SmartMarket Insight

Dodge Construction Network

Accelerating Digital Transformation Through BIM

Regional Focus:

Australia/New Zealand

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Introduction

Digital transformation is sweeping the globe, and the design and construction industry is no exception. Since 2009, Dodge Data & Analytics has been conducting quantitative research about the use and value of design and construction technologies. As adoption has steadily expanded over that time, so have users' capabilities, expectations and creativity at applying digital technologies in innovative ways to derive the most value from the underlying data being captured, created and shared across the project lifecycle.

Autodesk has partnered with Dodge on many of those efforts over the years and has now done so again for a major global *SmartMarket Report* titled *Accelerating Digital Transformation Through BIM*, which spans four continents and gathers the experiences of contractors, architects, civil engineers, and MEP and structural engineers who are currently using BIM to determine:

- Where they are in their process of digital transformation and how BIM is contributing value to that evolution.
- How they are deploying BIM and in what ways they are leveraging the data from models and processes to improve decision-making and effectively power integrated digital workflows among project team members.

About This SmartMarket Insight Report

As can be expected in any comprehensive global research, there are interesting variations in findings among the geographic areas studied. To help practitioners better understand the specific dynamics of how technology is being deployed in their region, Dodge and Autodesk have created a series of *SmartMarket Insight* reports specifically about each region's findings. This *SmartMarket Insight* report focuses on Australia/New Zealand and includes:

- A section showing key highlights of responses from BIM users in Australia/New Zealand.
- A section providing a summary of key findings from the full global study for context and reference.

Readers of this *SmartMarket Insight* are encouraged to also explore the full *Accelerating Digital Transformation Through BIM SmartMarket Report* to gain a complete understanding of how BIM is driving digital transformation throughout the entire global design and construction industry, and learn from the case studies, interviews and articles that supplement the data findings in that report. The report also explores the growing use of emerging digital technologies and practices in several categories, including design intelligence tools, innovative construction methods, jobsite technologies and smart building technologies.

Digital Transformation Trends in the Findings

Several key themes emerge from the global survey.

- A company's BIM intensity (i.e., the percentage of their projects where they use BIM) correlates directly to the progress of their digital transformation, the degree to which they report enjoying benefits from BIM and the ROI (return on investment) they believe their company is receiving on its investments in BIM.
- An even more pronounced correlation appears related to active use of BIM data for analysis and digital workflows. Companies conducting a higher number of the 22 data-related activities studied often report even greater positive experiences from BIM than those doing most of their work in BIM. And of course, the combination is a powerful and reliable formula for success.
- All respondents were asked to evaluate where they believe their company is on its journey of digital transformation. While the report shows that there are some variations in the responses between company-types and regions studied, there are more commonalities than differences as the entire industry moves toward a more efficient, connected and productive digital future.

Dodge thanks Autodesk for its ongoing support of important research on the digital transformation of the global design and construction industry.

Stephen A. Jones
Senior Director
Industry Insights Research
Dodge Data & Analytics

Stephen A. Jones leads DD&A's Industry Insights Research division. He is active in numerous industry organizations and frequently speaks at industry events around the world. Before DD&A, Jones was vice president with Primavera Systems (now part of Oracle), a global leader in project management software. Prior to that, he was principal and a Board of Directors member with Burt Hill, a major A/E firm (now merged with Stantec).

Donna Laquidara-Carr, Ph.D., LEED AP
Industry Insights
Research Director
Dodge Data & Analytics

Donna Laquidara-Carr currently provides editorial direction, analysis and content to DD&A's *SmartMarket Reports*. Prior to this position, she worked for nearly 20 years with DD&A's Dodge division, where she gained detailed insight into the construction industry.

Data: Australia/New Zealand

Introduction

The 85 respondents from Australia and New Zealand represent 10% of the total number of participants in the study. Nearly all, 81 respondents, identify themselves as BIM users, and they account for 13% of total BIM users in the study. Over two thirds (69%) of the BIM users from Australia/New Zealand are designers (architects, engineers and consultants), while about one third (31%) are contractors. This report highlights the responses from these respondents to better understand BIM use and value in Australia/New Zealand.

Use of BIM

As the chart at upper right shows, the current intensity of engagement with BIM in Australia/New Zealand is slightly below the global average, with 46% of the respondents reporting that they use BIM on 50% or more of their projects. The average share of projects on which BIM is used by the respondents from Australia/New Zealand is 50%, close to the global average of 52%.

Expectations about the intensity of their future use of BIM, though, is very high with the share of those expecting to use it on 50% of their projects doubling from the current level. This far exceeds the expected growth globally, and it demonstrates a high degree of commitment to BIM among users in Australia/New Zealand that shows the value they derive from its use.

Collaboration With BIM

As many previous Dodge Data & Analytics studies have demonstrated, use of BIM yields the greatest benefits when many players across the project team are engaged with it and use it to collaborate. Therefore, the study examines the degree to which data is shared and the expectations for its use across the project team.

