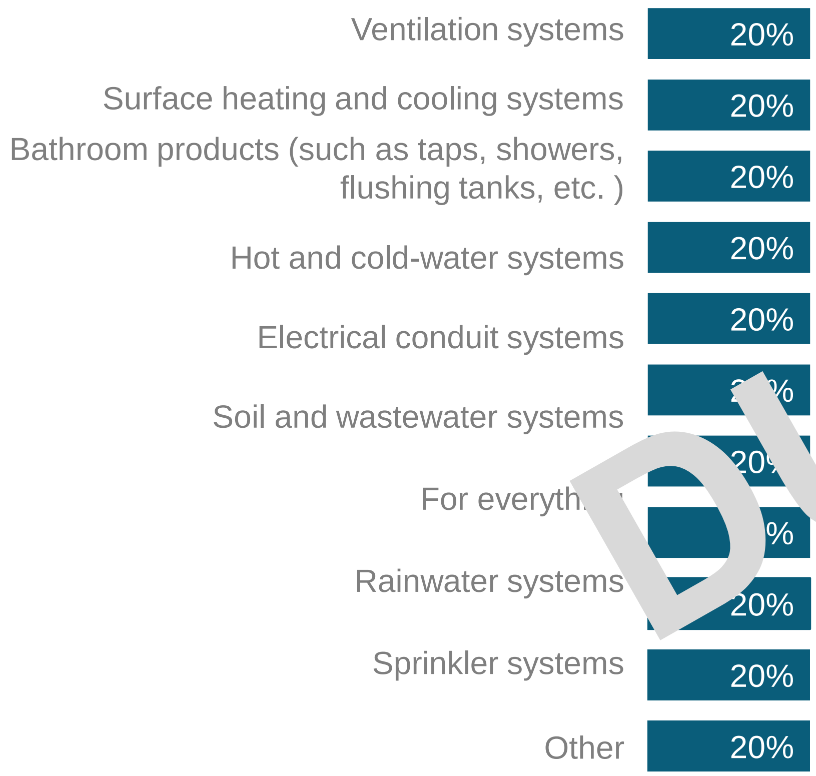
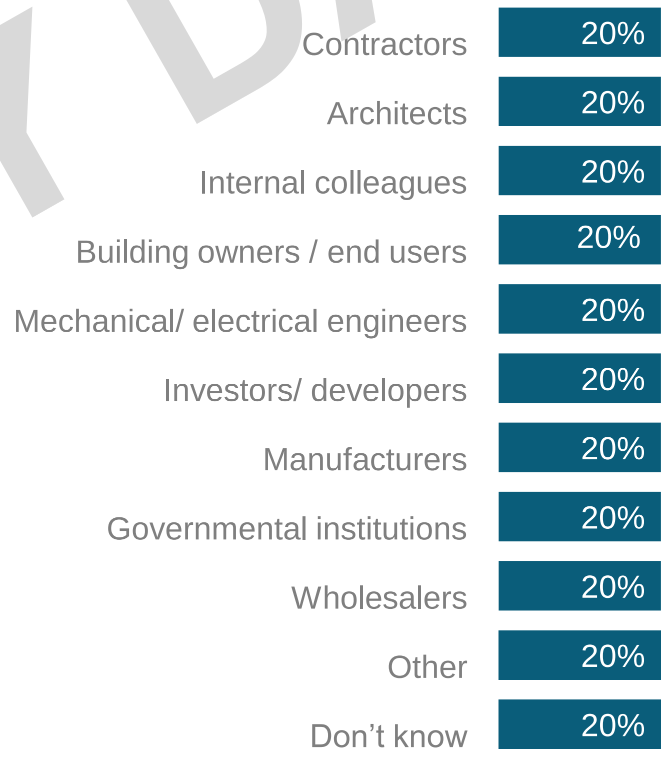
Application areas of BIM

Q: For which application areas do you use BIM?



Stakeholders in BIM data sharing

Q: With which stakeholders do you exchange BIM data regularly?



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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?

50%
works with
AUTODESK Revit

50%
works with
ALLPLAN
A NEMETSCHEK COMPANY

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

	Always	Regularly	Sometimes	Never	Don't know
We build our own objects and database	20%	20%	20%	20%	20%
Website of manufacturer	20%	20%	20%	20%	20%
Forums of specific BIM software where users exchange their objects	20%	20%	20%	20%	20%
Library collecting BIM information from different manufacturers	20%	20%	20%	20%	20%
Internet in general	20%	20%	20%	20%	20%

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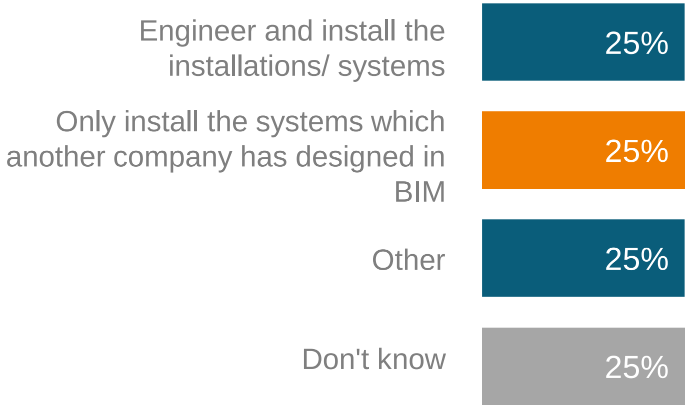
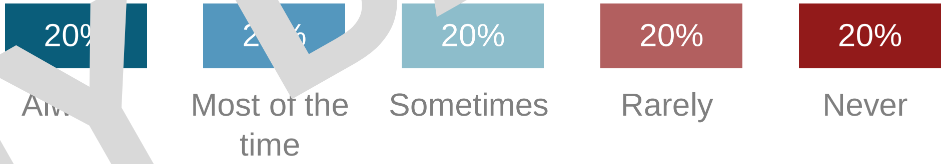
The role of installation companies in BIM projects

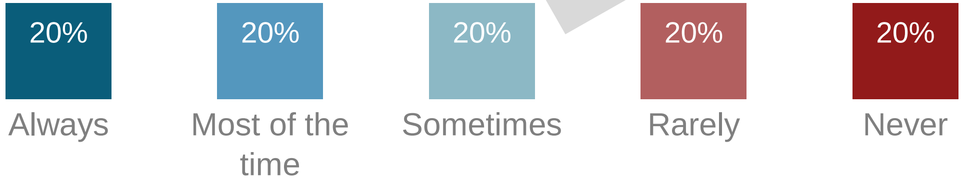
Q: What was/ is (normally) the role of your company in the projects you have done in BIM?



