



European Contractor Monitor H2-2022

Digitalization and BIM

January 2023

About European Contractor Monitor

THE GOAL

To get a picture of the economic situation in the construction market among contractors on a European scale and to get insights into the usage of prefabricated solutions by main contractors. This research is done bi-annually, with registered contractors divided over the 8 major European markets.

THE RESEARCH TOPICS

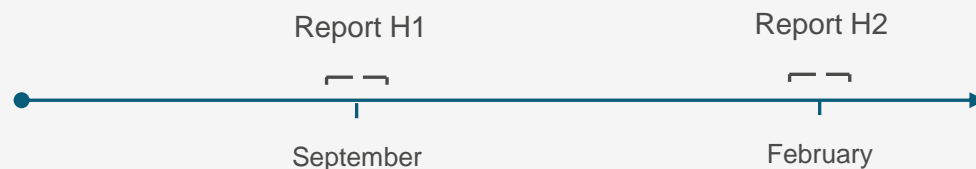
Recurring topic: Economic developments of construction companies in Europe (order book and turnover development)

Bi-annual theme topics in 2022:

H1: Prefab

H2: Digitalisation and BIM

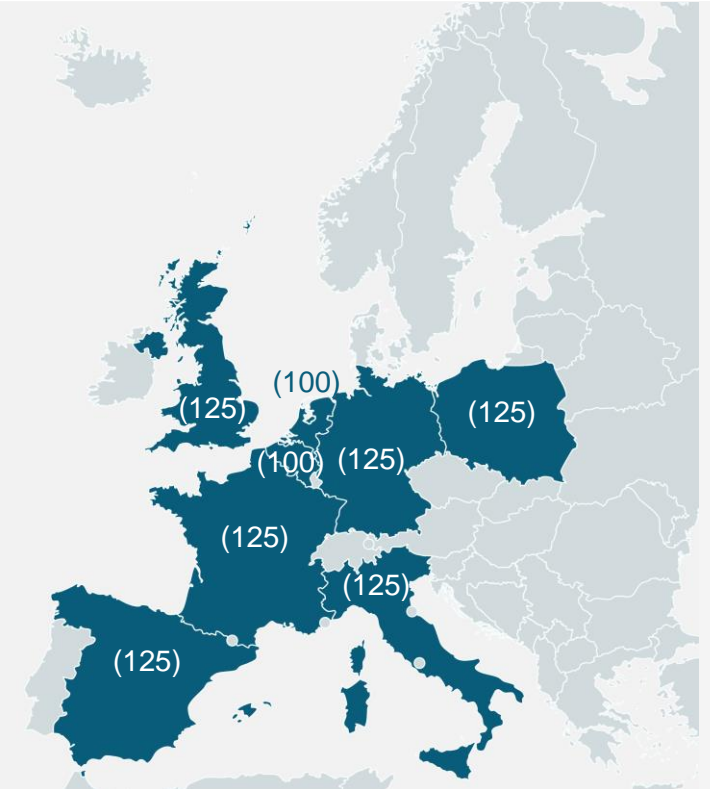
THE TIMELINE



COUNTRY SCOPE

Total of 957 Phone interviews

Background characteristics of the interviewed respondents can be found in [the country-specific profiling the contractor chapter](#).



PROJECT TEAM



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About target group & methodology

Surveying construction companies...

Mid-sized (5 to 15 employees) and **large** (more than 15 employees) building contractors who are active both in residential and non-residential segments are interviewed. Most interviews are conducted with owners/ directors or with purchasers of these companies.

... selected from a country-representative database

USP possesses an **international database of construction companies**, which is constantly updated. Therefore, respondents are 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 upon. These phone calls are made **by fixed fieldwork partners, located in the respective countries.**

... centralised and continuous quality control

Results in each country are monitored by the USP project team throughout the fieldwork period. We implement our extensive experience in order to **make sure the answers are of high quality and provide the insights that meet the goal of the project.**



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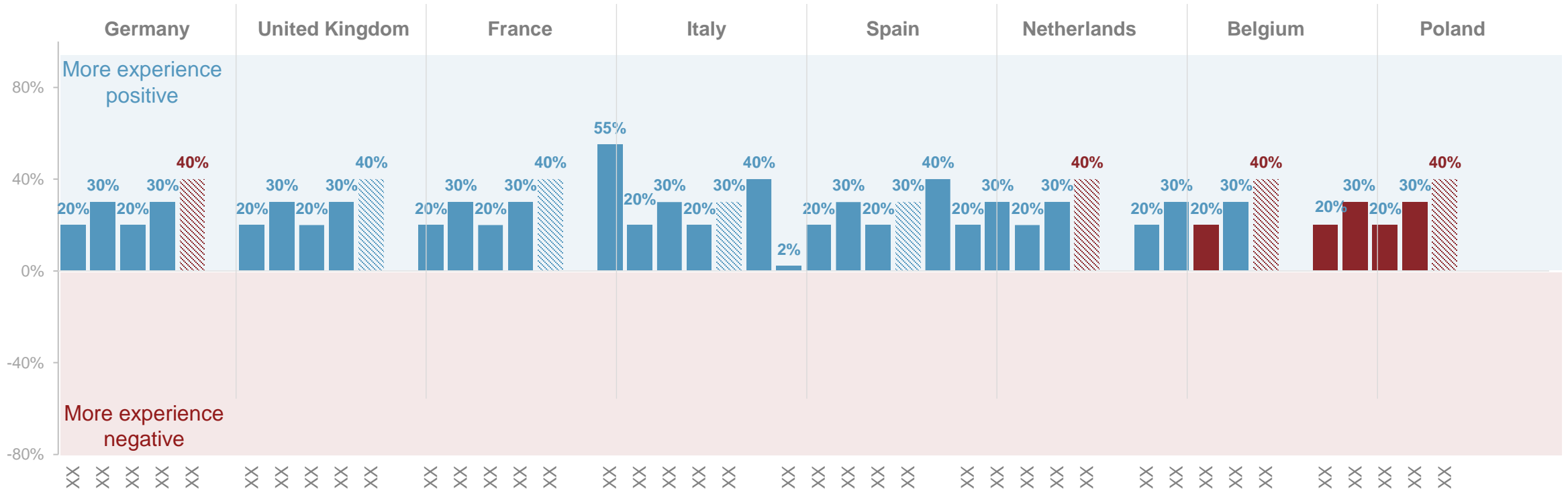


Turnover development

Most countries experienced a XX

Net share regarding turnover

If you compare your turnover of XX to XX, how did your turnover develop?



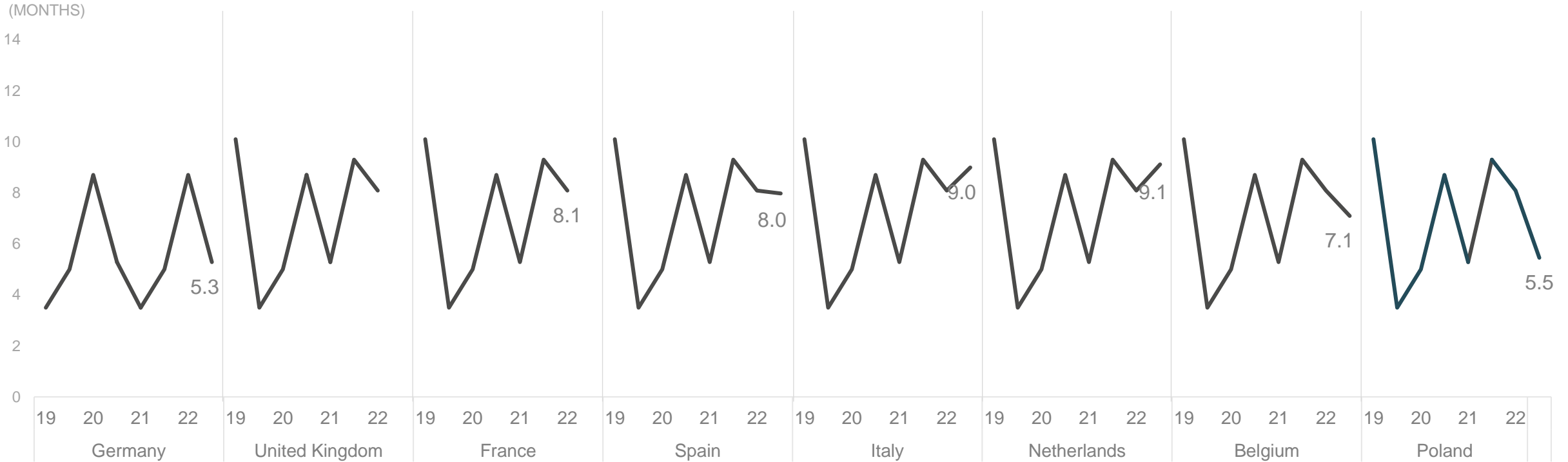
Base: n=XX

Order portfolio

Order books XX

Order portfolio

Question:



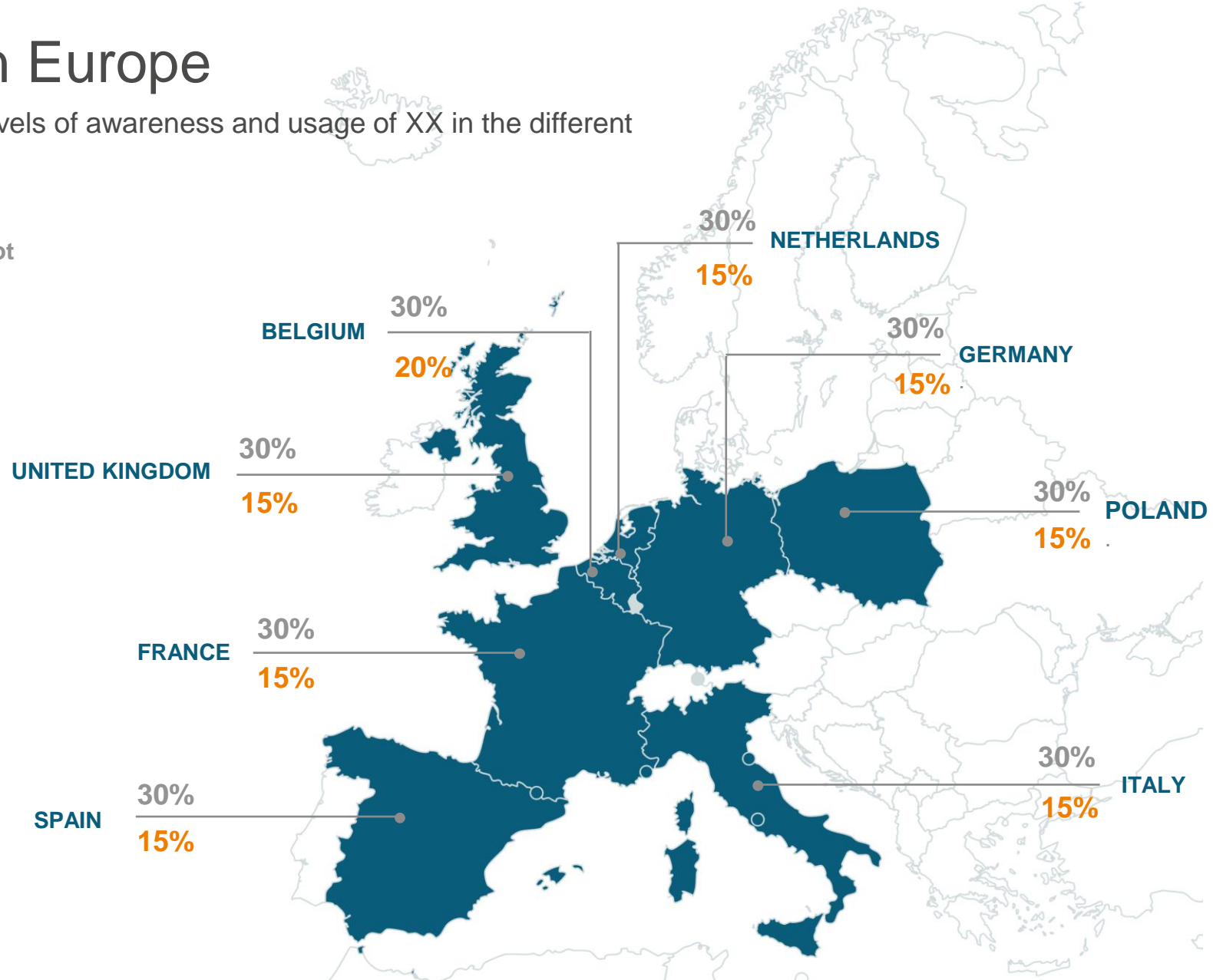
Base: n=XX

XX penetration in Europe

There are big differences in the levels of awareness and usage of XX in the different countries.

% of contractors aware of XX, but not using it in their projects

% of contractors using XX in their projects



Base: n=XX

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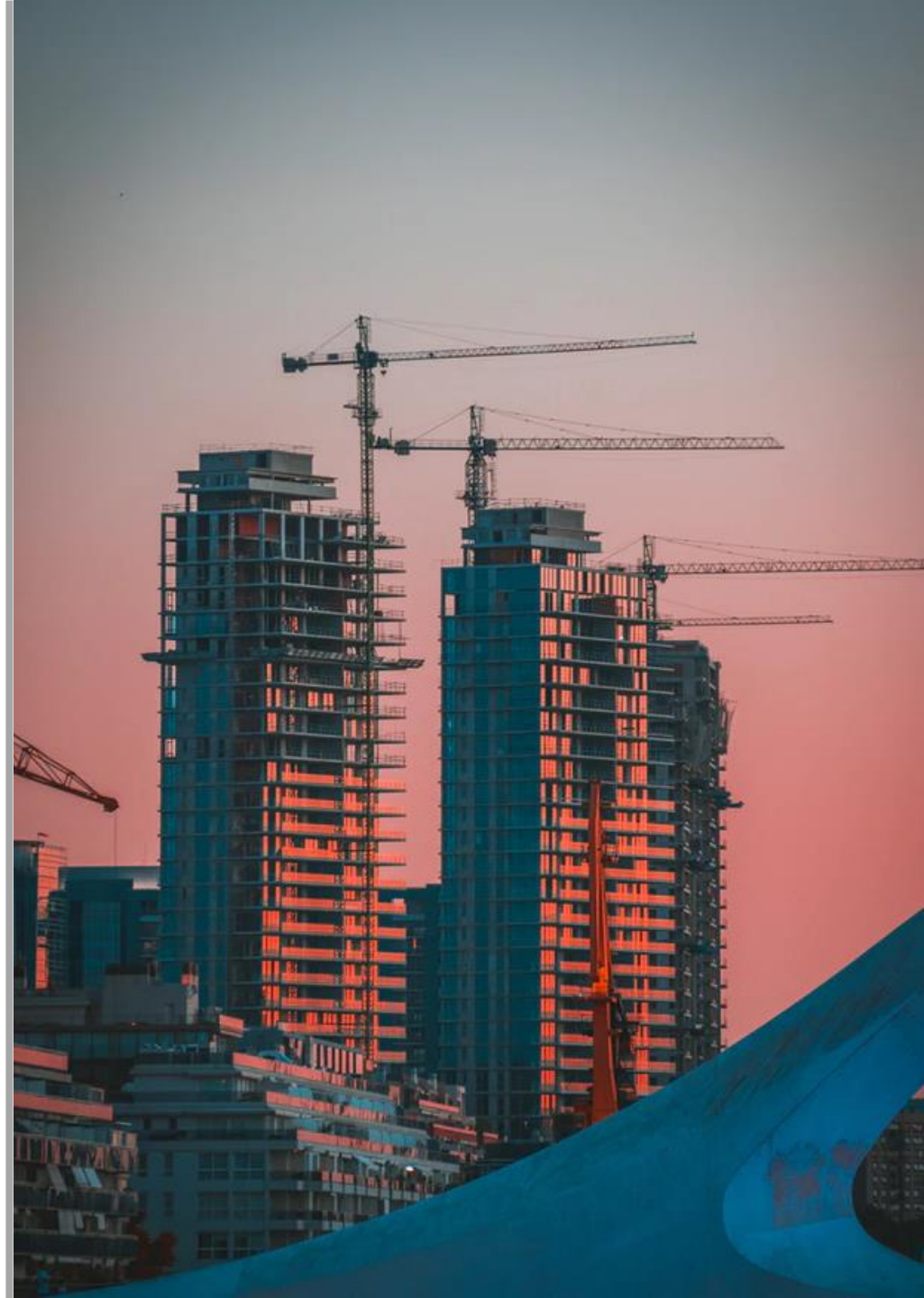
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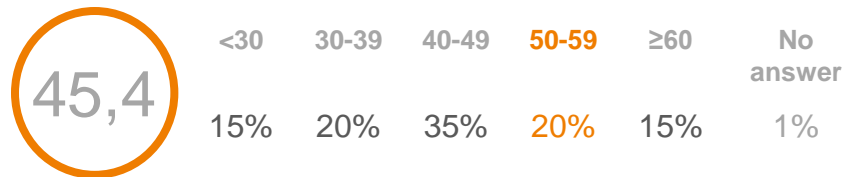
Background characteristics

Company profile

How many **full-time employees** does your company have?