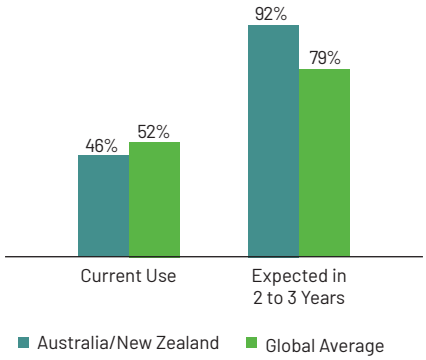
USE OF A COMMON DATA ENVIRONMENT

Respondents in Australia/New Zealand were asked about whether they use a common data environment (CDE) to exchange data with the project team, and those who do so were asked to rate the value of its use on a five-point scale, from no value to very high value. Their responses are compared with the global averages in the chart at lower right.

- Nearly all (89%) of the Australia/New Zealand respondents say that they use a CDE, and that share far exceeds the global average.
- They are also very enthusiastic about the value it provides, with nearly three quarters of those using a CDE (74%) stating that they find its use to provide high/very high value to them.

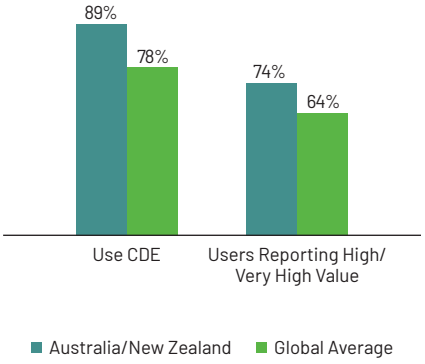
Use of BIM on 50% or More of Projects

Dodge Data & Analytics, 2021



Common Data Environment: Use and Value in Improving Performance of Project Team

Dodge Data & Analytics, 2021



Australia/New Zealand

EXPECTATIONS FOR BIM USE ACROSS THE PROJECT TEAM

To better understand their ability to collaborate through BIM across the project team, BIM users from Australia/New Zealand were asked about the level of skill with BIM they expect from other project team members. The chart at right compares their expectations with the ones reported from all survey respondents.

Expectations about the degree to which other project team members use BIM vary widely.

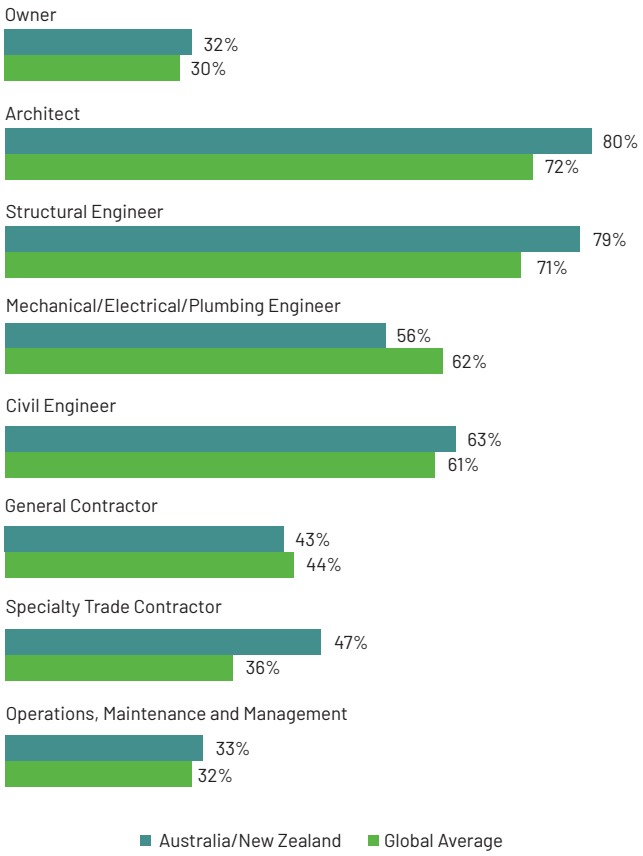
- The highest share, both in Australia/New Zealand and globally, expect architects and structural engineers to be proficient in BIM. In both cases, the percentage of those who expect this in Australia/New Zealand exceeds the global averages.
- Far fewer than the global average, though, expect MEP engineers to be proficient in BIM. Surprisingly, more of the Australia/New Zealand respondents expect civil engineers to have full use of BIM software than they do for MEP engineers, a finding that is not consistent with global estimation of BIM skills for these two types of organizations.
- Their expectations about designers, including architects, structural engineers, MEP engineers and civil engineers, are generally lower or on a par with the global averages.
- Their expectations for contractors also run contrary to the global pattern, with even more expecting BIM skills in specialty trade contractors (47%) than those expecting them in general contractors (43%). The global respondents have much lower expectations for specialty trade contractors.
- Respondents in Australia/New Zealand are quite consistent in their expectation of owners, and operations, maintenance and management, though, with the larger global findings, with about one third expecting each to have some BIM proficiency.

Respondents were also asked about their level of satisfaction with the BIM skills they encounter for each of the project team members.

- Respondents from Australia/New Zealand are most satisfied with the skills of architects (64%), structural engineers (62%) and general contractors (52%).
- About half report being satisfied with the skills of MEP and civil engineers and general contractors.
- However, the percentage of those satisfied with the skills of trade contractors (37%) is significantly lower, suggesting that their high expectations are not always met.