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

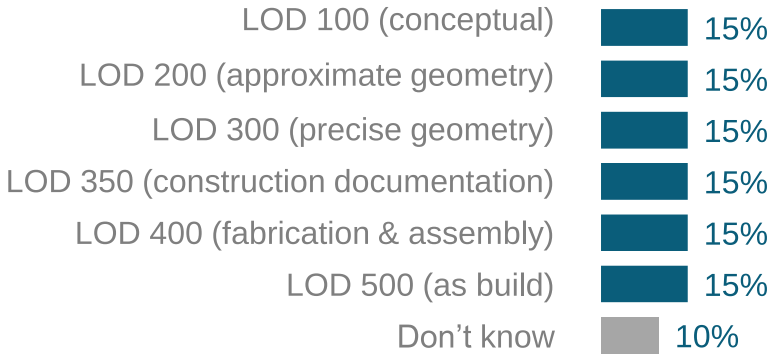


Using the BIM model for prefabrication of products regardless of who is prefabricating



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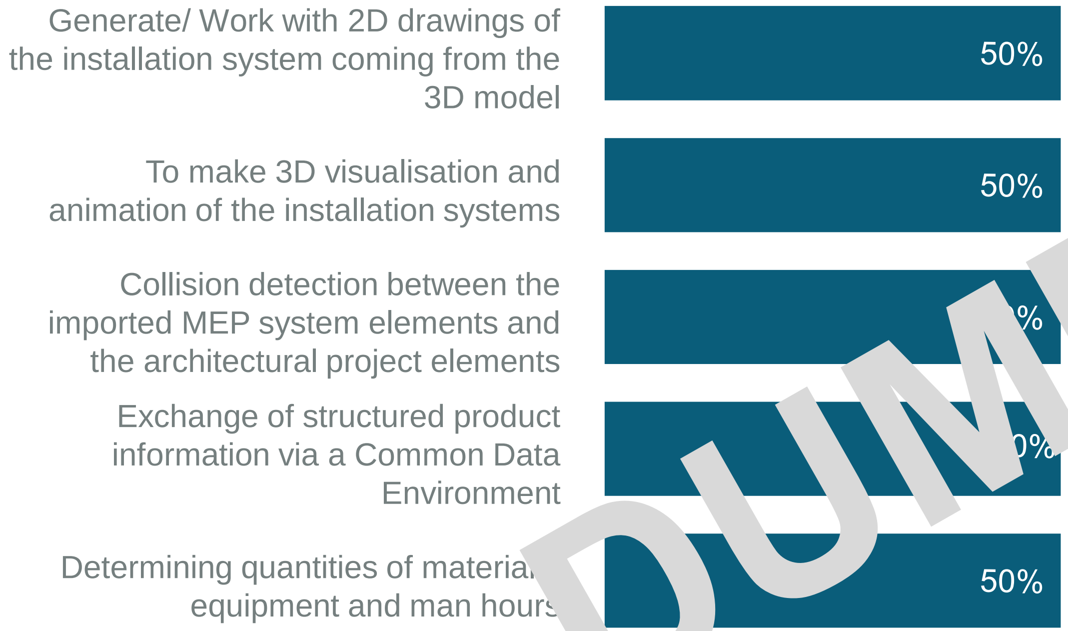
Most relevant features of BIM for the BIM users – Top 5

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

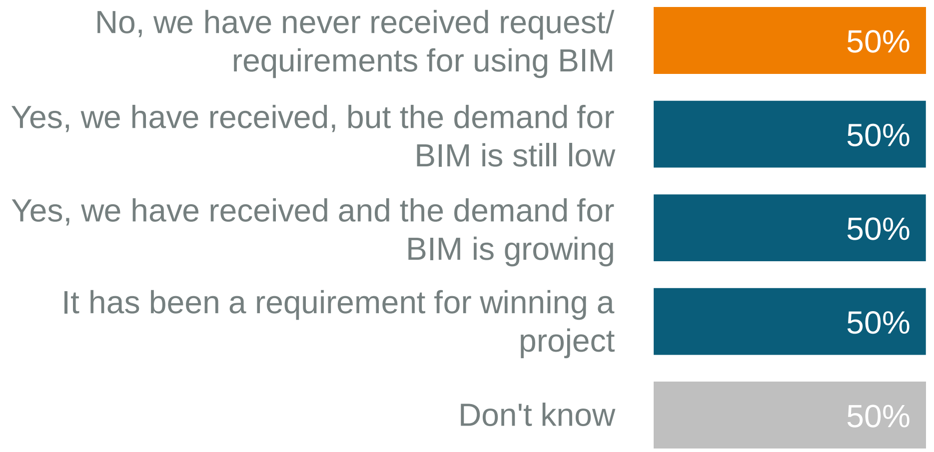


Interest in plug-in tools

Q: Some manufacturers offer plug-in to… mpatib… wi… software. Is this interesting for you or do you already use this?