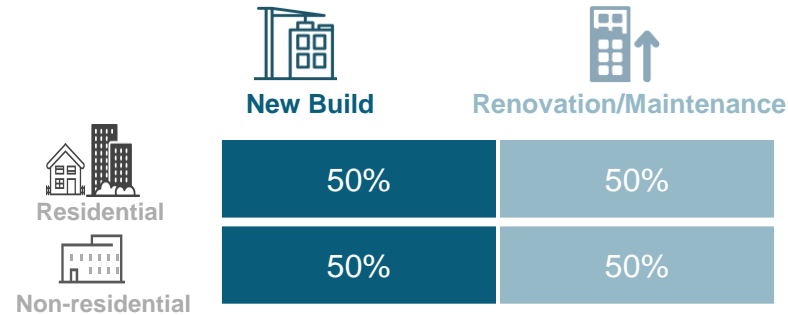
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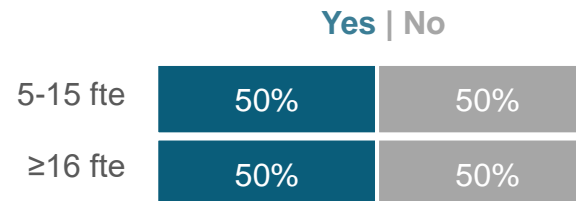
Base: n=XX

Project segmentation

What percentage of XX do you get XX?



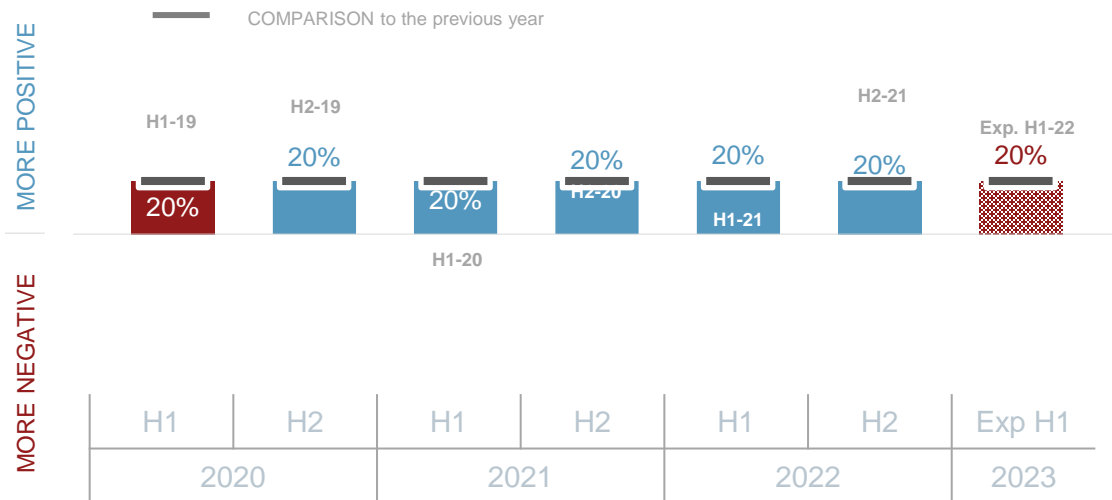
Does your company develop and build projects themselves?



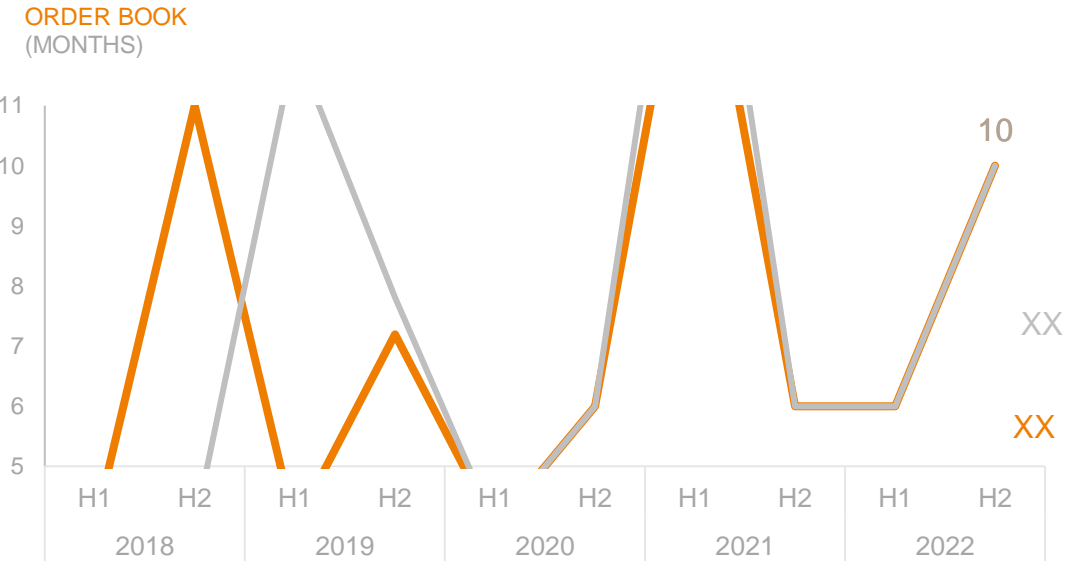
The order book of XX 2022

Net share of contractors' experience regarding turnover
*If you compare your turnover XX to XX how did your turnover develop?
 What are your **expectations** for the development in XX compared to XX?*

(Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE in their turnover)



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



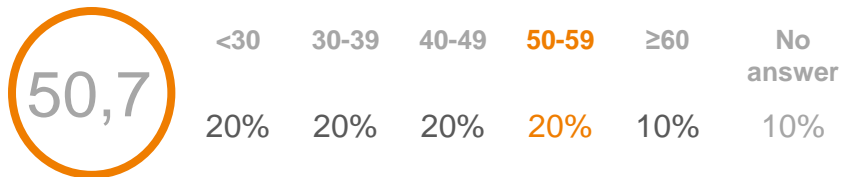
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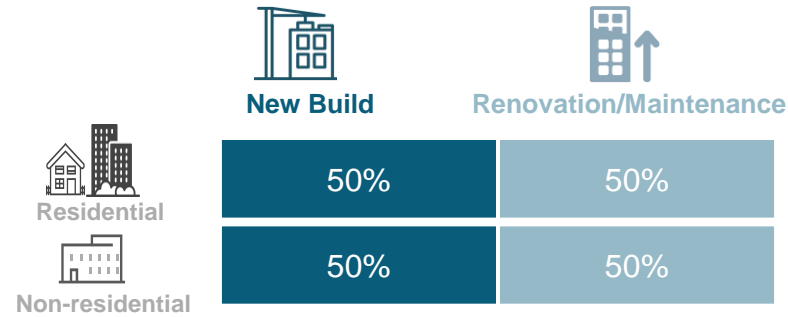
Average age



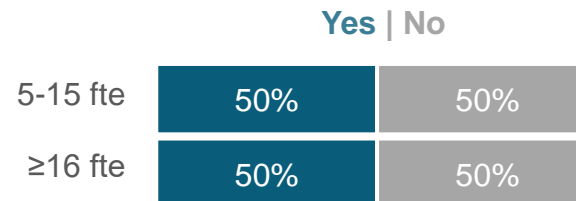
Base: n=125

Project segmentation

What percentage of your residential/ non residential **turnover** do you get **from new build projects**?



Does your company develop and build projects themselves?

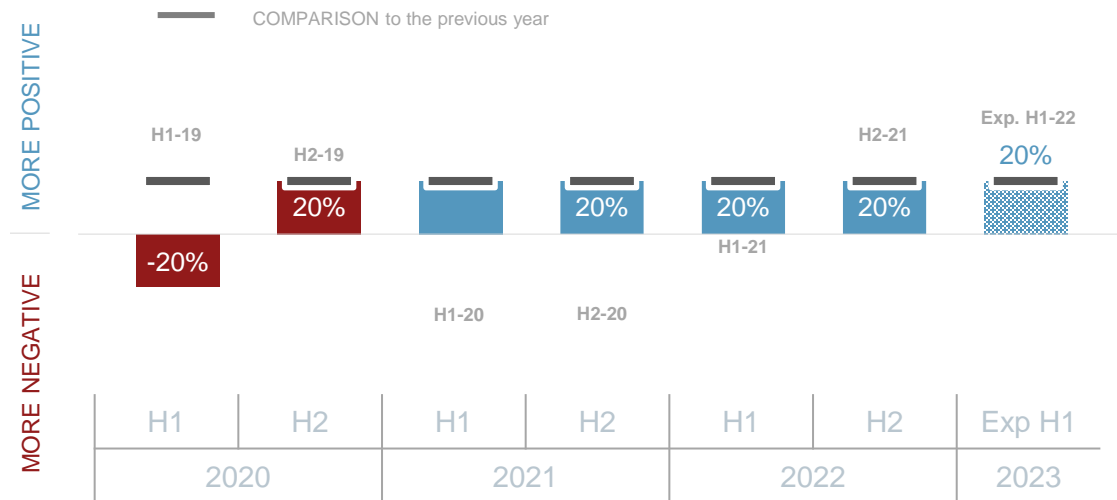


UK contractors are XX about the coming year

Net share of contractors' experience regarding turnover

If you compare your turnover of XX to XX, how did your turnover develop?
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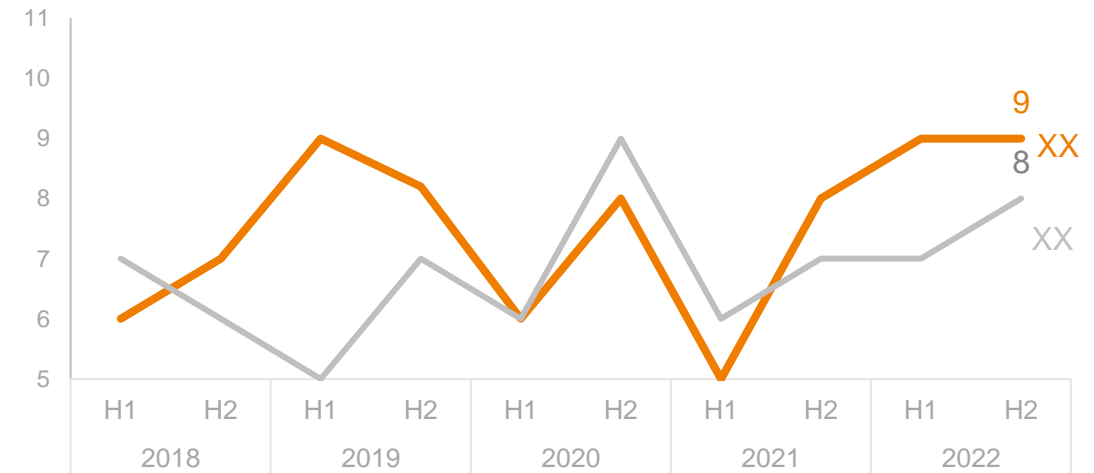
(Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE in their turnover)



How big is your **current order book** portfolio?

For how many months will you be able to keep your current staff working?

ORDER BOOK (MONTHS)



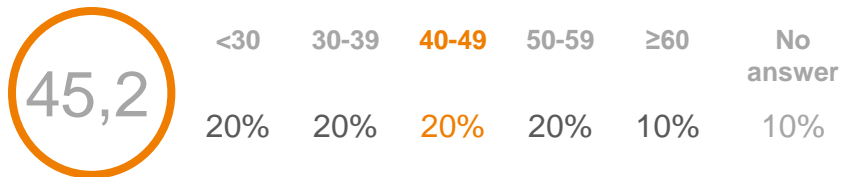
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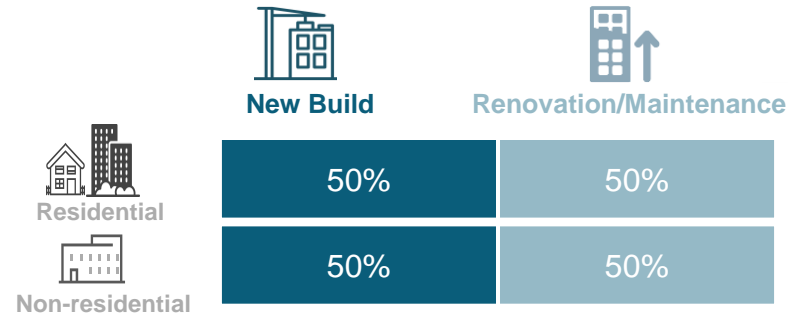
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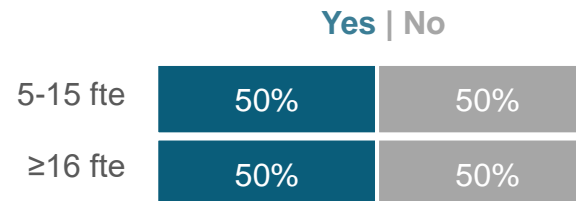
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Project segmentation

What percentage of your residential/ non residential turnover do you get from new build projects?