Share Expecting That Project Team Members Will Be Able to Fully Use BIM Software

Dodge Data & Analytics, 2021



Australia/New Zealand

Use of Data-Driven BIM Activities

In addition to being asked about their use of a BIM process, respondents were asked about their use of specific data-driven BIM activities. Twenty-two total activities were included in the survey, although respondents were only asked about those that they are likely to use.

CURRENT USE OF DATA-DRIVEN ACTIVITIES

The top activities utilized in Australia/New Zealand are shown in the chart at right, contrasted with the overall share globally who use them.

- While the share of projects on which BIM is used may be lower in Australia/New Zealand than it is globally, it is clear from the chart at right that BIM users in Australia/New Zealand are engaging in more activities with BIM than are most other users, demonstrating that they are highly engaged when they do use it on projects.
  - Use of the top five activities in Australia/New Zealand is reported by a share of users that is 15 percentage points greater or more than the overall global use.
  - Many of the top activities help improve the process of construction, including clash detection, construction process presentation and explanation of the construction process for owners and surrounding residents, constructability evaluation and safety analysis of the construction site.
  - Australia/New Zealand is the only region/country with more than one quarter who conduct safety analysis of the building itself.
  - Other data-driven activities used by fewer respondents from Australia/New Zealand, but which still exceed global use by a notable percentage, include preparation of building confirmation application documents (31% versus 20%), part interference checks (27% versus 17%), air conditioning and ventilation analysis (22% versus 14%), and enabling factory production and prefabrication (28% versus 15%).

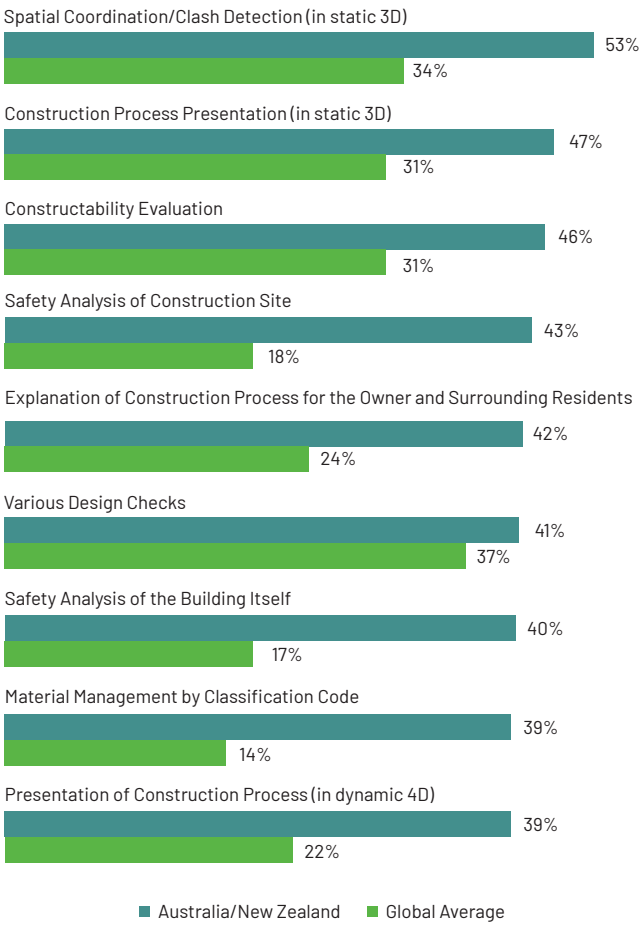
ANTICIPATED FUTURE USE OF DATA-DRIVEN ACTIVITIES

Respondents were also asked about the top activities that they want to use in the next two to three years. In Australia and New Zealand, the following items top this list, selected by 25% or more of those not currently using them:

- Energy analysis
- Air conditioning and ventilation analysis
- Various design checks
- Calculation required for sustainability
- Lighting analysis

Top Data-Driven BIM Activities in Australia/New Zealand

Dodge Data & Analytics, 2021



Australia/New Zealand

Top BIM Benefits

The study included a thorough look at the benefits that BIM users gain from its use. Each was asked to rate the degree to which they experienced potential benefits on a five-point scale, from none to very high.

- Designers (architects, engineers and consultants) were asked to rate 22 benefits in four categories—business, sustainability, risk reduction and operational efficiency.
- Contractors were asked to rate a different list of 22 benefits in five categories—business, quality, cost, schedule, and health and safety.

The most highly rated benefits among designers are shown in the chart at upper right. Since the number of contractors using BIM who responded to the survey in Australia/New Zealand did not exceed the minimum statistical threshold of 30, a table with their top benefits is shown at lower right, all of which were rated at a high/very high level by over half of these contractors.

BIM BENEFITS EXPERIENCED BY DESIGNERS

Sixty-three percent or more of designers experience 10 benefits at a high/very high level. This generally strong performance is likely due to their strong engagement with the various BIM-related data activities.