BIM users with requests from clients for working in BIM or BIM as a requirement 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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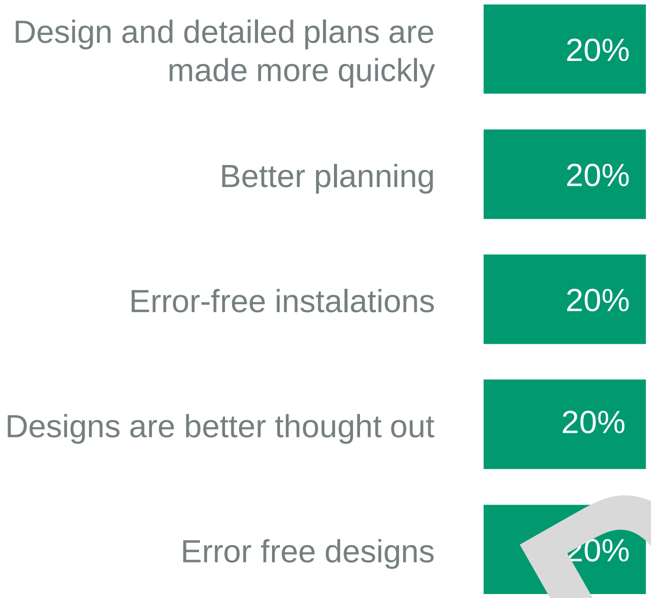
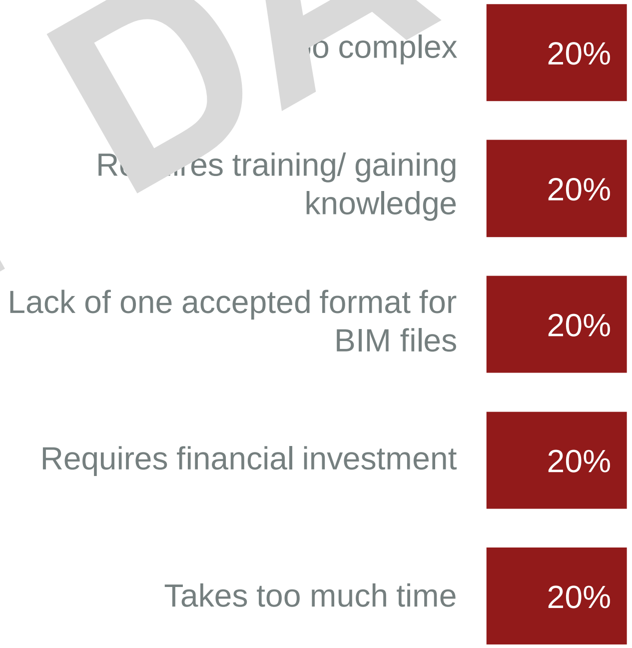
Greatest advantages of BIM – Top 5

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



Disadvantages of BIM – Top 5

Q: What do you consider to be the greatest limitations or pain points of BIM?



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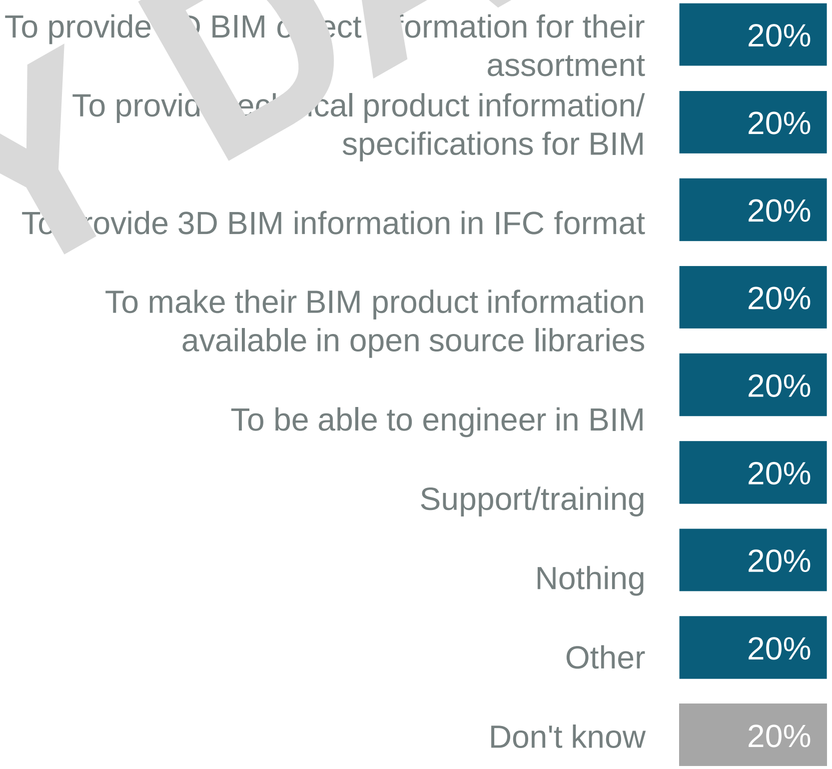
BIM as a support for reducing Building Carbon Footprint

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

Expectations towards manufactures in relation to BIM – BIM users

Q: What do you expect from the manufactures of HVAC/plumbing products in relation to BIM?



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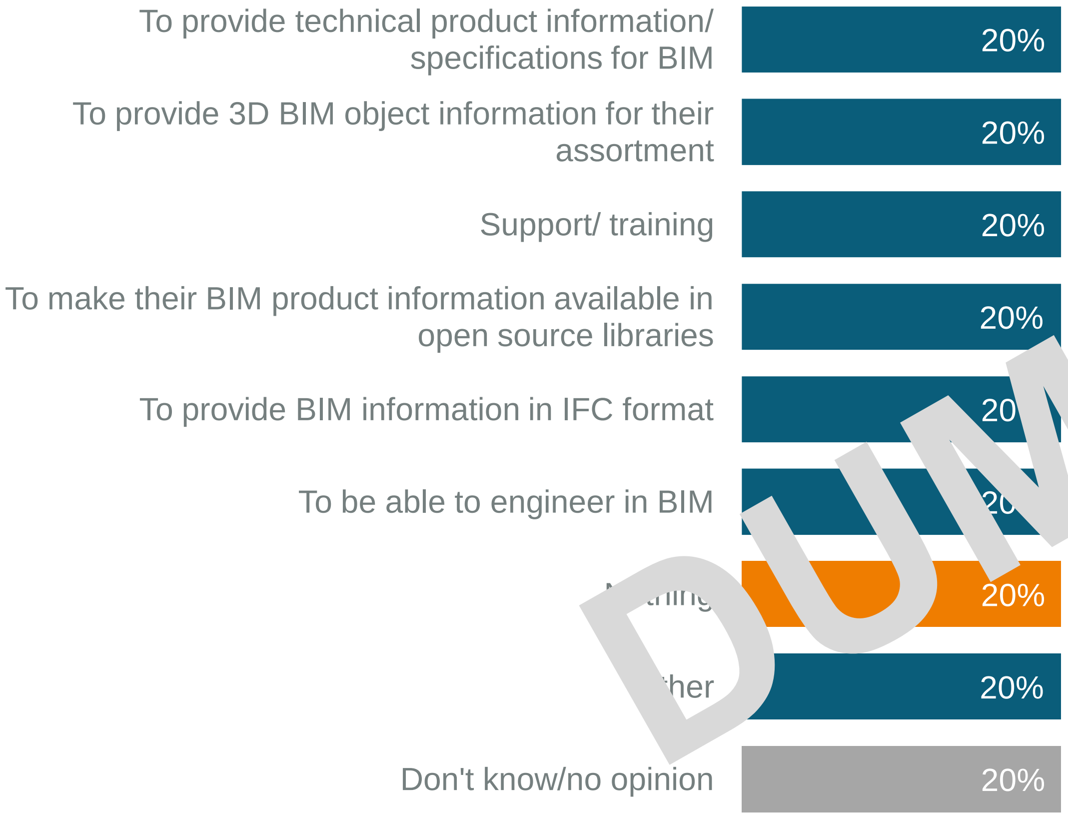
Expectations towards manufacturers in relation to BIM – if aware of BIM