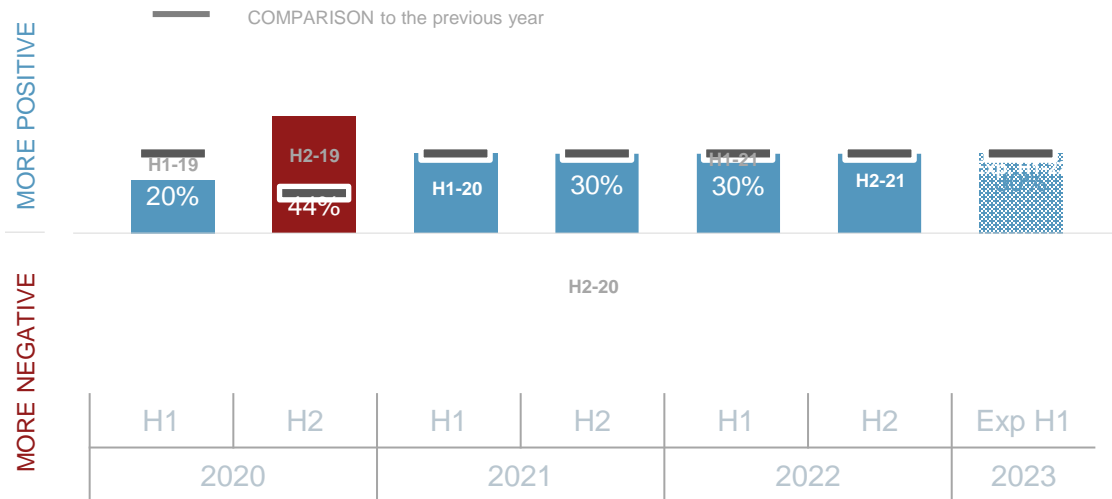
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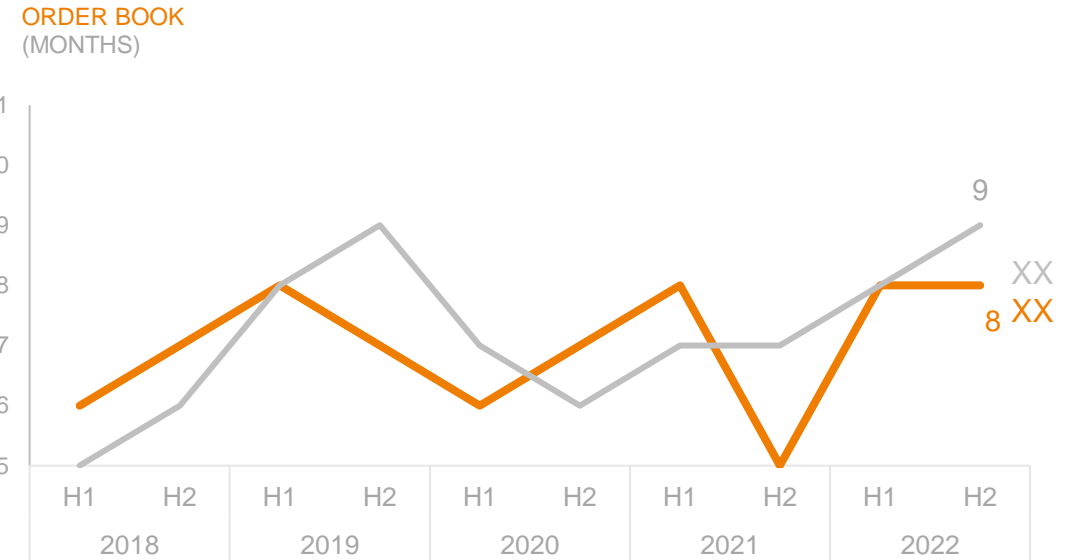
French contractors XX order book in XX

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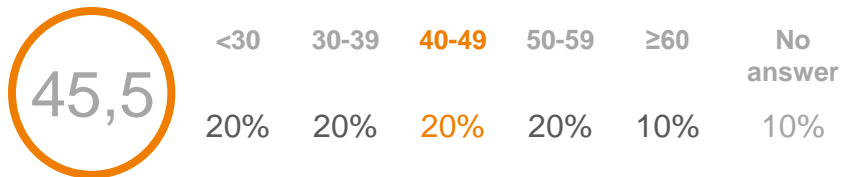
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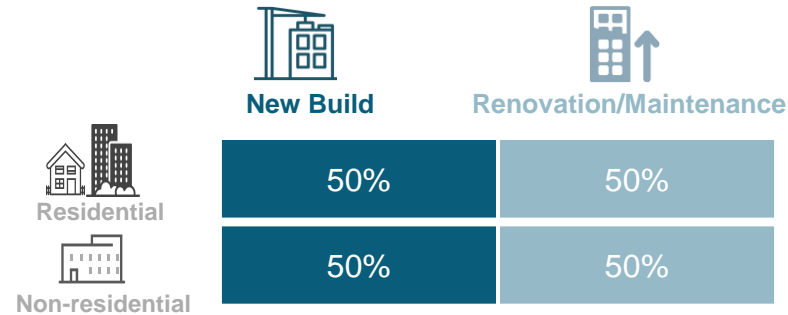
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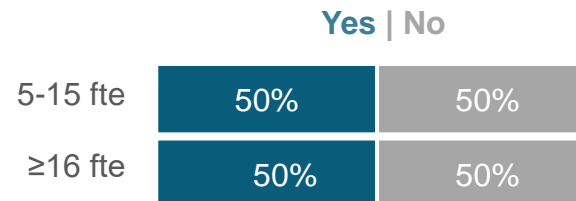
Base: n=XX

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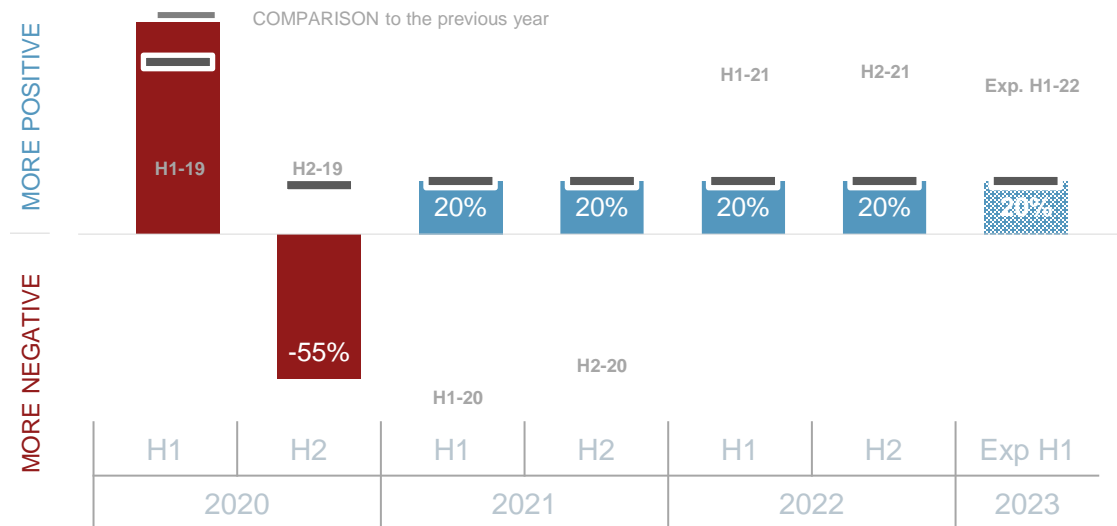


The expectations of Italian contractors are XX

Net share of contractors' experience regarding turnover

If you compare your turnover of **XX to XX**, how did your turnover develop?
 What are your **expectations** for the development in **XX compared to XX**?

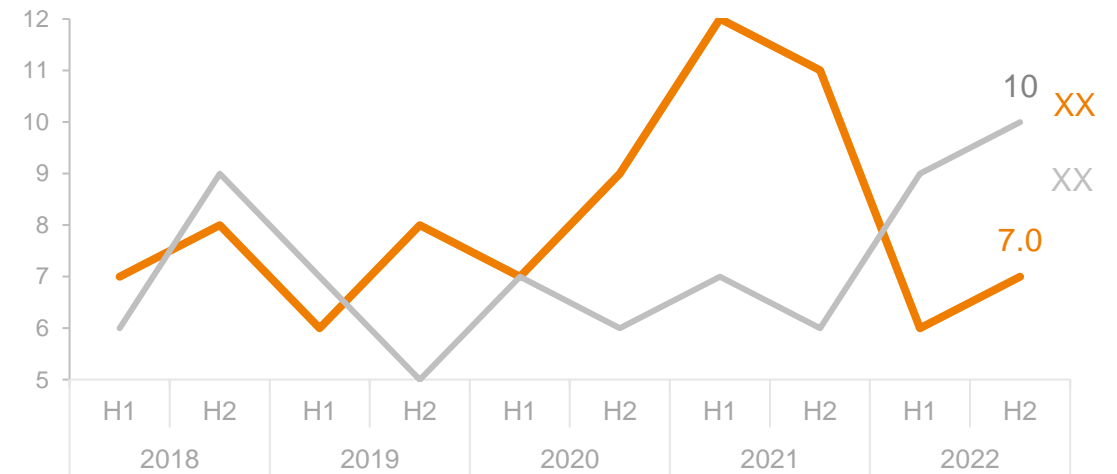
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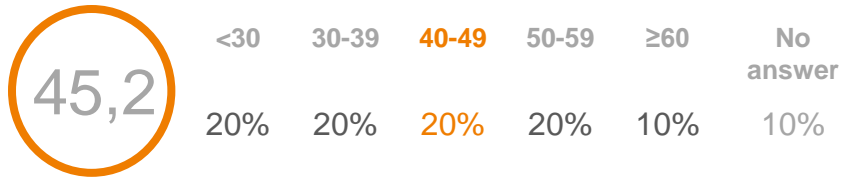
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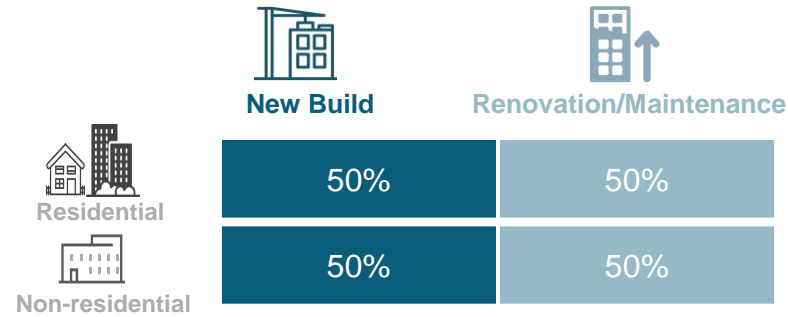
Average age



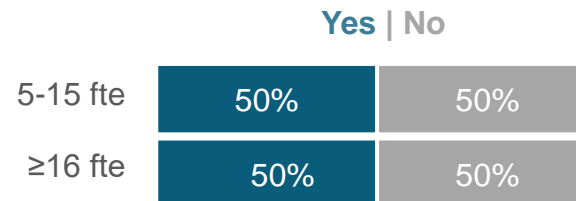
Base: n=XX

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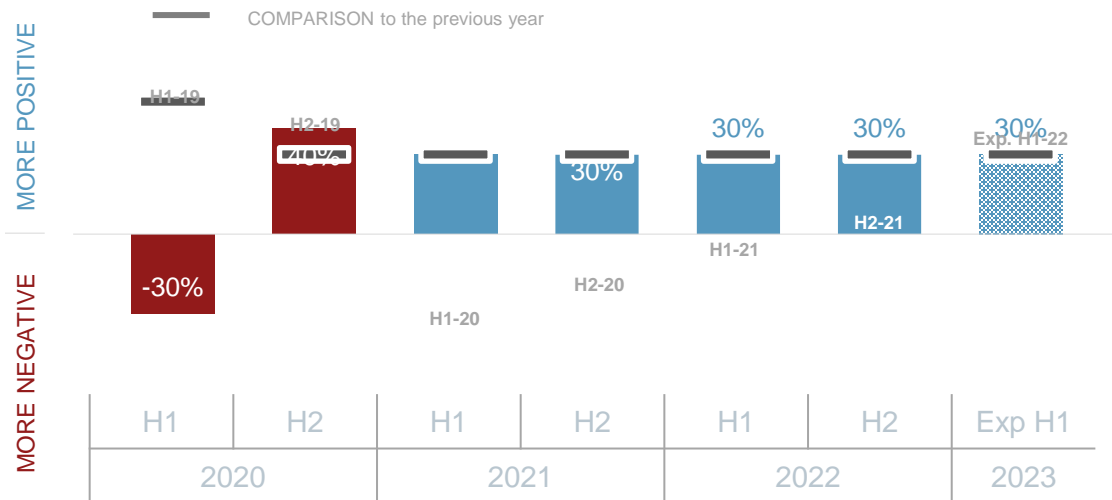
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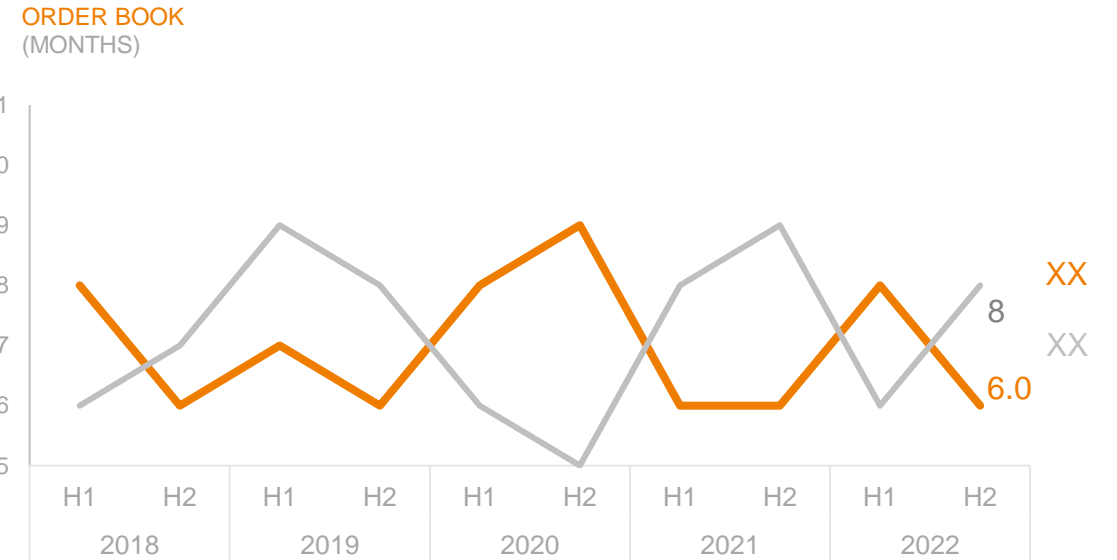
Spanish contractors are a XX for 2023