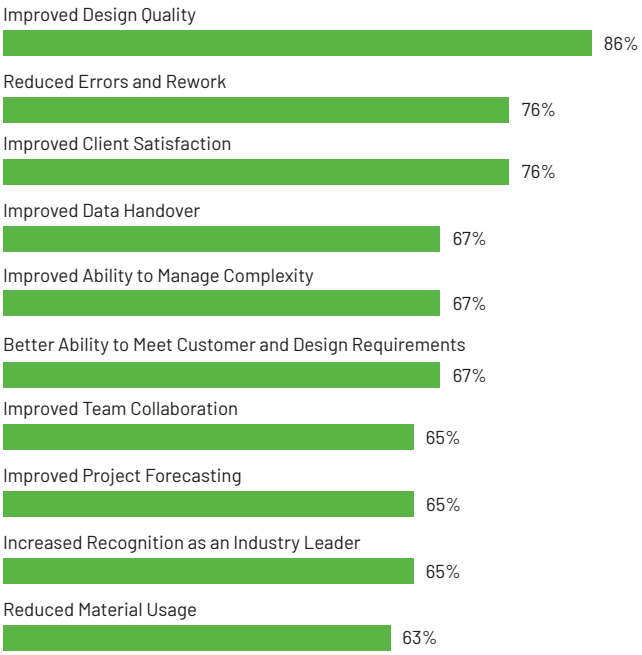
- By far the top benefit experienced by designers in Australia/New Zealand is improved design quality, and the share of designers rating it as experienced at a high/very high level significantly exceeds the global average.
- Another business benefit experienced by far more designers in Australia/New Zealand than globally is increased client satisfaction (76% versus 81%).
- Designers from Australia and New Zealand also believe that BIM helps them to reduce risk, with reduced errors and rework among their most frequently experienced benefit, and a high percentage also noting improved project forecasting, improved ability to manage complexity, better ability to meet customer and design requirements, and ensured business continuity (which isn't on the chart but was rated highly by 61% of respondents). In fact, the share of those from this region who rate reduced errors and rework strongly is the highest of all the regions included in the study.
- They also give strong scores to a few operational benefits, including improved team collaboration and improved data handover.

BIM BENEFITS EXPERIENCED BY CONTRACTORS

By far the top benefit experienced at a high/very high level by contractors in Australia/New Zealand is improved stakeholder

Top 10 BIM Benefits Experienced at a High/Very High Level by Designers in Australia/New Zealand

Dodge Data & Analytics, 2021



Top Benefits Rated High/Very High by Over Half of Contractors From Australia/New Zealand

Dodge Data & Analytics, 2021

Improved Stakeholder Engagement
Improved Handover Experience
Reduced Number of Constructability Issues Onsite
Reduced Rework During Construction
Reduced Defects at Handover
Increased Percentage of Successful Projects

Australia/New Zealand

engagement, which is rated highly by over three quarters. This suggests that BIM is helping them with effective communications and collaboration.

Nearly two thirds note that they have had the handover experience improved at a high/very high level as well, and over half note that they have reduced defects at handover.

The reduction of constructability issues onsite and reduced rework during construction are also critical benefits for contractors that help them improve productivity, maintain schedules and increase safety on their projects.

BIM Investments and ROI

INVESTMENTS IN BIM

The top BIM investment that those in Australia/New Zealand anticipate making in the next two years is developing collaborative BIM processes with external parties. A larger share of respondents from this region (54%) report that this will be a top investment than do those globally (41%).

Over 40% in Australia/New Zealand also anticipate investing in developing internal collaborative BIM procedures and BIM training. In contrast, only about one third plan to make software investments and one quarter will make investments in hardware.

PERCEIVED BIM ROI

Per the chart at upper right, the perception of the ROI on their BIM investments in Australia/New Zealand is far higher than the global average, although the share who formally measure that ROI is slightly lower.

Digital Transformation

BIM is a critical component of a company's process of digital transformation, but it is also one of many potential technologies and approaches emerging in the design and construction industry that promise to improve project and business outcomes.

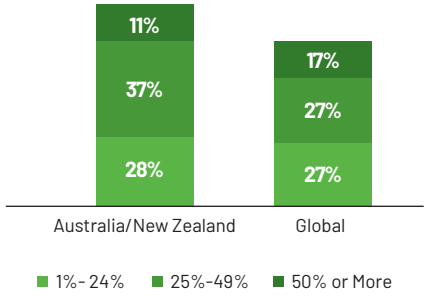
STAGE OF DIGITAL TRANSFORMATION

To better understand where the design and construction industry stands in terms of its process of digital transformation, respondents were asked to place themselves at one of five points along a spectrum, from haven't started yet to having achieved full digitalization. The chart at lower right shows the responses from those in Australia and New Zealand compared with those from the entire study. These responses include both those of BIM users and nonusers.