Q: What do you expect from the manufacturers of HVAC/ plumbing products in relation to BIM?



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Attitudes towards BIM – if aware of BIM

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

(Strongly) agree | **Neither agree nor disagree** | **(Strongly) disagree** | **Don't know**

BIM is relevant only for installation companies **working on big projects**

BIM will lead to major changes in the way the different parties collaborate in a construction project

Installers do not need to work in BIM, as they just have to install the HVAC systems according to the drawing

BIM is **relevant for all manufacturers** of HVAC and plumbing products regardless of their size

There is an **increasing need of BIM data** from HVAC and plumbing manufacturers

There is an **increasing need of information from manufactures** about BIM as a planning method

We **have enough knowledge** about BIM and our role in BIM

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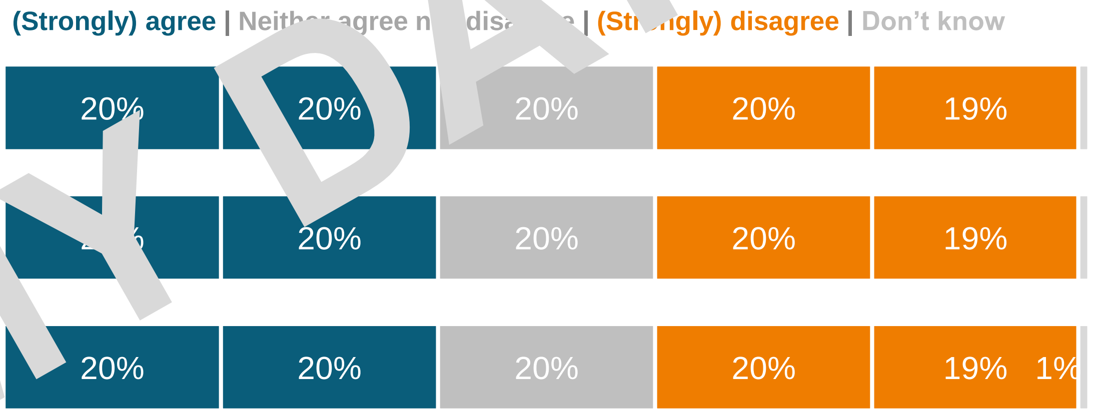
Attitudes towards BIM – BIM users

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

The execution of the project **meets initial planning better** when designed in BIM

Failure costs are low[illegible] in projects designed in BIM than in projects that are [illegible]

Costs of **BIM-designed projects are more in line with the ini**[illegible] projects not [illegible]



Failure costs savings due [illegible] BIM [illegible]

Q: Can you give a rough estimatio[illegible] ow muc[illegible] (in p[illegible]ntage) the failure costs are lower, when projects are designed in BIM?