Net share of contractors' experience regarding turnover
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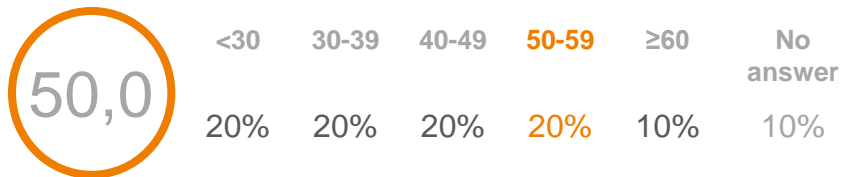
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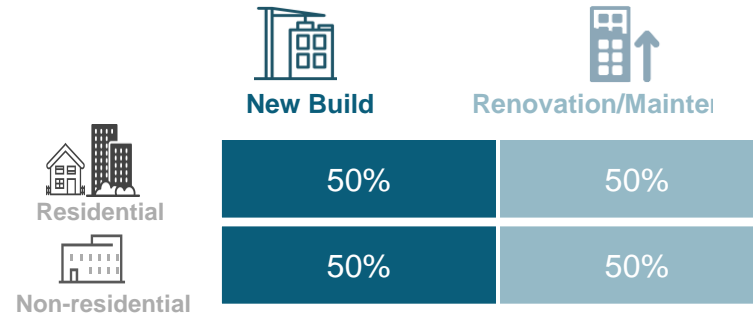
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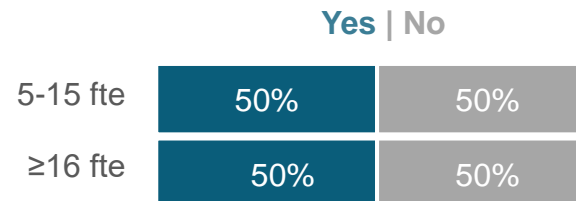
Base: n=XX

Project segmentation

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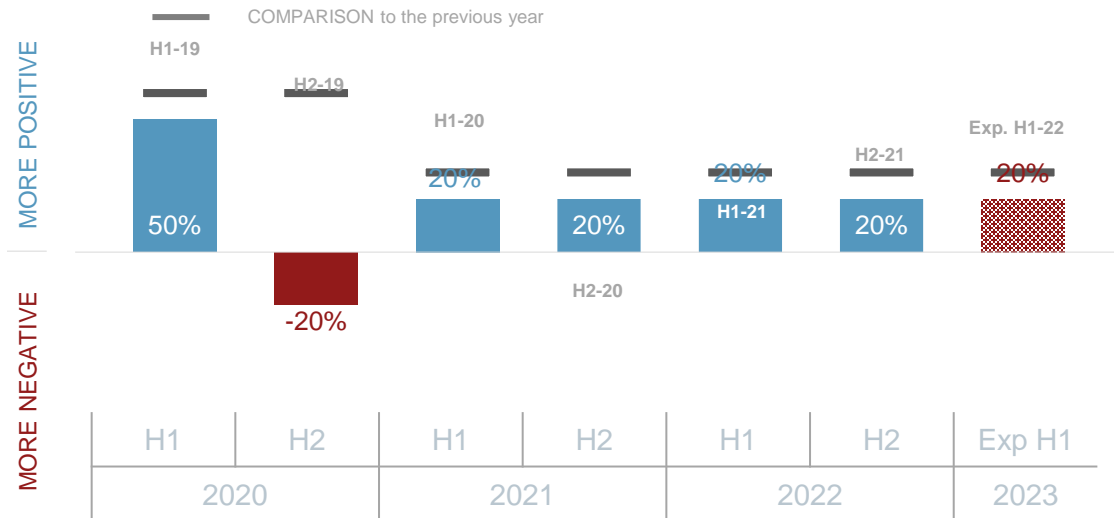


For the first time in two years, Dutch contractors have a XX

Net share of contractors' experience regarding turnover

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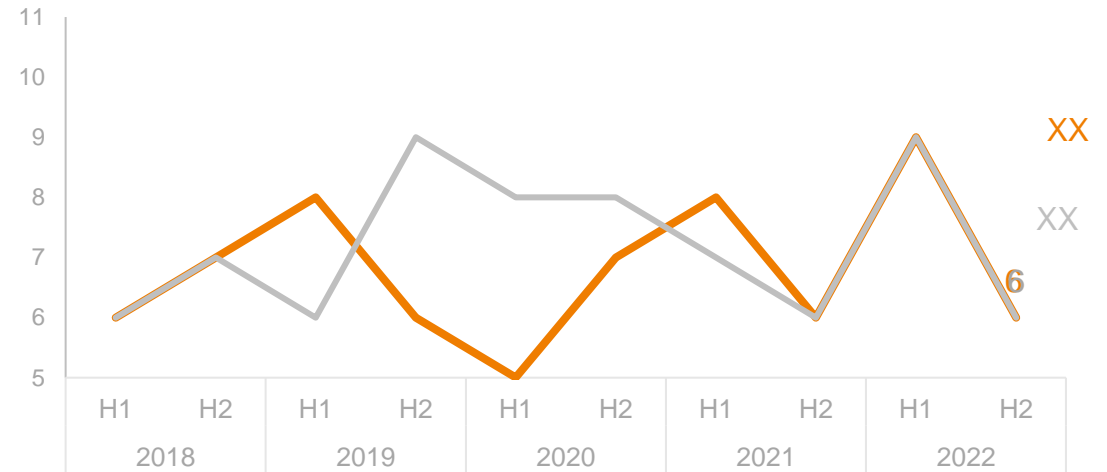
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ORDER BOOK (MONTHS)



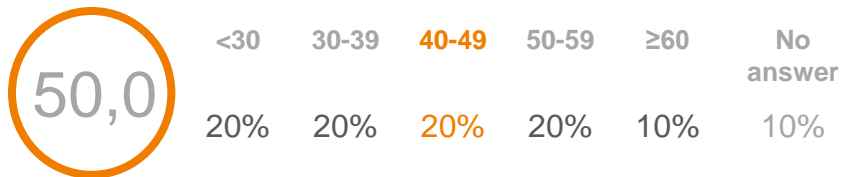
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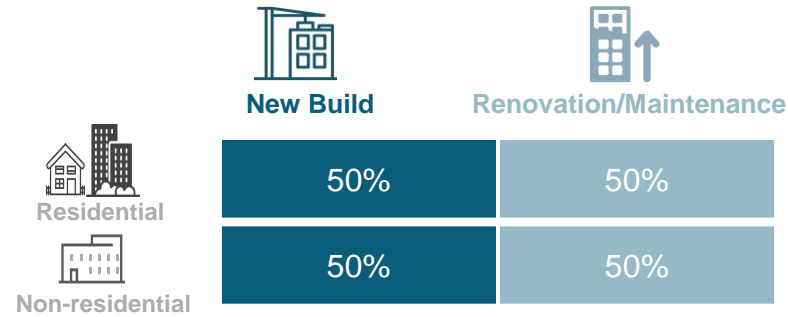
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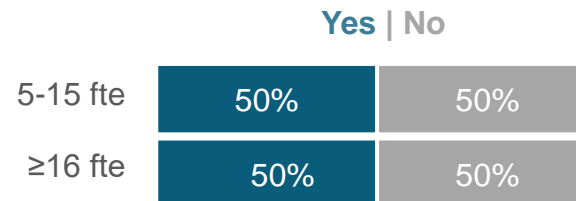
Base: n=,XX

Project segmentation

What percentage of your residential/ non residential turnover do you get from new build projects?



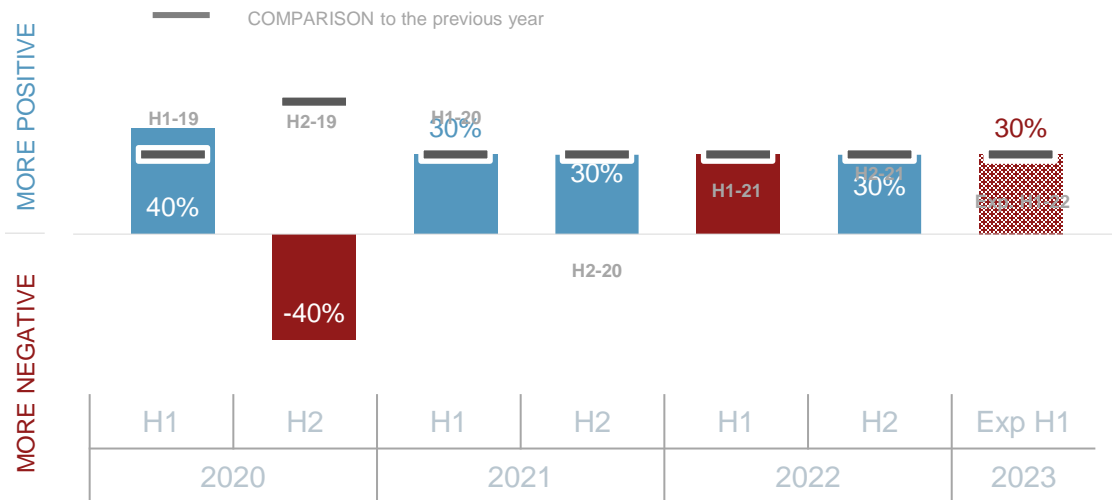
Does your company develop and build projects themselves?



Belgian contractors are XX for 2023

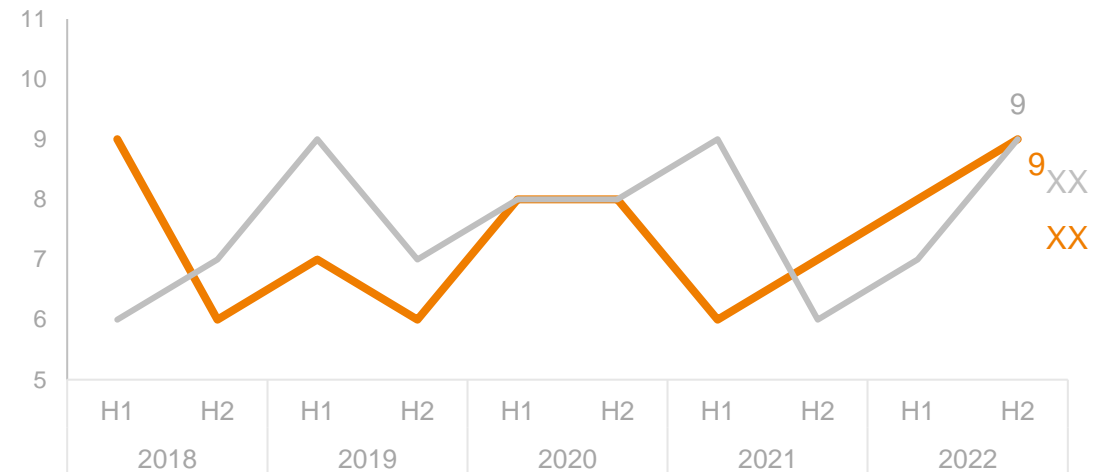
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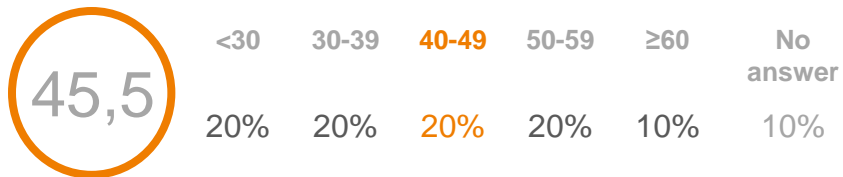
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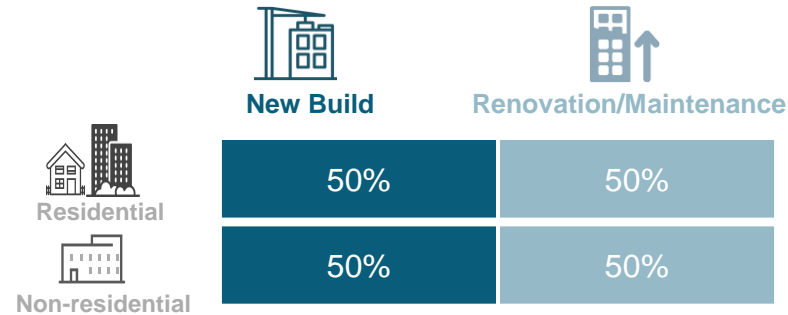
Average age



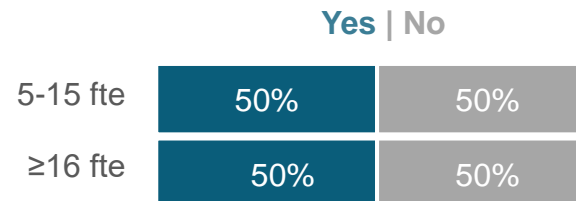
Base: n=XX

Project segmentation

What percentage of your residential/ non residential **turnover** do you get from **new build projects**?



Does your company develop and build projects themselves?

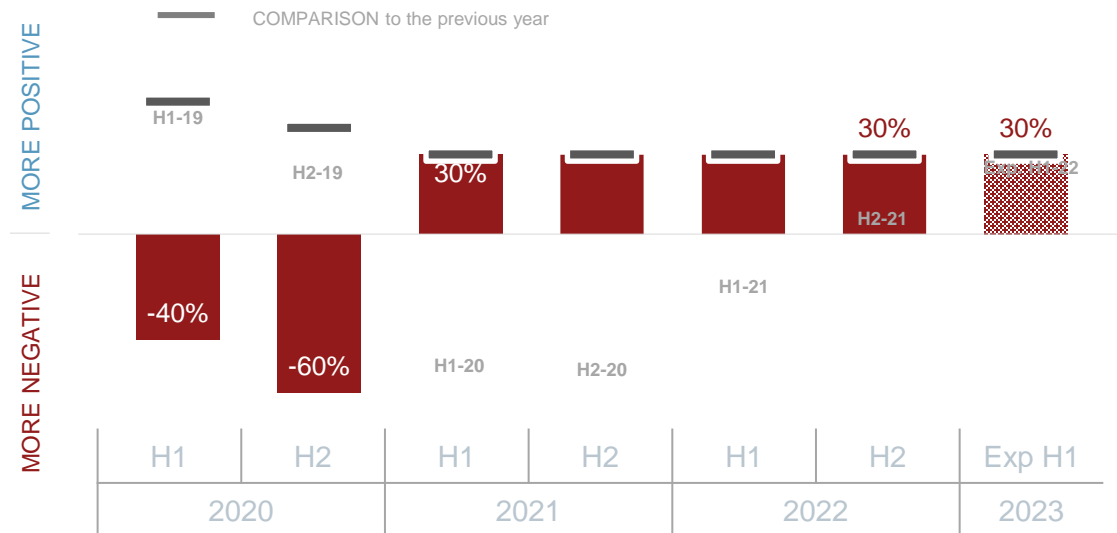


The majority of Polish contractors expect XX 2023

Net share of contractors' experience regarding turnover

If you compare your turnover of XX to XX, how did your turnover develop?
What are your **expectations** for the development in XX compared to XX?

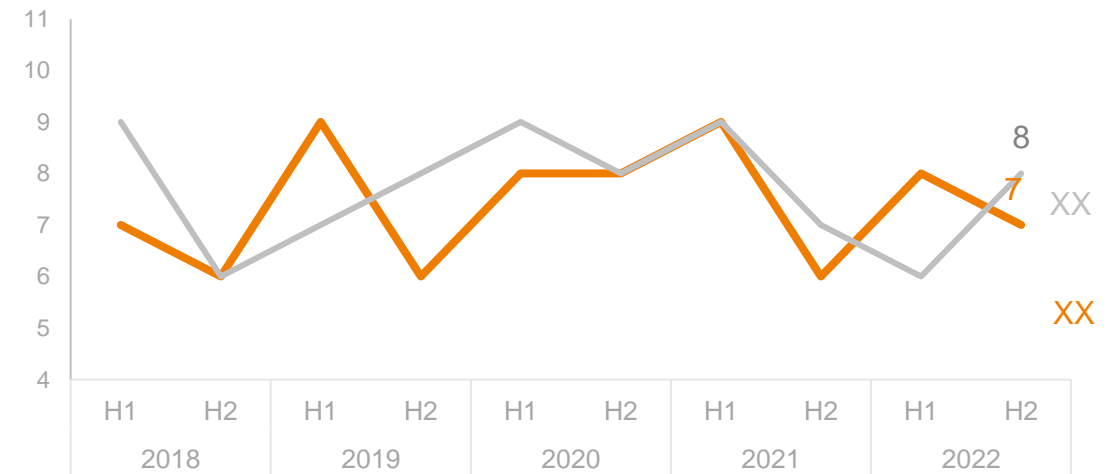
(Share of contractors reporting INCREASE minus the share of contractors reporting DECREASE in their turnover)



How big is your **current order book** portfolio?