As the chart reveals, the findings are on a par with the global responses, with about one quarter still in the early stages, nearly half in the middle of their efforts and about one

BIM Users Experiencing Positive ROI From Their BIM Investments

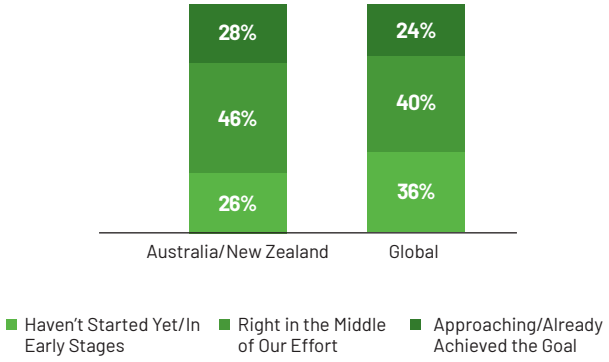
Dodge Data & Analytics, 2021



Share of Projects on Which BIM ROI Is Formally Measured
Australia/New Zealand: 33%
Global: 36%

Stage of Digital Transformation

Dodge Data & Analytics, 2021



Australia/New Zealand

quarter who are approaching or have already achieved the goal of digital transformation.

USE OF EMERGING TECHNOLOGIES/APPROACHES

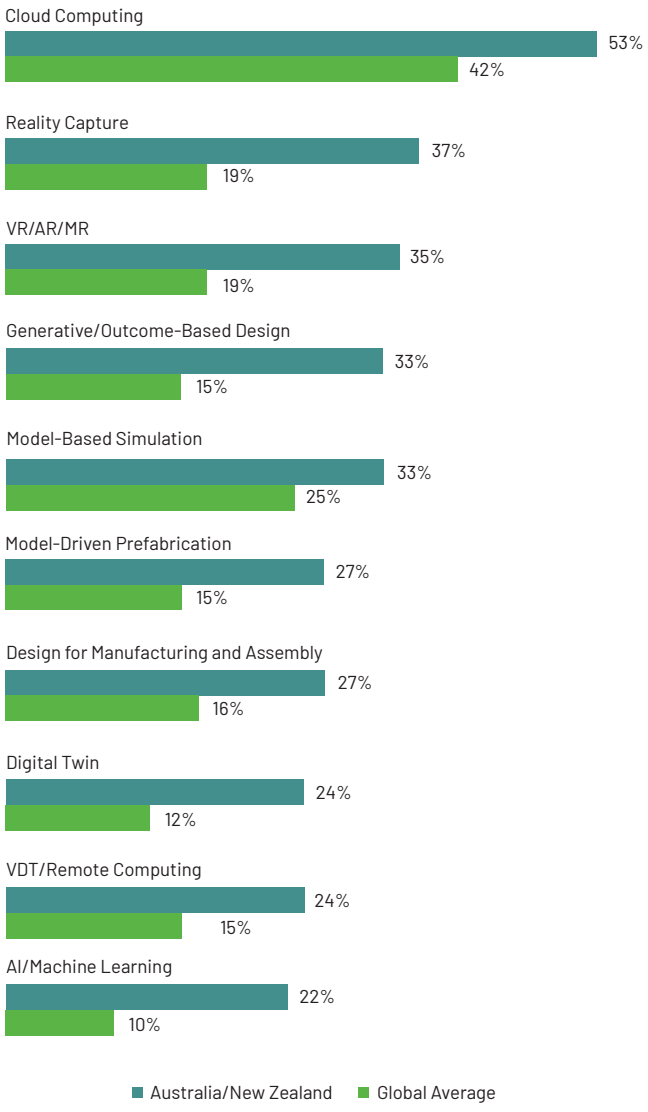
The study also included 17 emerging technologies/approaches associated with digital transformation and asked respondents to indicate which ones they are using now. The top 10 for Australia/New Zealand are shown in the chart at right, contrasted with the share reporting that they are using them globally.

- Use in Australia/New Zealand for each of these 10 exceeds the use reported globally, often by a relatively high share of responses. This suggests that the design and construction industries in this region may be farther along in their process of digital transformation compared with their global counterparts than their self-evaluation suggests.
- Particularly notable are the relatively high levels of use for reality capture, virtual/augmented/mixed reality (VR/AR/MR) and generative/outcome-based design.
- Respondents were also asked about the technologies/processes they intend to begin to use in the next two to three years. The top ones in this region are:
  - Model-Driven Prefabrication
  - Robotics/Automated Vehicles
  - Generative/Outcome-Based Design

Since generative/outcome-based design is already widely used here, this suggests that Australia/New Zealand is poised to be a global leader in the use of this technology.

Top Emerging Technologies/Approaches in Use in Australia/New Zealand

Dodge Data & Analytics, 2021



Data: Summary of Global Findings

Global Summary Introduction and BIM Usage/Skills

Introduction to Global Summary

The next four pages provide highlights of the findings of the full global study, titled *Accelerating Digital Transformation Through BIM SmartMarket Report*.

BIM Usage and Skills

The chart at bottom left shows how many BIM users, by company-type, currently use it on most of their projects compared with how many plan to be doing so within two to three years. Findings clearly forecast significant growth by all.