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

XX%

Index

E/C ROOM
MEETING ROOM 1
MEETING ROOM 2
RECEPTION HALL
INDOOR DINING
KITCHEN
FIRE

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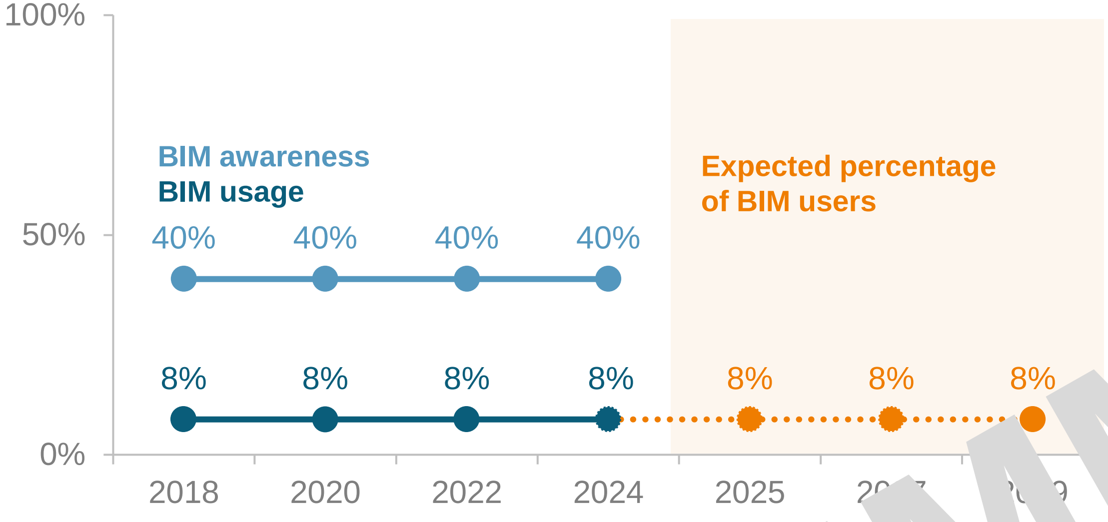
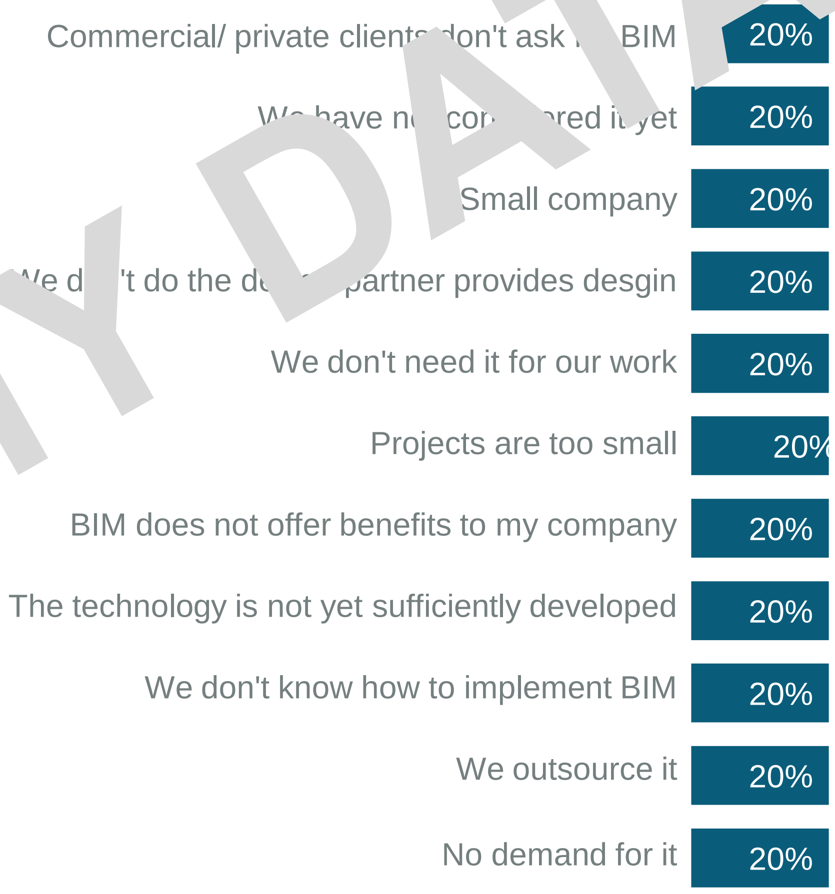
BIM awareness and usage over time



Base: asked to all installers

Reasons for not using BIM



Base: if aware, but not working with BIM

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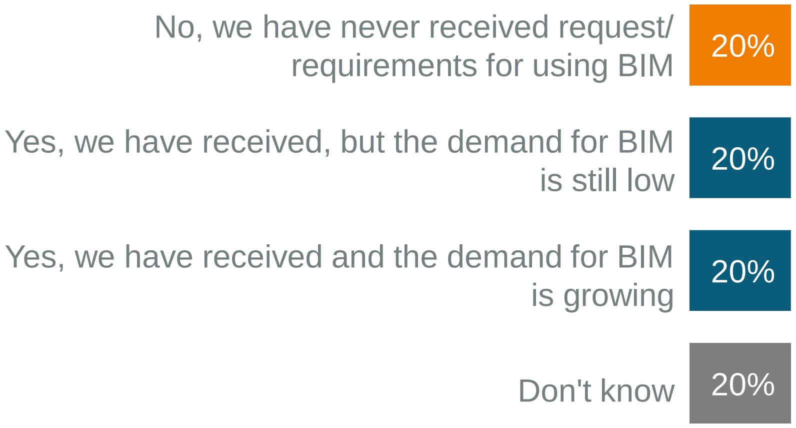
Received requests or requirement for using BIM

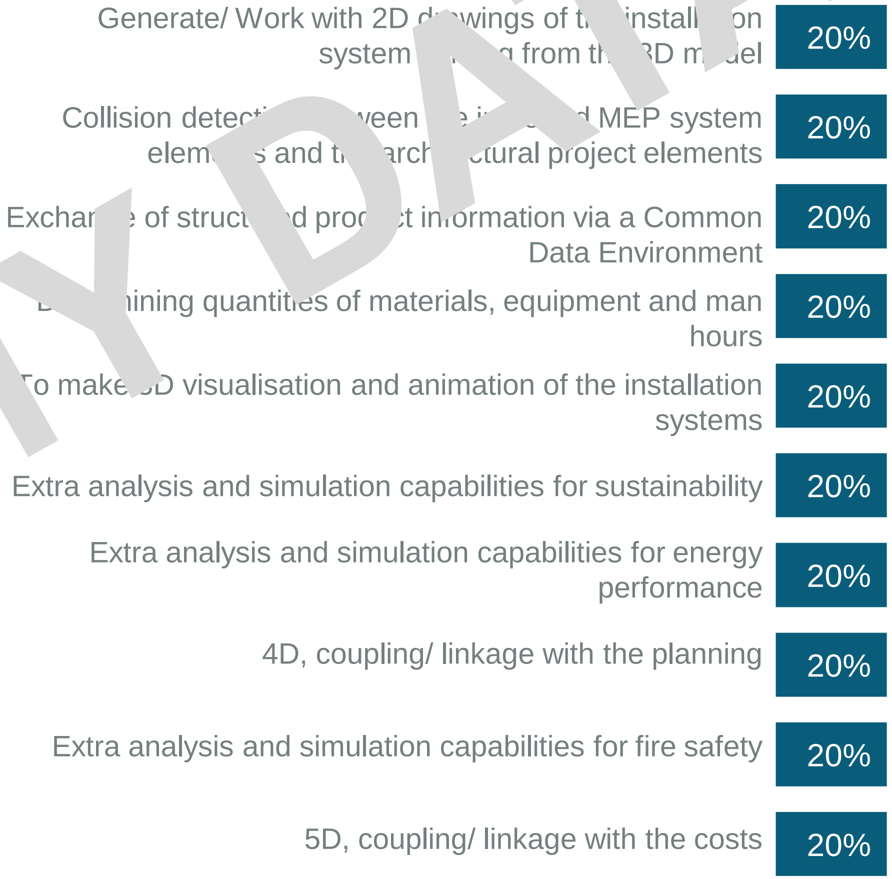
Q: Have you already received any requests from investors/ clients for working in BIM or has it been a requirement for winning a project?