For how many months will you be able to keep your current staff working?

ORDER BOOK
(MONTHS)



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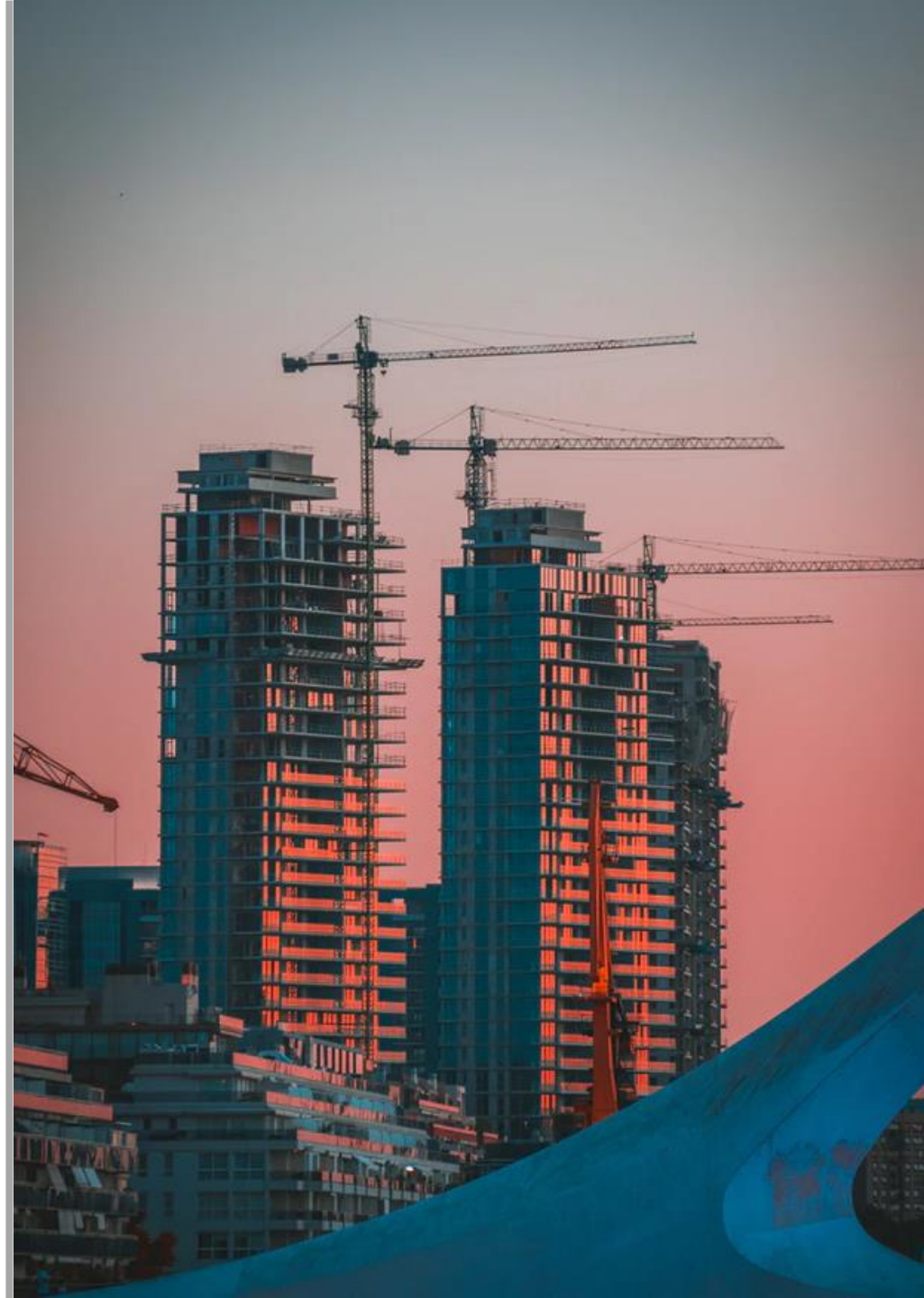
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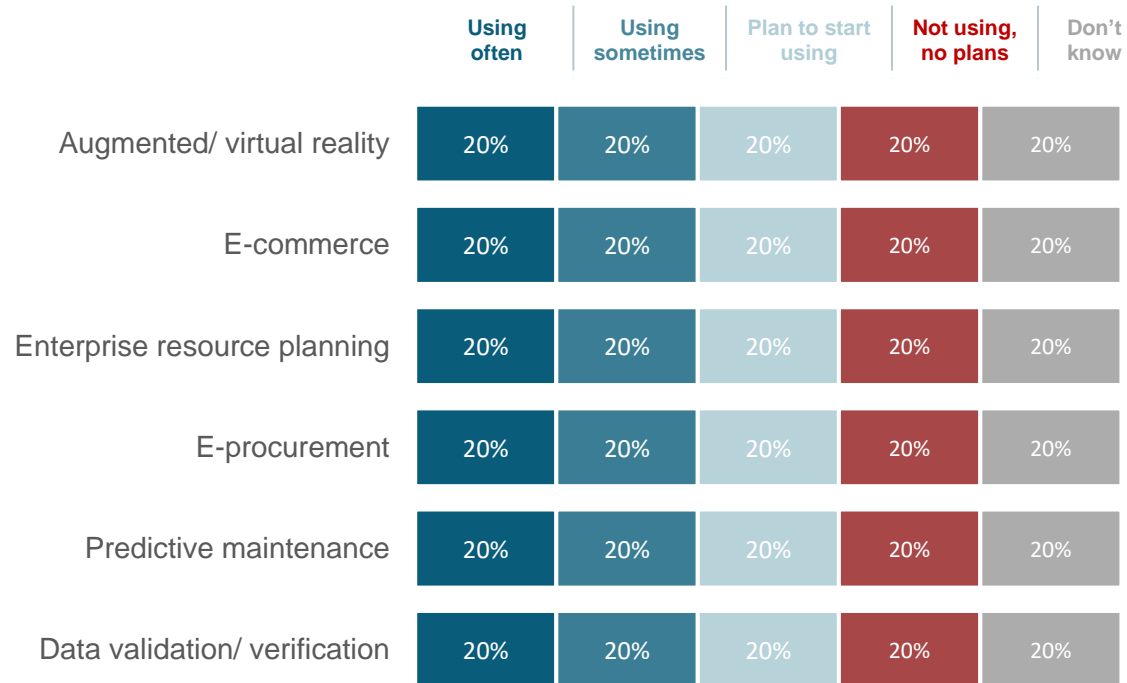
Appendix



Many different digital tools are XX

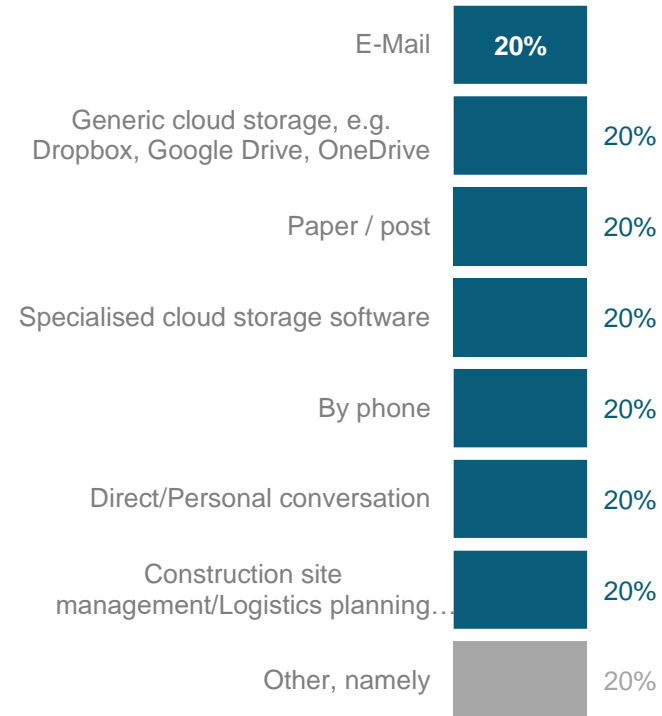
Using digital tools

How often do you use the following examples of digitalization?



Base: n=XX

Within a construction project how do you mainly exchange information with external stakeholders / target groups?



In general contractors are convinced that XX BIM is XX.

Opinions on digitalization and BIM

To what degree do you disagree or agree with the following statements?

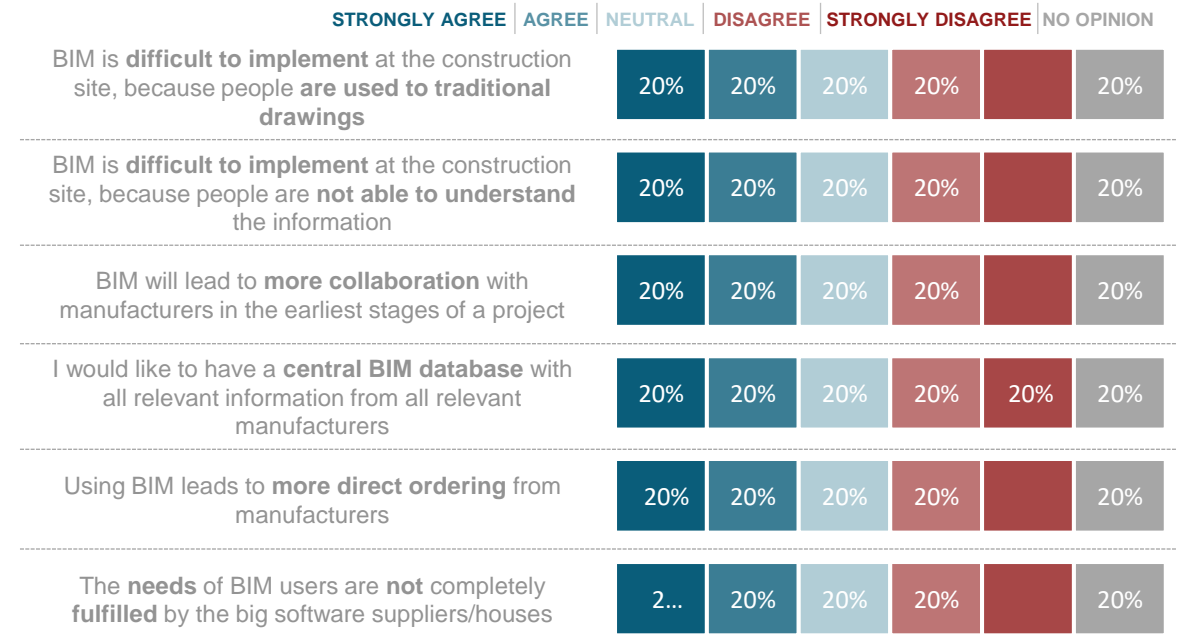
ALL CONTRACTORS

N=XX



BIM-USER AND BIM-AWARE CONTRACTORS

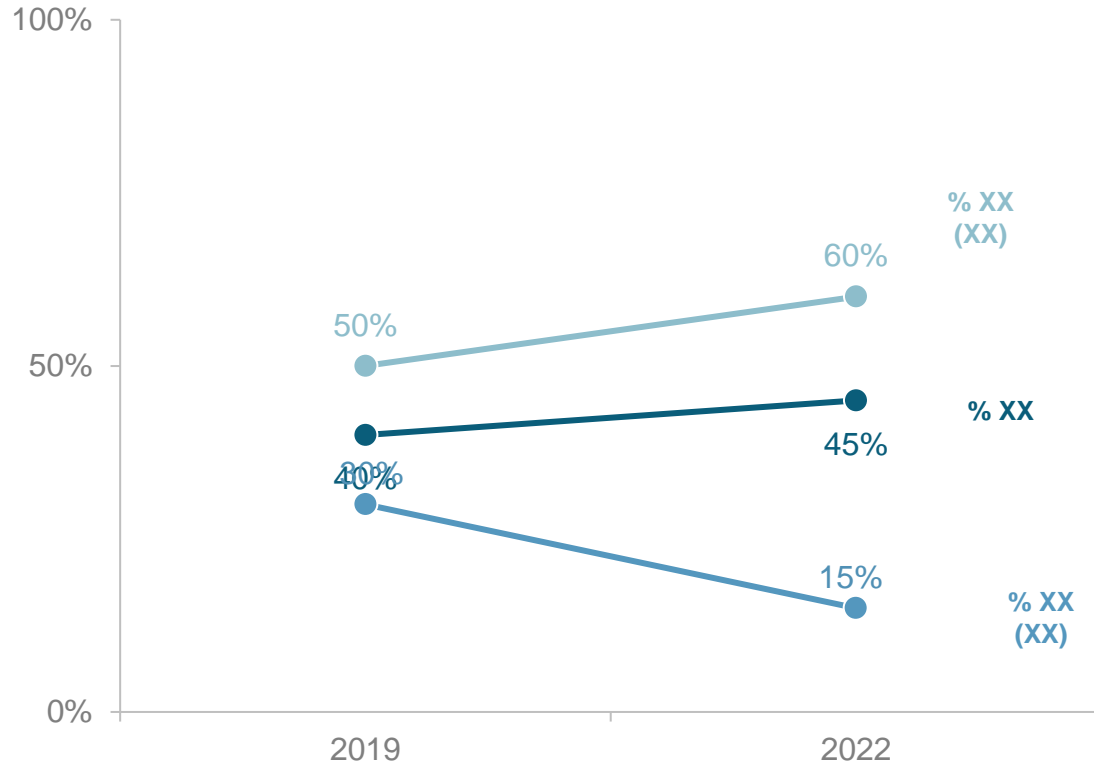
N=XX



The BIM usage has XX. Maturity in BIM usage also leads XX.

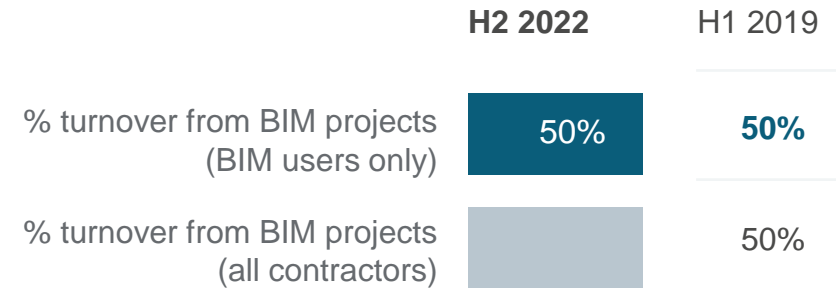
Familiarity with BIM

Are you familiar with BIM?
What is the share of BIM users?



Usage and turnover development in BIM projects

What is the share of projects in which BIM is used?
What percentage of the turnover/ revenue comes from BIM projects?