Engagement With BIM Data

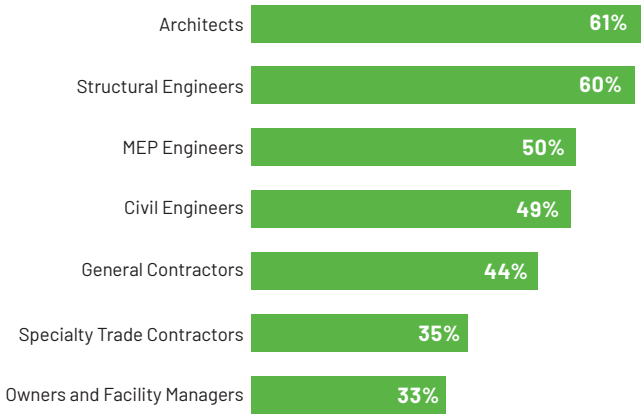
The research evaluated usage of 22 activities that leverage BIM data for improved decision-making and digital workflows. The chart at bottom right shows two levels of engagement with that full set of activities by company-type and size.

Satisfaction With BIM Skill Levels

The chart at right shows how many BIM users are currently satisfied with the level of BIM skills they encounter from each company-type shown. The findings point to a broad industry need to enhance BIM skills across the project team.

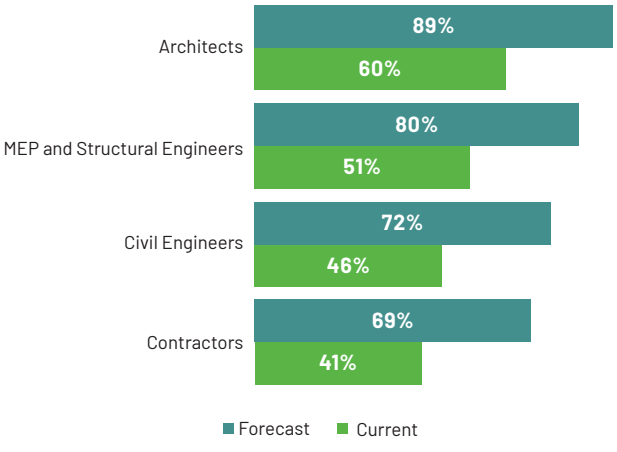
All BIM Users' Satisfaction With BIM Skills of Each Type of Project Team Member

Dodge Data & Analytics, 2021



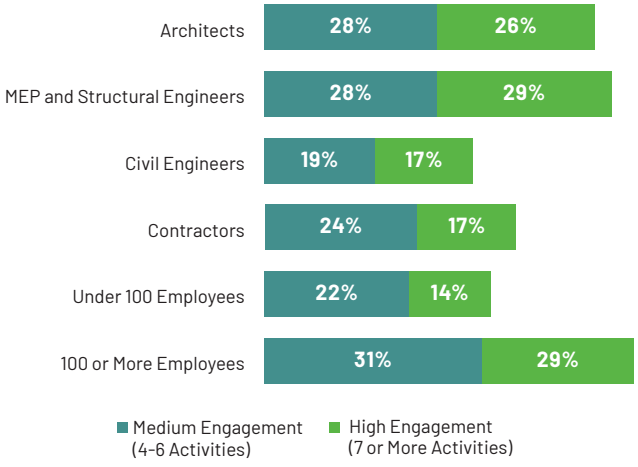
Current BIM Usage on 50% or More of Projects Compared With Forecast (2-3 Years)

Dodge Data & Analytics, 2021



Engagement With Data-Related Activities by Company-Type and Size

Dodge Data & Analytics, 2021



Summary of Global Findings

Use of a Common Data Environment and BIM Benefits

Common Data Environment

Nearly all BIM users use a common data environment to exchange data with their project teams, with contractors reporting the greatest value from its use.

Benefits of BIM

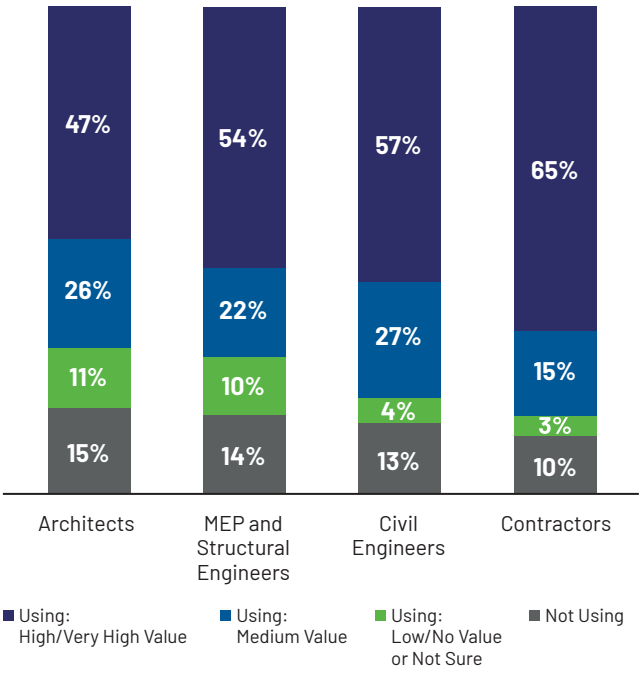
The survey examined BIM users' experience with 41 separate benefits received from their use of BIM.

The findings reveal a strong correlation between BIM intensity and the experience of BIM benefits. The charts at bottom show the top five benefits reported by designers (architects and engineers) and contactors, comparing the percentages doing 25% or less of their work with BIM to those doing more than 75%.