Base: asked to all installers

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: if at least heard of BIM

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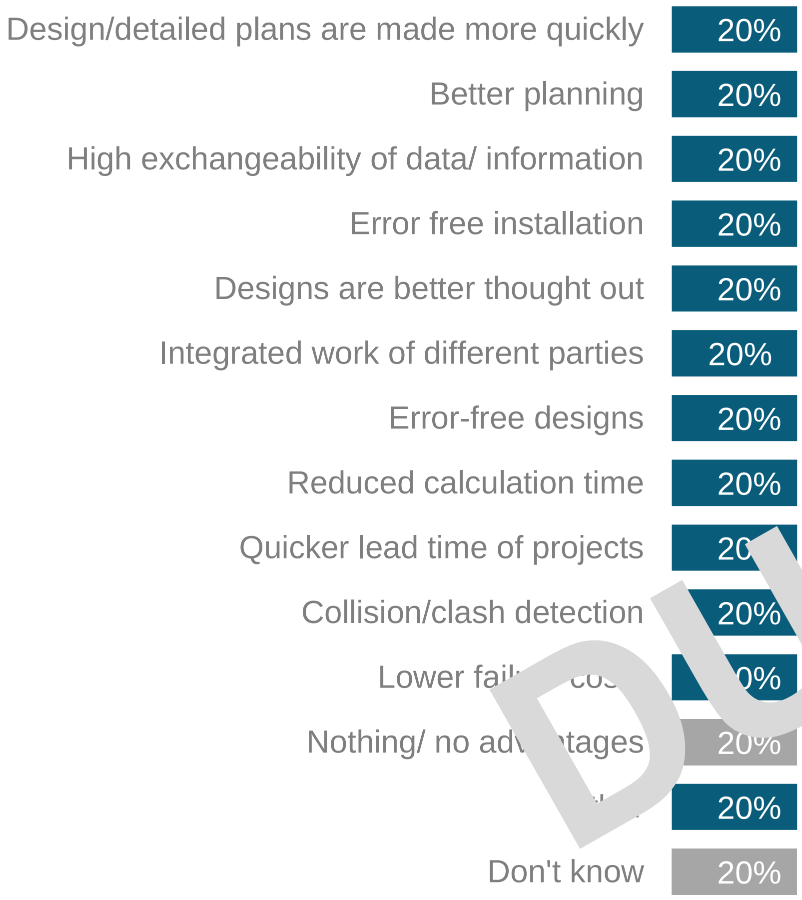
Advantages of BIM

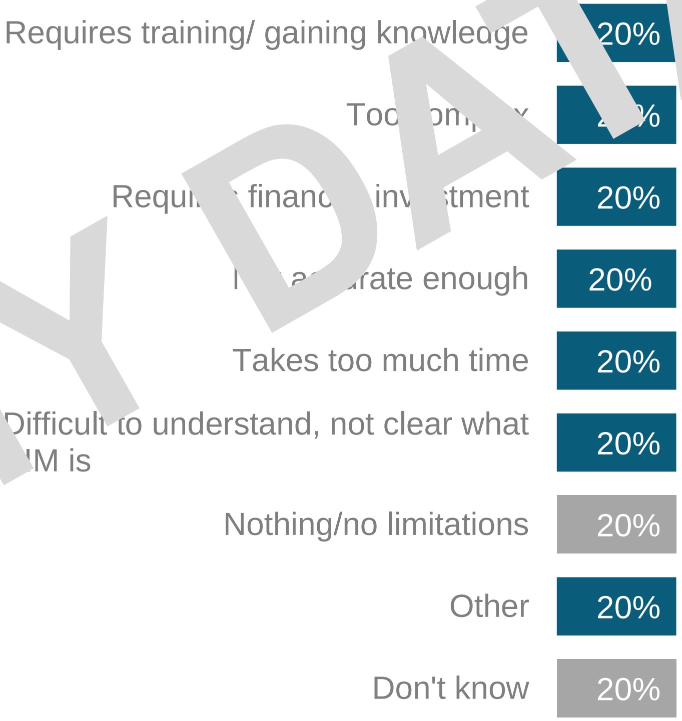
Q: What do you consider the greatest advantages of BIM?



Base: if at least heard of BIM

Limitations of BIM

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



Base: if at least heard of BIM

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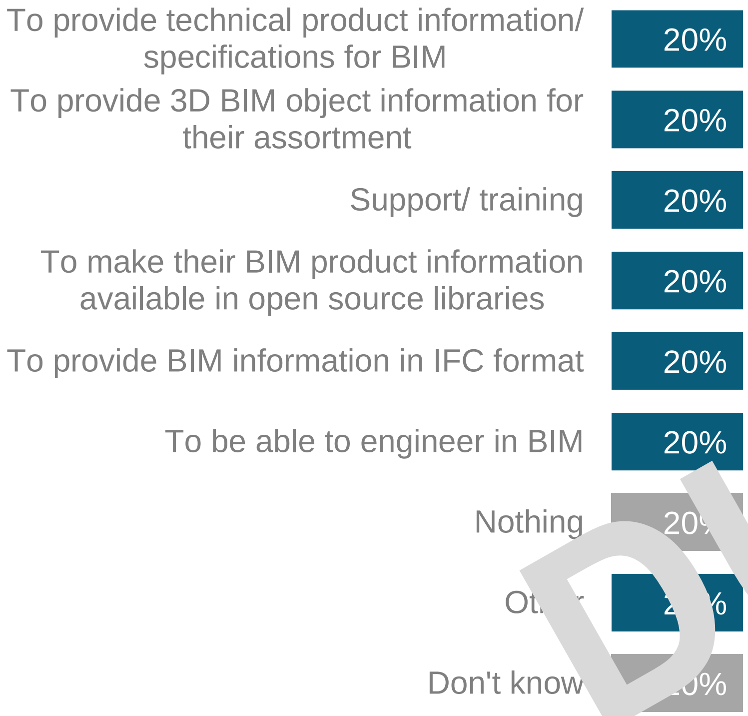
Expectations towards manufactures in relation to BIM

Q: What do you expect from the manufactures of HVAC/plumbing products in relation to BIM?