Base: n=XX (2022); XX (2019)

Key reasons not to use BIM is XX.

BIM USERS

2022 (N=XX) | 2019 (N=XX)

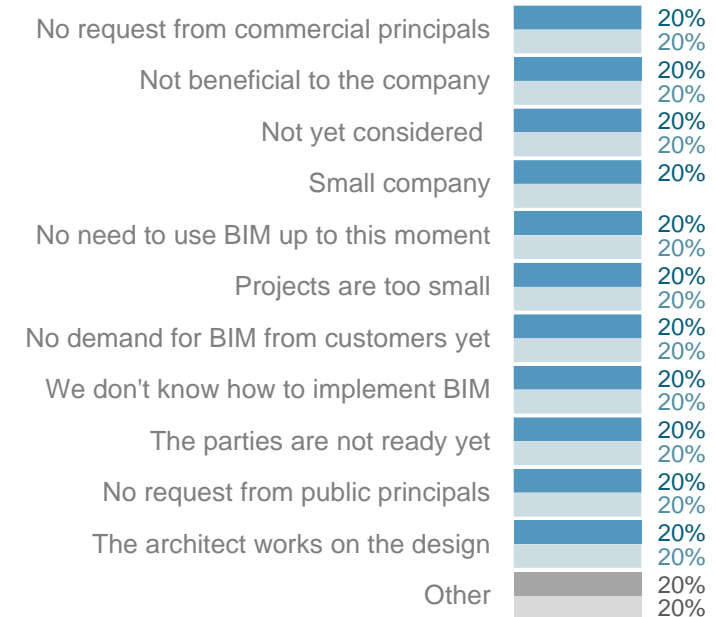
Why did your organization start using BIM?



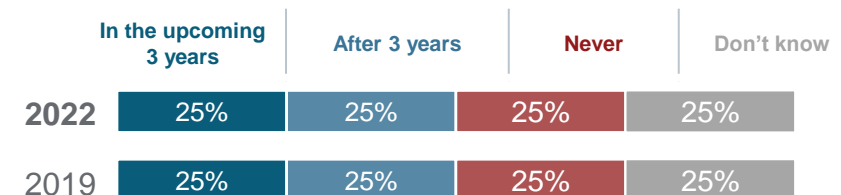
BIM AWARE

2022 (N=XX) | 2019 (N=XX)

Why has your organisation **not** yet started using BIM?*



When will your company **start** using BIM?

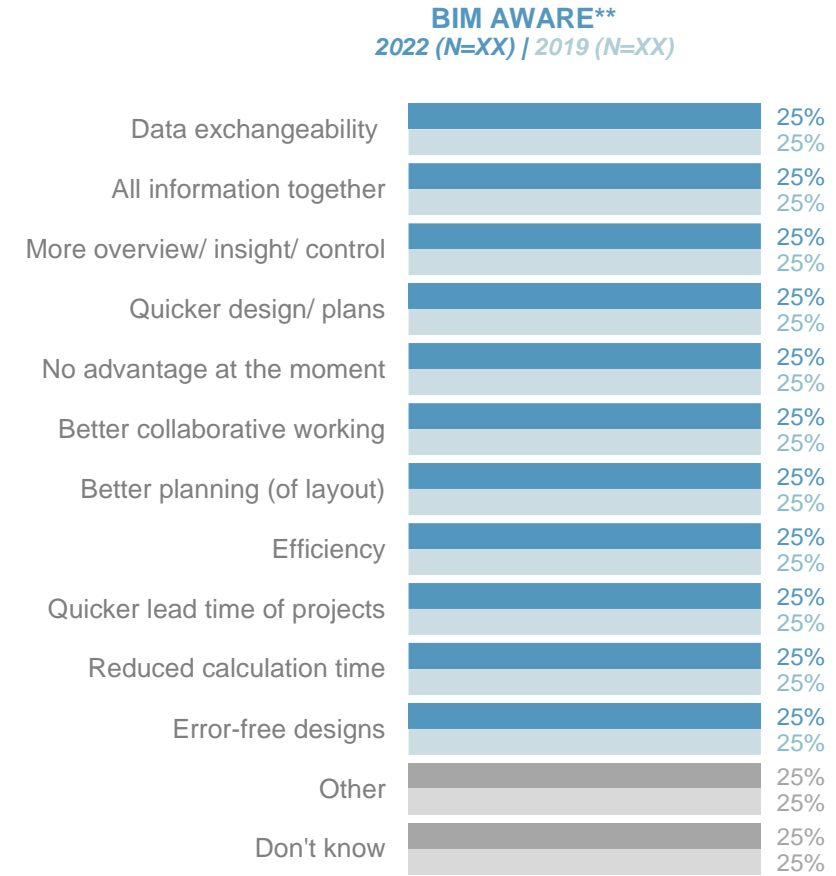
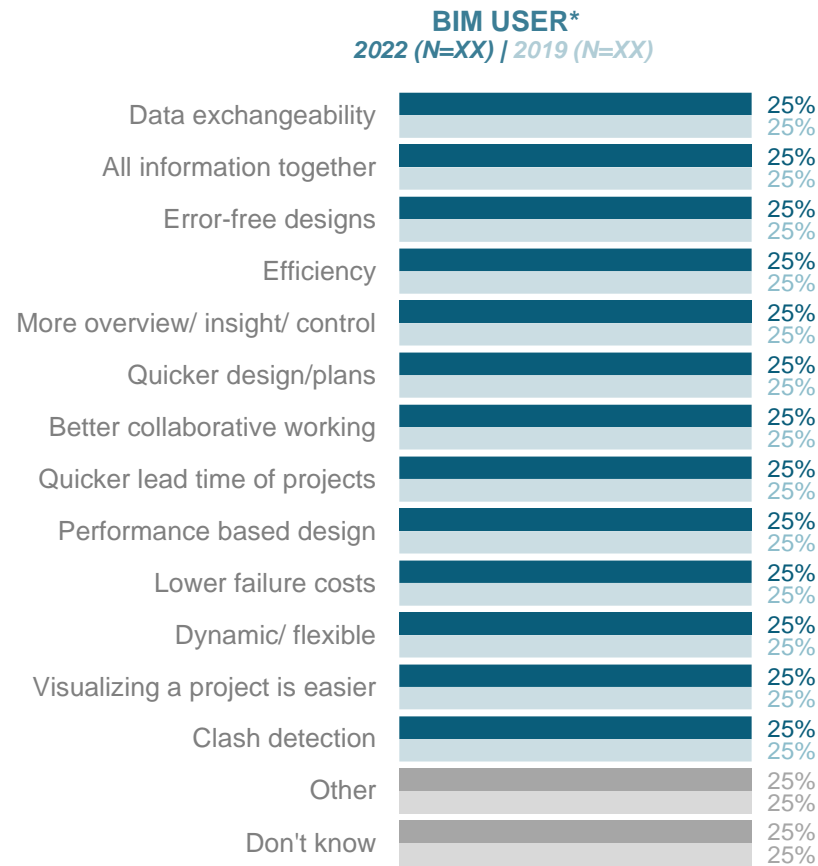


*Only the categories rated above XX% in 2022 are included in the graph.

**Some categories were not present in the 2019 survey.

Users and non-users of BIM are XX.

What do you consider to be the **XX** of BIM?



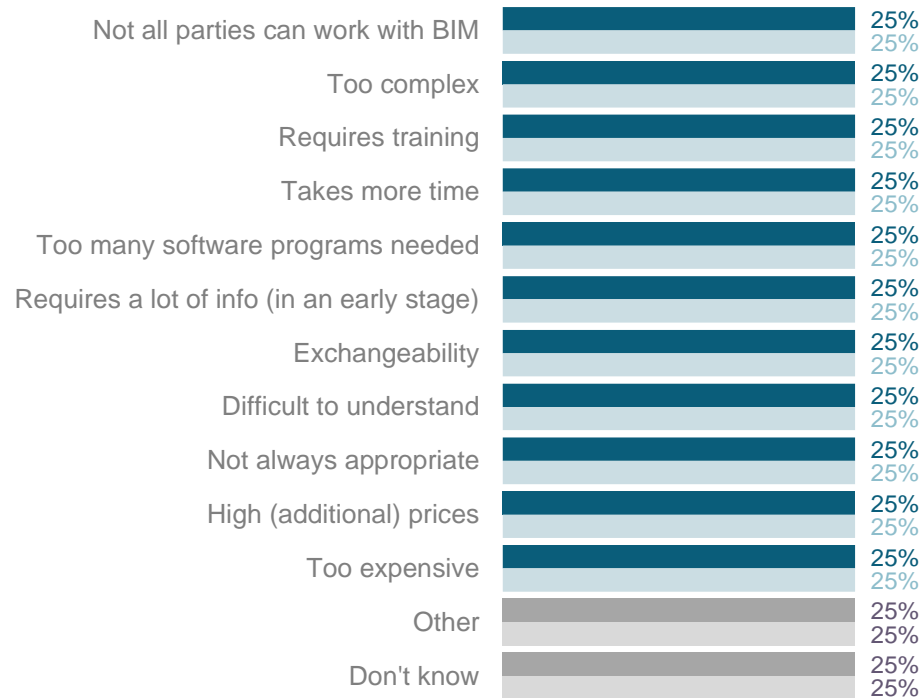
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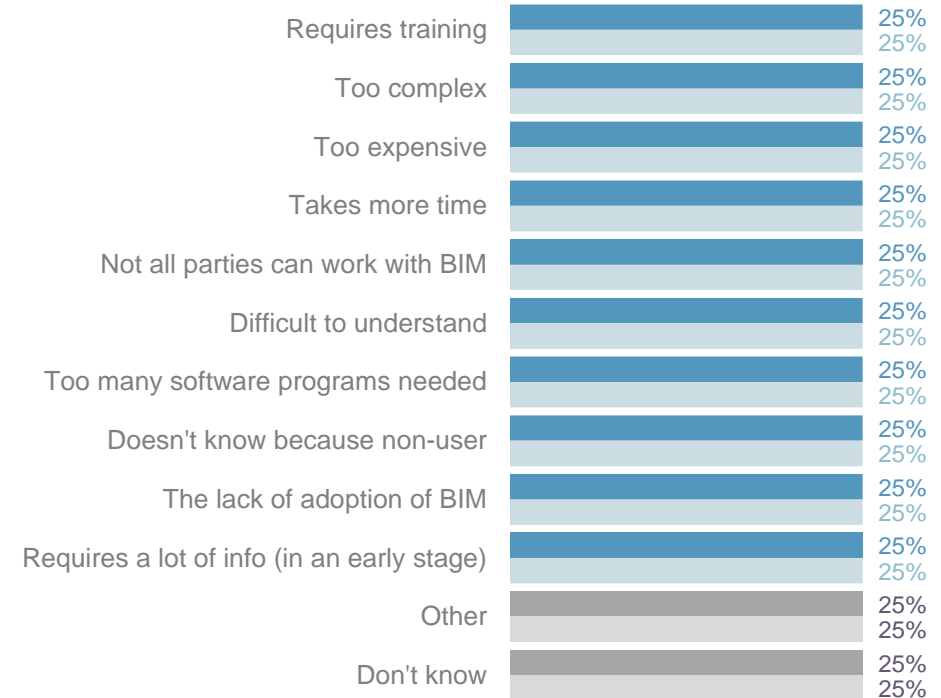
Complexity and investment costs are seen as important limitations.

What do you consider to be the **XX** of BIM?

BIM USER*
2022 (N=XX) | 2019 (N=XX)



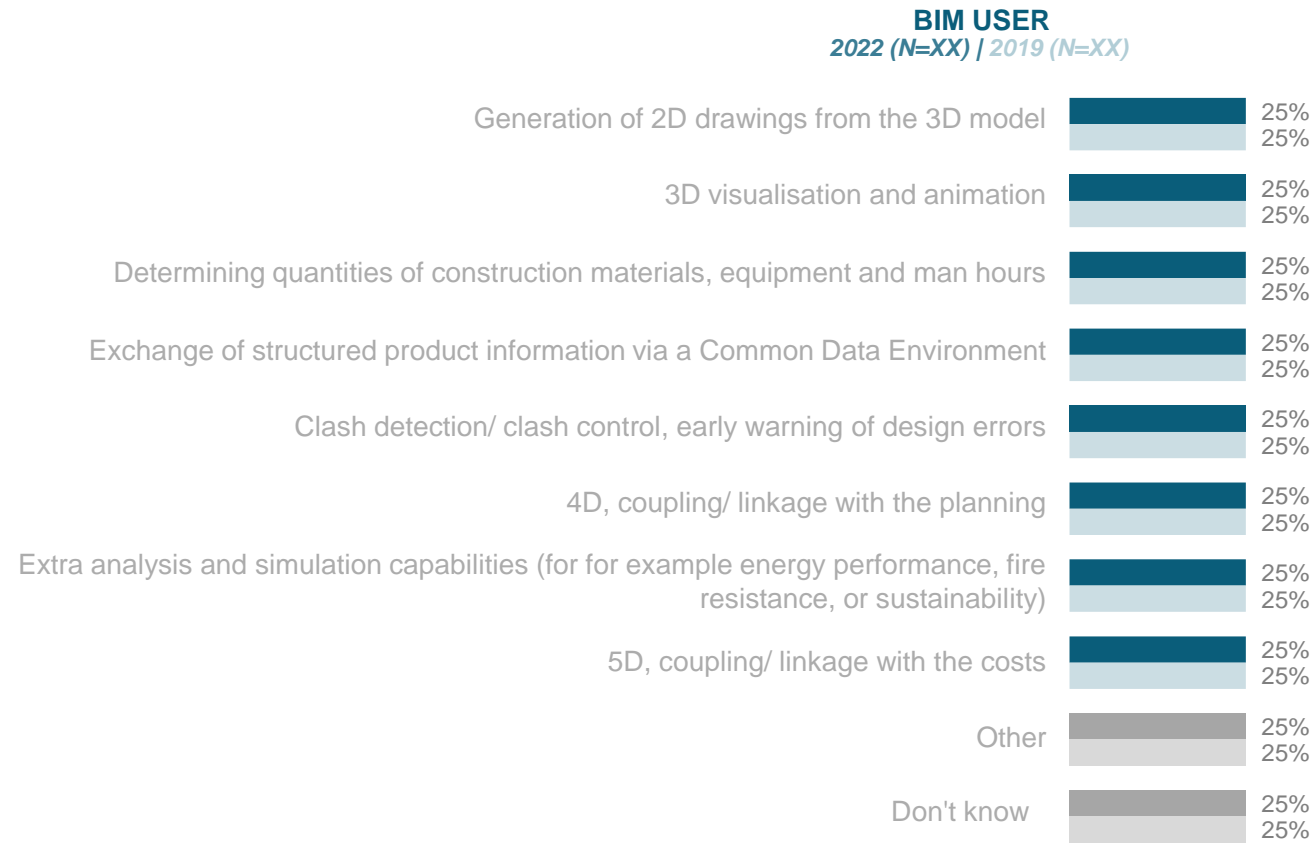
BIM AWARE**
2022 (N=XX) | 2019 (N=XX)



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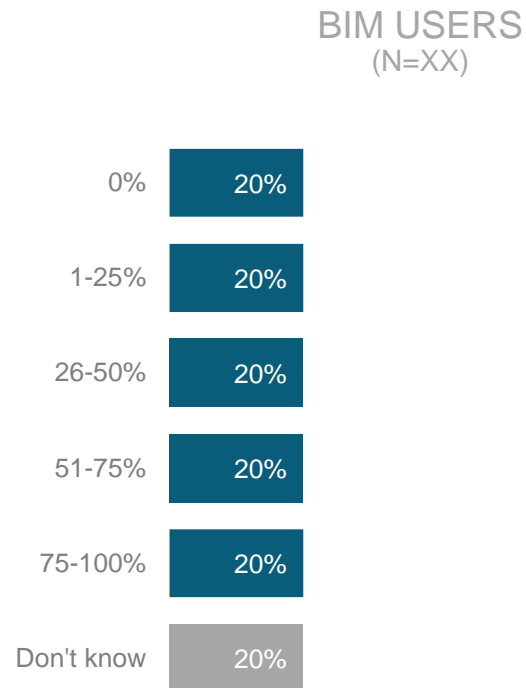
Generating drawings and XX

Which of the following XX of BIM do you use?