The compelling differences shown in these charts provide an explanation for the findings on the previous page about the dynamic pace at which current users are planning to increase their BIM intensity. More BIM means more benefits.

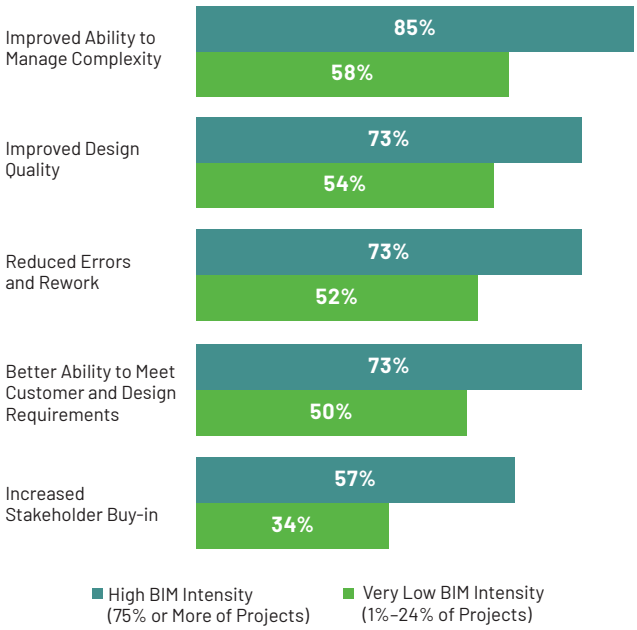
Use and Value of a Common Data Environment by Company-Type

Dodge Data & Analytics, 2021



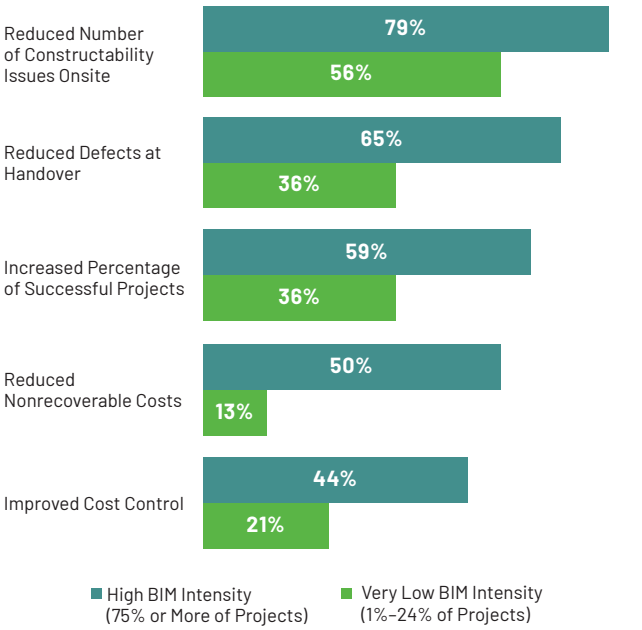
Impact of BIM Intensity on Top Five BIM Benefits for Architects and Engineers

Dodge Data & Analytics, 2021



Impact of BIM Intensity on Top Five BIM Benefits for Contractors

Dodge Data & Analytics, 2021



Summary of Global Findings

Perceived ROI of BIM

There is no standard, globally accepted way to measure the ROI (return on investment) of BIM. In studies of BIM users over the last 12 years, Dodge has asked them to select which of seven percentage ranges they best believe represents their company's ROI on its BIM investments to that point. This is referred to in Dodge reports as the perceived ROI on BIM. The charts on this page combine several of the seven range options into three broad ROI tiers.

Perceived ROI by Company-Type and Region

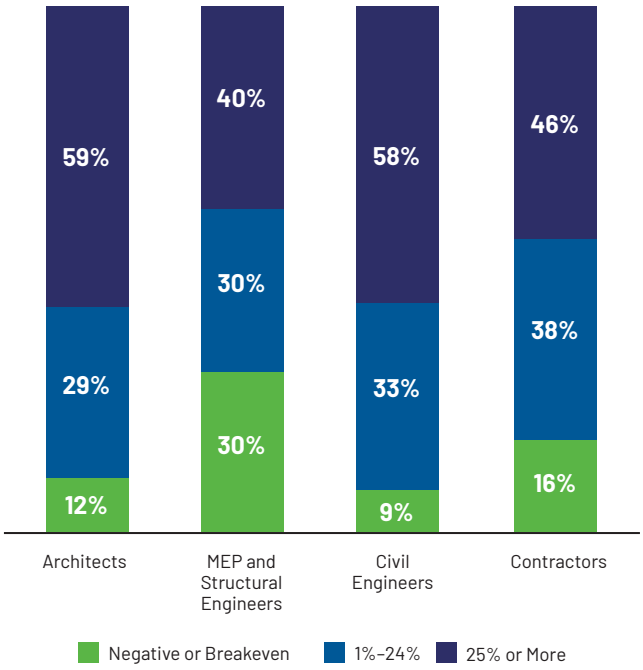
The chart at right shows this analysis by company-type. While architects report somewhat higher ROI than contractors, civil engineers differ notably from MEP and structural firms. This points to a need to focus on helping these professionals engage more successfully with BIM.