Base: N= If at least heard of BIM

Reducing Building Carbon Footprint

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

Base: N= If at least heard of BIM

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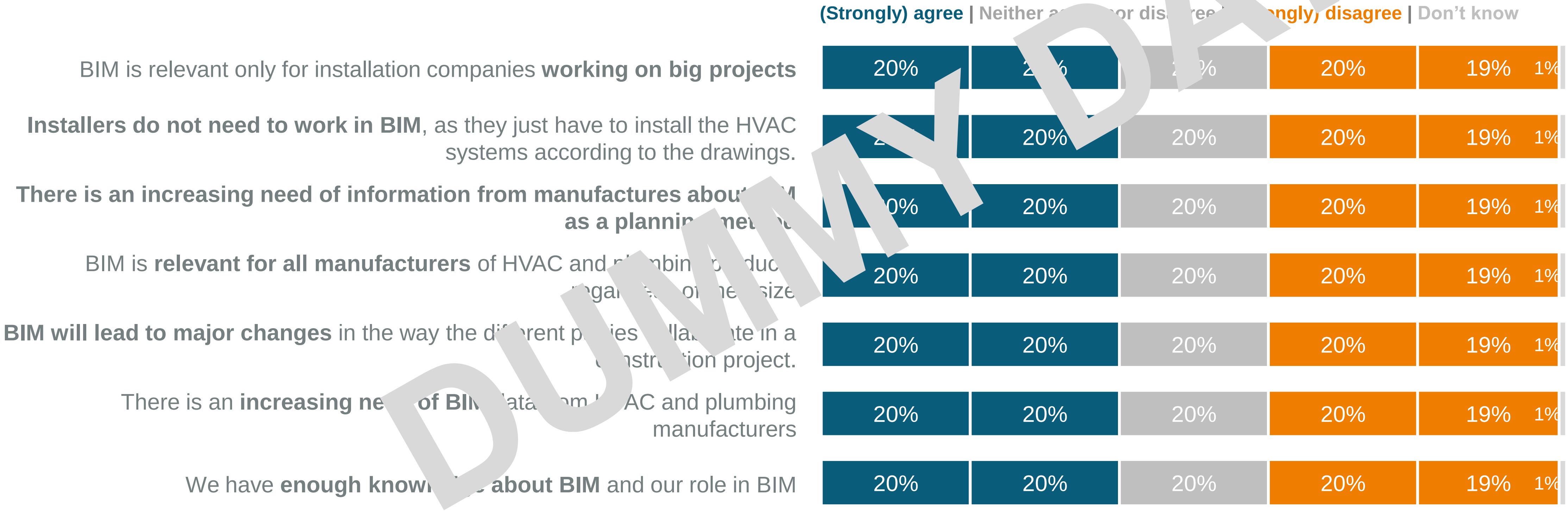
Attitudes towards BIM

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



Base: n= If at least heard of BIM

Index

E/C ROOM
MEETING ROOM 2
FIRE
RECEPTION HALL
INDOOR DINING
KITCHEN

Respondents' background characteristics

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

What is your position within the company?
Yourself included, how many full-time employees does your company have in total, in all branches?

	UK	Germany	France	Poland	Belgium	Netherlands
Owner / Director/ Manager	82%	56%	58%	79%	80%	61%
Plumber/ installer	2%	12%	2%		1%	2%
Buyer/purchaser	3%	6%	1%	0%	2%	1%
Senior buyer/ Senior purchaser	2%	8%	1%	3%	2%	0%
Engineer/designer	3%	4%	3%	6%	1%	2%
Calculator	1%	0%	31%		8%	9%
Project manager	5%	14%	4%		3%	8%
Other	2%	0%	0%	0%	3%	16%
1 - 4 FTE	41%	27%	42%	52%	69%	40%
5 - 14 FTE	33%	40%	38%	18%	18%	24%
15+ FTE	26%	33%	20%	30%	13%	37%

About USP

USP Marketing Consultancy

Head office

Rotterdam

Subsidiaries

Düsseldorf **Zagreb**

Total

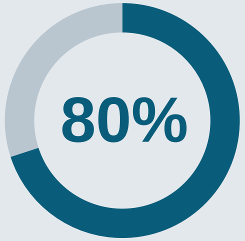
Market specialist
installation, construction, home improvement and real estate