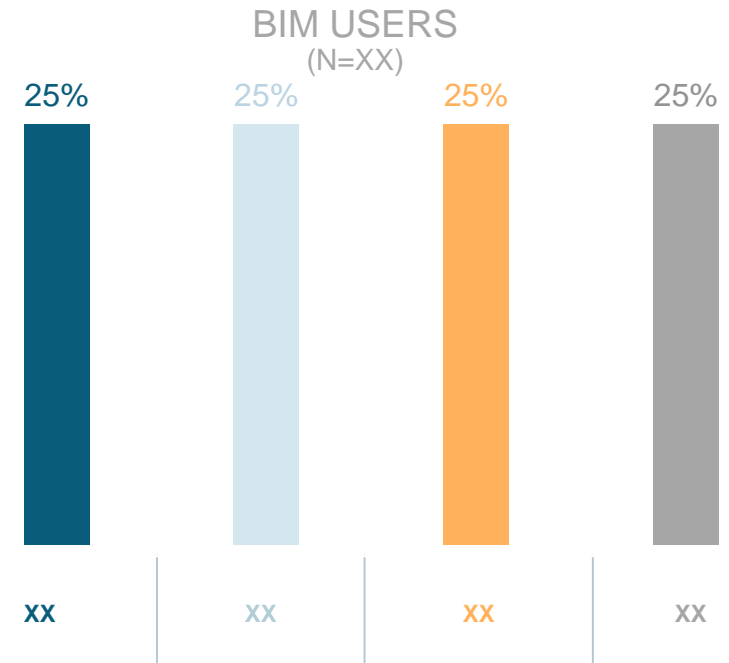


BIM models are XX

In what % of your projects you are **XX a BIM model**, as an addition to traditional tender calculation documentation?

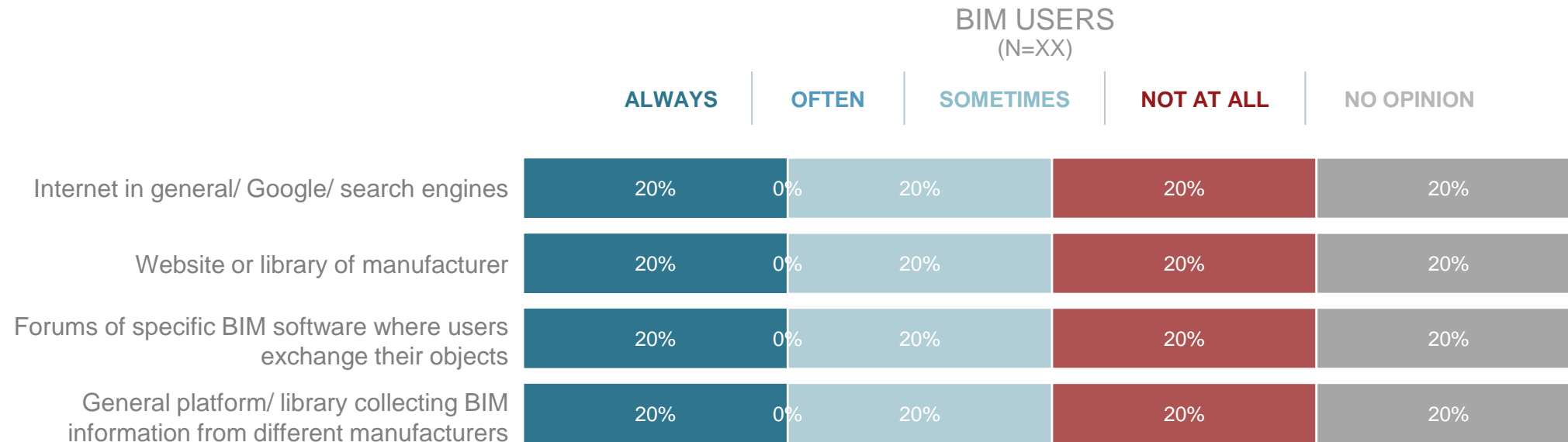


Do you work more with **XX** or with **XX**?



Usually contractors start searching for BIM information in a general and broad sense

To what extent do you **XX BIM XX** of manufacturers?



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Cross-country comparison

Appendix

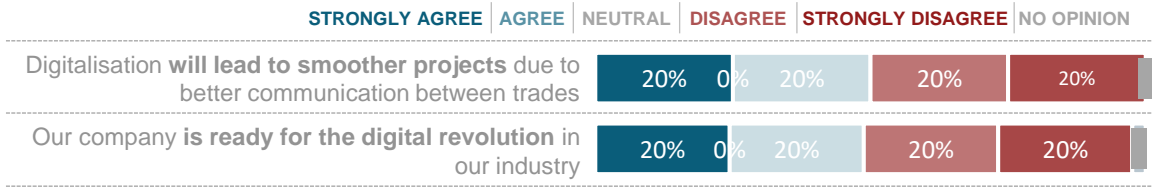


The contractors see that XX

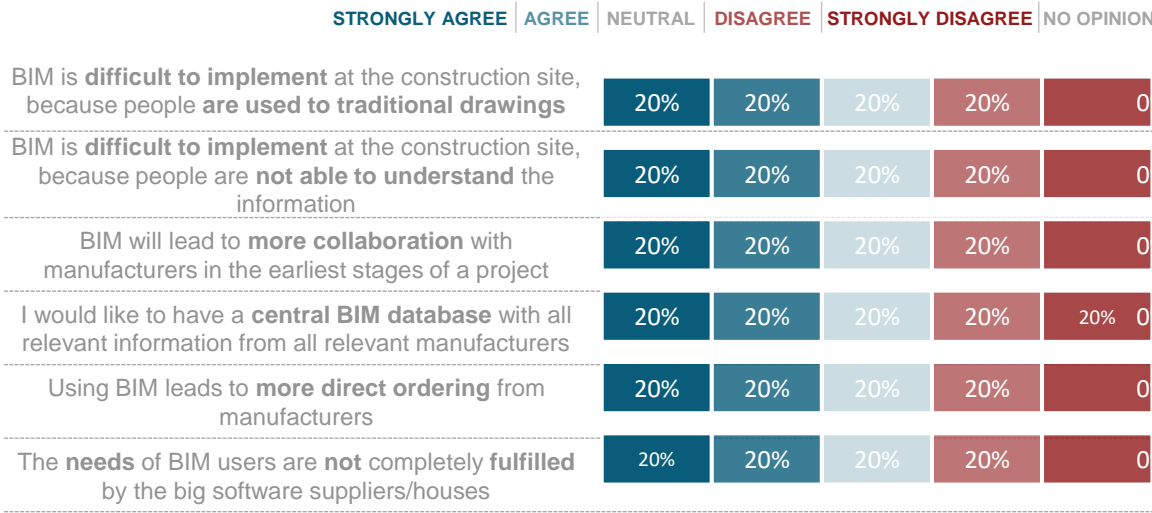
Opinions on digitalization and BIM

To what degree do you disagree or agree with the following statements?

ALL CONTRACTORS (N=950)



BIM-USER AND BIM-AWARE CONTRACTORS (N=435)



Cross-country comparison: (Strongly) agree

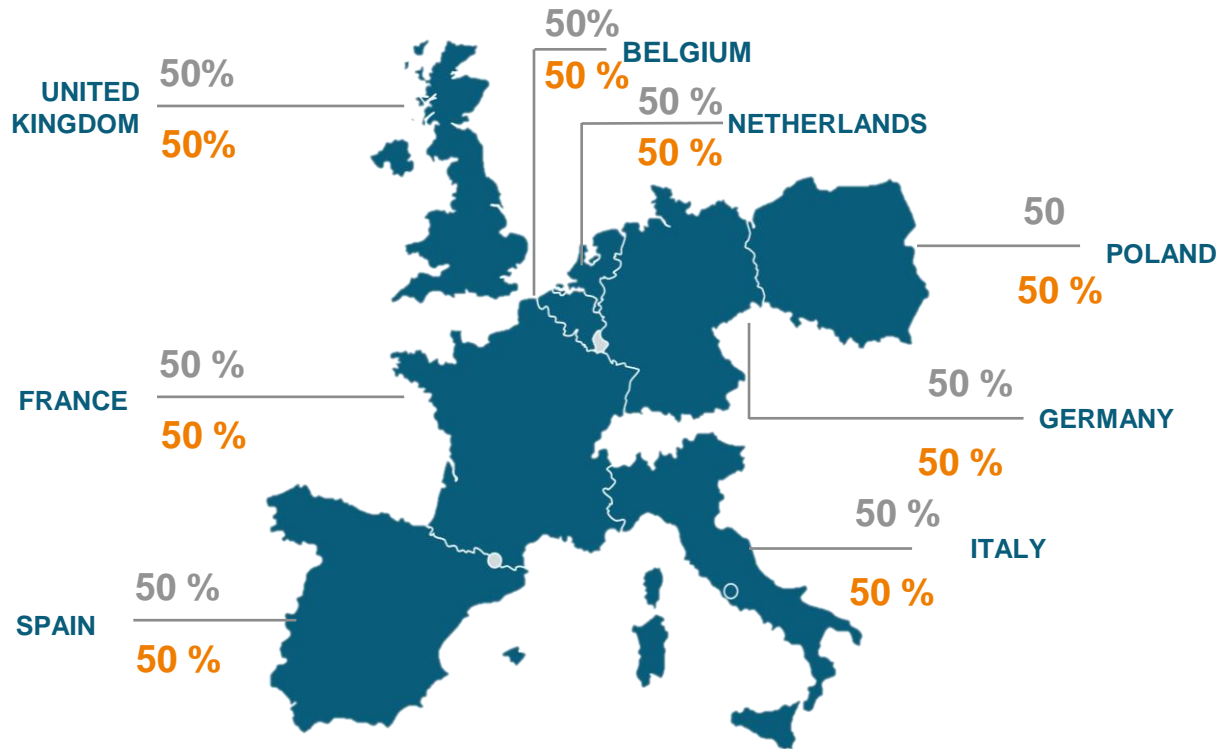
	United Kingdom	Germany	France	Spain	Italy	Netherlands	Belgium	Poland
Digitalisation will lead to smoother projects due to better communication between trades	20%	20%	20%	20%	20%	20%	20%	20%
Our company is ready for the digital revolution in our industry	20%	20%	20%	20%	20%	20%	20%	20%
BIM is difficult to implement at the construction site, because people are used to traditional drawings	20%	20%	20%	20%	20%	20%	20%	20%
BIM is difficult to implement at the construction site, because people are not able to understand the information	20%	20%	20%	20%	20%	20%	20%	20%
BIM will lead to more collaboration with manufacturers in the earliest stages of a project	20%	20%	20%	20%	20%	20%	20%	20%
I would like to have a central BIM database with all relevant information from all relevant manufacturers	20%	20%	20%	20%	20%	20%	20%	20%
Using BIM leads to more direct ordering from manufacturers	20%	20%	20%	20%	20%	20%	20%	20%
The needs of BIM users are not completely fulfilled by the big software suppliers/houses	20%	20%	20%	20%	20%	20%	20%	20%

The leaders in the use of BIM are the Netherlands, Belgium and Poland. A growth is expected in the coming years. In many countries approx. a third of contractors expect to start using BIM in their projects.

BIM penetration in Europe

% XX

% XX



A potential jump in BIM usage

What is the share of BIM users?

When do you expect to start using BIM?

Country	Ranking of BIM Users 2022	Projection of BIM Users 2025	Projection of BIM Users after 2025
 United Kingdom	XX	XX	XX
 Germany	XX	XX	XX
 France	XX	XX	XX
 Spain	XX	XX	XX
 Italy	XX	XX	XX
 Netherlands	XX	XX	XX
 Belgium	XX	XX	XX
 Poland	XX	XX	XX

Base: n=XX; United Kingdom n=XX ; Germany n=XX; France n=XX; Spain n=XX; Italy n=XX; Netherlands n=XX; Belgium n=XX; Poland n=XX

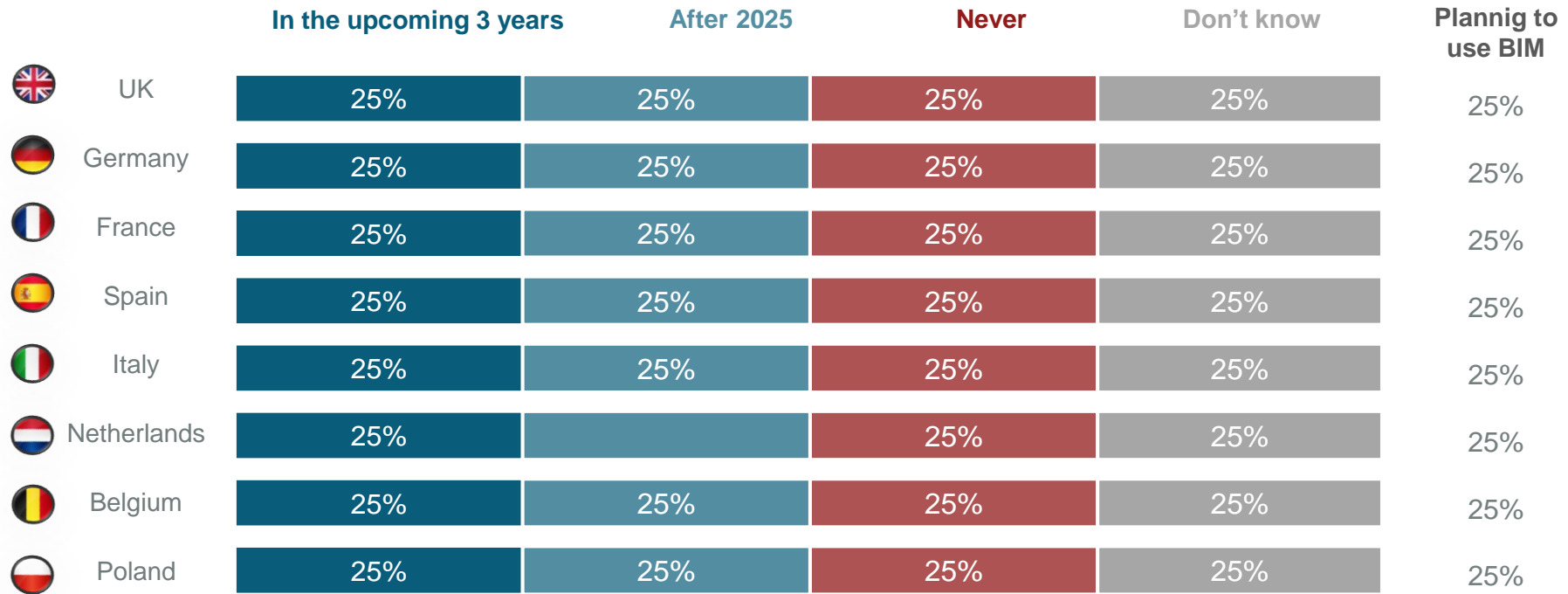
If BIM is used by XX

Country	% of total projects BIM is used (BIM users only)	% of total projects BIM is used (all contractors)	% turnover from BIM projects (BIM users only)	% turnover from BIM projects (all contractors)
 United Kingdom	XX	XX	XX	XX
 Germany	XX	XX	XX	XX
 France	XX	XX	XX	XX
 Spain	XX	XX	XX	XX
 Italy	XX	XX	XX	XX
 Netherlands	XX	XX	XX	XX
 Belgium	XX	XX	XX	XX
 Poland	XX	XX	XX	XX

There is a large share of contractors in all countries that XX

Future of BIM usage

XX BIM?






















**The question is asked only to respondents who are not already using BIM, but are familiar with it

Base: n=XX; United Kingdom n=XX ; Germany n=XX; France n=XX; Spain n=XX; Italy n=XX; Netherlands n=XX; Belgium n=XX; Poland n=XX


















The BIM usage has XX.

On using BIM XX BIM?

		 United Kingdom	 Germany	 France	 Spain	 Italy	 Netherlands	 Belgium	 Poland
Optimize own business process	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Forced by the market /other parties	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Principal demand (public)	 20%	20%	20%	20%	20%	20%	20%	20%	20%
To reduce failure costs	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Future expectations	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Optimize internal organization	 20%	20%	20%	20%	20%	20%	20%	20%	20%
A client demanded it	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Principal demand (e.g. developers)	 20%	20%	20%	20%	20%	20%	20%	20%	20%
To be distinctive	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Government regulation	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	 20%	20%	20%	20%	20%	20%	20%	20%	20%

Contractors do XX

XX BIM
XX *BIM?*

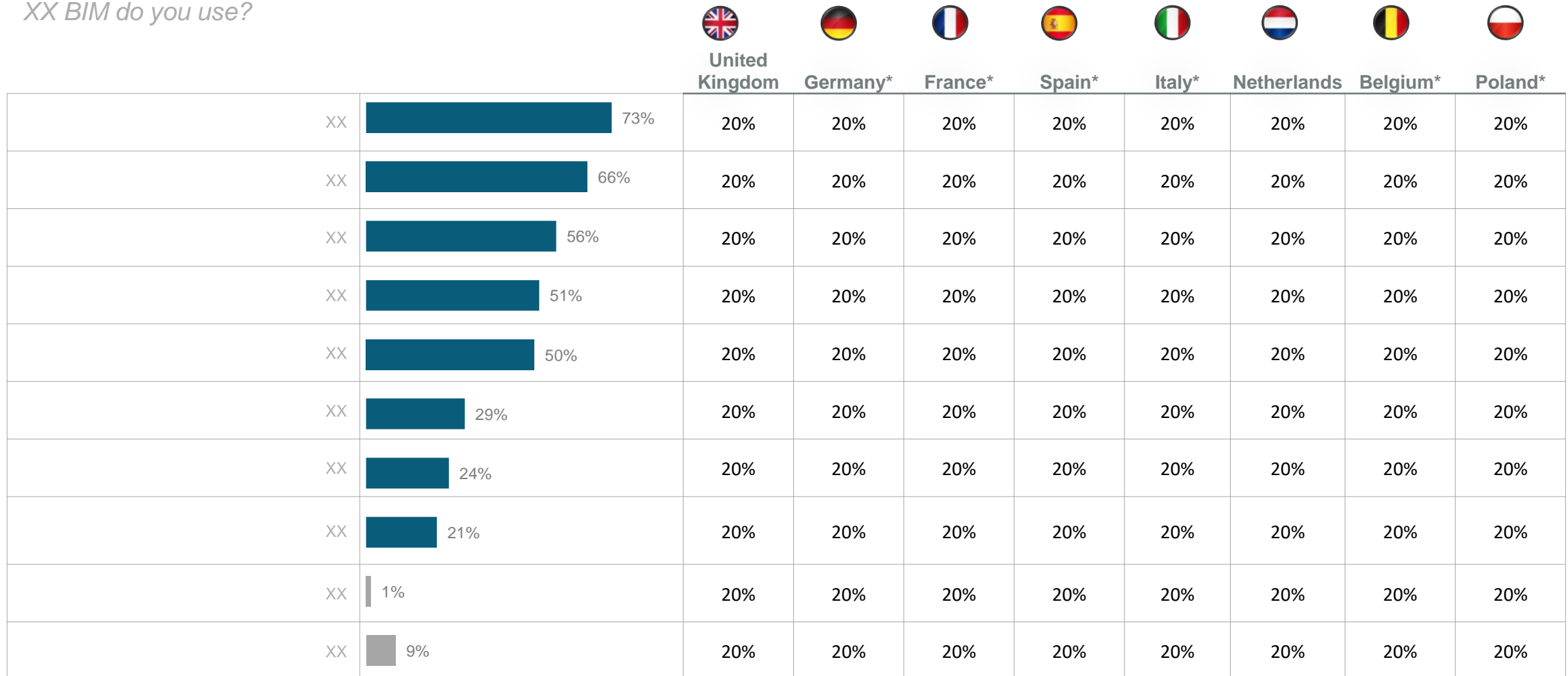
		 United Kingdom	 Germany	 France	 Spain	 Italy	 Netherlands	 Belgium	 Poland
No request from commercial principals	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Not beneficial to the company	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Not yet considered	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Small company	 20%	20%	20%	20%	20%	20%	20%	20%	20%
No need to use BIM up to this moment	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Projects are too small	 20%	20%	20%	20%	20%	20%	20%	20%	20%
No demand for BIM from customers yet	 20%	20%	20%	20%	20%	20%	20%	20%	20%
We don't know how to implement BIM	 20%	20%	20%	20%	20%	20%	20%	20%	20%
Other	 20%	20%	20%	20%	20%	20%	20%	20%	20%

*Only the categories rated above XX% are included in the graph

Base: n=XX; United Kingdom n=XX; Germany n=XX; France n=XX; Spain n=XX; Italy n=XX; Netherlands n=XX; Belgium n=XX; Poland n=XX

Generating drawings and XX

XX BIM do you use?

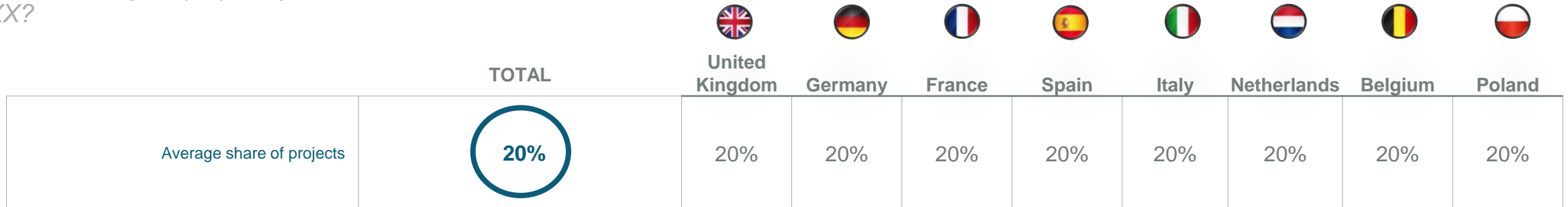


* Relatively low number of observations

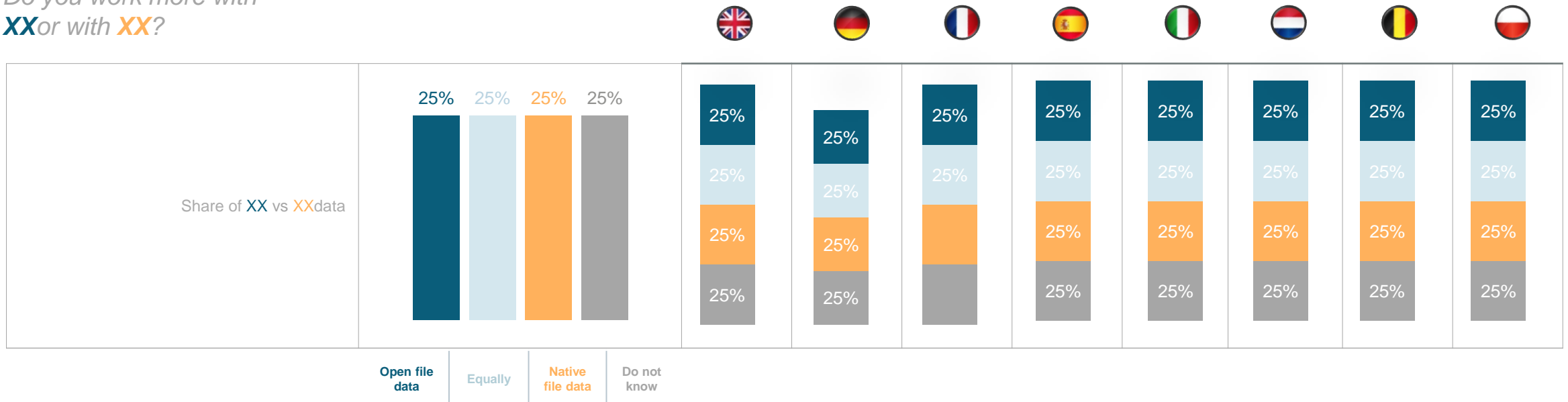
Base: n=XX; United Kingdom n=XX ; Germany n=XX; France n=XX; Spain n= XX; Italy n=XX; Netherlands n=XX; Belgium n=XX; Poland n=X

Overview of BIM models and the file data used

In what % of your projects you are **XX BIM model**, **XX**?



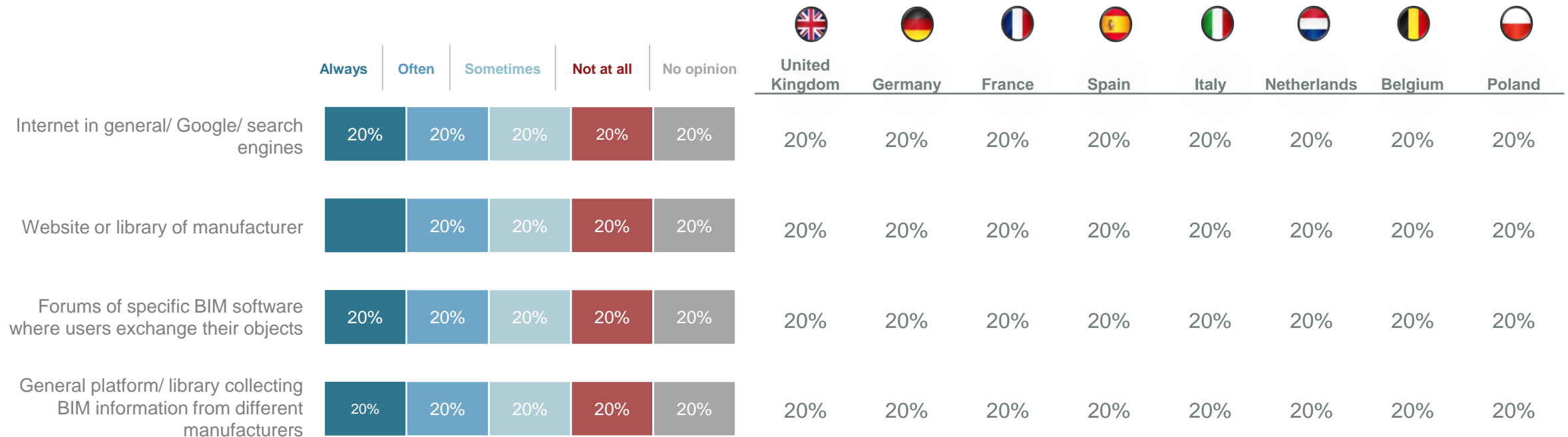
Do you work more with **XX** or with **XX**?



BIM XX

XX **BIM information/objects** of XX?

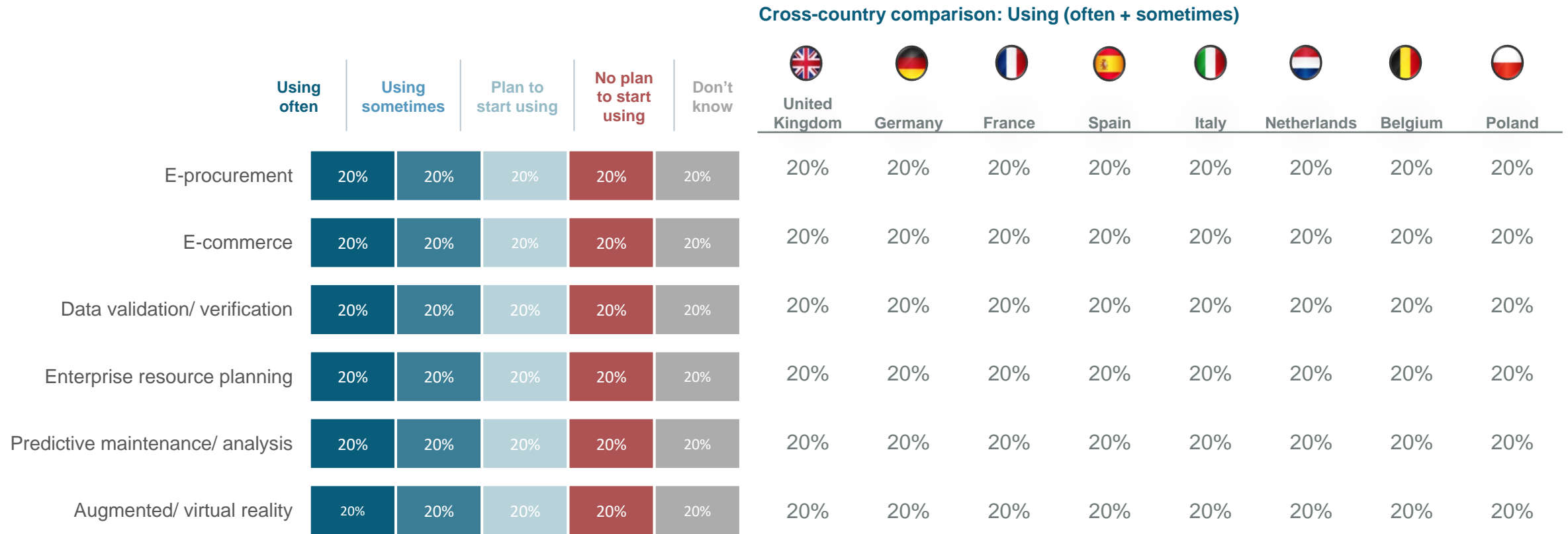
Cross-country comparison: Using (always + often)



Usually contractors start XX

Using digital tools

How often do you use the XX?



Base: n=XX; United Kingdom n=XX ; Germany n=XX; France n=XX; Spain n=XX; Italy n=XX; Netherlands n=XX; Belgium n=XX; Poland n=XX

USP Marketing Consultancy

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