Dedicated and multi-client research

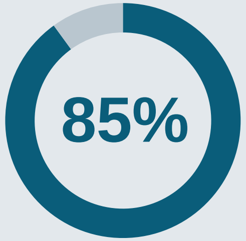
Active in the market for 29 years

250+ dedicated market research projects annually

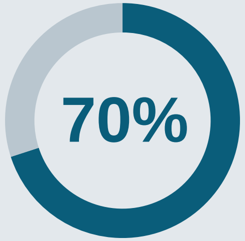
Revenue distribution



turnover coming from **international projects**



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



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

Research in
38
countries in 2023

43
focus groups

1,778
in-depth interviews

60,353
B2B CATI interviews

101,022
B2C online interviews

Single client research

Examples

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

Dedicated market research

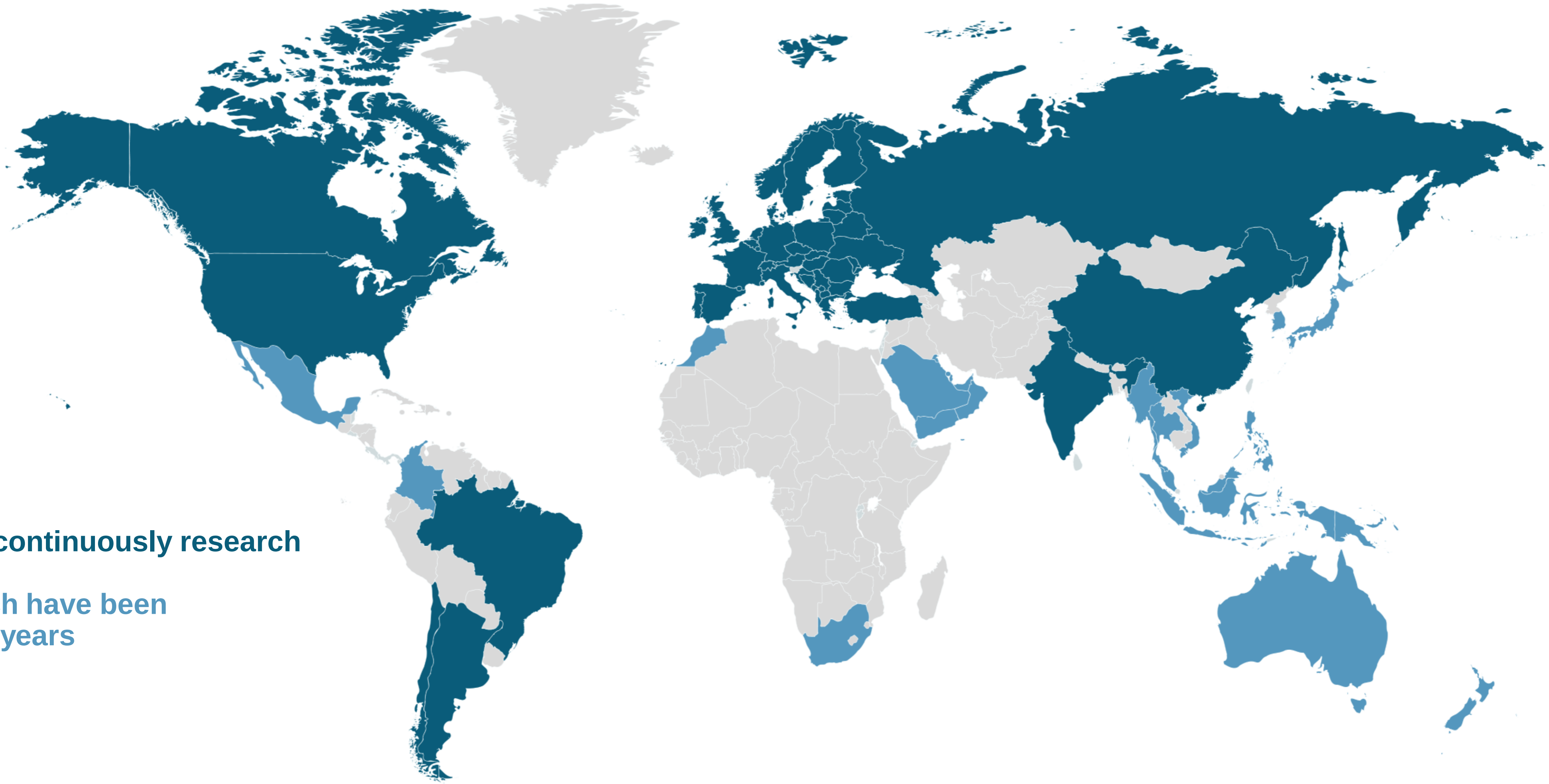
- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitive research or a combination of both
- Within our market specialism, all types of researches can be conducted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

multi-client research

USP

	European **Architectural** Barometer	European **Contractor** Monitor	European **Mechanical Installation** Monitor	European **Electrical Installation** Monitor	European **Painter Insight** Monitor	European **Home Improvement** Monitor	European **Handyman** Monitor
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers	Handyman
Methodology							
Annual sample size	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews	3,400 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	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly	Annually
2024 Theme topics	• Q1: Future of construction • Q2: Trends in material usage • Q3: DMU • Q4: Smart materials and buildings	• H1: Prefab • H2: BIM	• Q1: BIM • Q2: Prefab • Q3: Smart and connected products • Q4: Media orientation	• Q1: Sustainability • Q2: Smart and connected products • Q3: Services in the installation market • Q4: Prefab	• Trend tracking • Brand funnels • Sustainability	• Q1: Orientation; sustainability • Q2: Purchase Channels; smart homes and products • Q3: Branding; private labels • Q4: DIY vs DIFM; plans for 2024	• Trends in material usage • Branding

Country coverage



Countries which we continuously research

Other countries which have been researched in past 2 years

USP

A selection of USP Marketing Consultancy's clients

Construction	Installation	DIY	Living & Real Estate
ASSA ABLOY	ABB	adeo	tiwos tilburgse woonstichting
3M	BOSCH	OBI	bpd
FLEX Das Original	GIRA	Dulux	Stadgenoot
DÖRKEN	SFA	tesa	AM
VELUX	GRUNDFOS	3x3	volkshuisvesting Arnhem
Tarkett	hager	GROHE	Gemeente Rotterdam
BMI	sonepar	Villeroy & Boch	Habion
FESTOOL	Schneider Electric	MTD For A Growing World	syntrus achmea real estate & finance
fischer innovative solutions	LG Life's Good	Bostik smart adhesives	3B Wonen
KNAUF	PIPELIFE	KÄRCHER	CBRE
DAW	KALDEWEI	hansgrohe	Staedion
TRESPA	MITSUBISHI ELECTRIC	UNILIN	van den Bruele vastgoed
Forbo	Panasonic	WAGNER	Oosterpoort
ROCKWOOL	TRILUX SIMPLIFY YOUR LIGHT	KOHLER	AT OSBORNE
DSM	uponor	Intergamma	Wayland Real Estate
REYNAERS aluminium	VIESMANN	maxeda DIY Group	Schiphol Real Estate
WD-40	Vaillant	ALLEGION	Haag Wonen
PPG	WOLF	BRIGGS & STRATTON	Gemeente Utrecht
Technische Unie	EMERSON	cromology	parteon
AkzoNobel	wavin	Ideal Standard	'thuis
SIG	GEBERIT	ShurTech Brands	DEGOEDEWONING
Wienerberger	DAIKIN	Yale	WOONVIZIER
SAINT-GOBAIN	Signify	UHU	Leystromen verbindend | ondernemend
Sika	ROTHENBERGER	PPG	zowonen

USP Marketing Consultancy