The chart at bottom shows the analysis by region and provides the overall response as a baseline for comparison.

- 48% or more report a good (at least a 25%) ROI in every region studied except North America, which also shows the highest number at negative or breakeven (31%).
- This contrasts sharply with France and UK/Ireland, where no users report negative or breakeven.

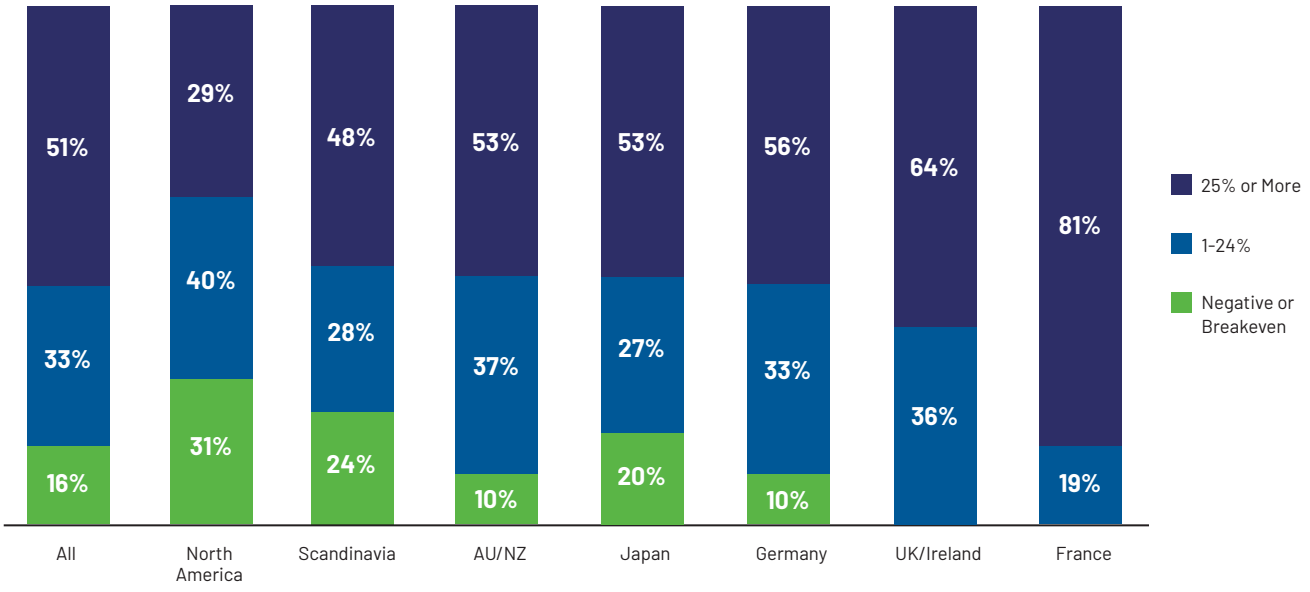
Perceived ROI of BIM by Type of Company

Dodge Data & Analytics, 2021



Perceived ROI of BIM by Region

Dodge Data & Analytics, 2021



Summary of Global Findings

Digital Transformation

While the overall global design and construction industry is clearly going through a comprehensive digital transformation, the pace varies widely by company. All respondents to this survey (BIM users as well as nonusers) were asked to assess where they believe their company is in its digital journey from one of four stages shown in the charts on this page.

BIM Users' Progress on Digital Transformation

The chart at right focuses just on BIM users. It compares all BIM users with those using BIM on at least 75% of their projects (high BIM intensity). The findings show how more BIM use correlates directly with overall digital transformation.

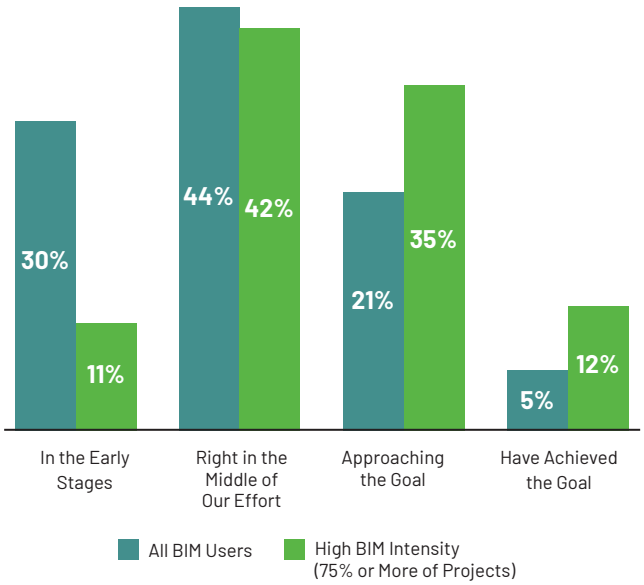
All Respondents' Progress on Digital Transformation by Region

Digital transformation is impacting all companies in the industry whether they are currently using BIM or not. The chart at bottom shows the averages of how all respondents from each region studied believe their transformation is progressing. The aggregate of all responses is also shown for comparison.

While there are variations, in general each region is fairly close to the average for all, suggesting that there is more commonality than difference in everyone's path toward our exciting digital future.

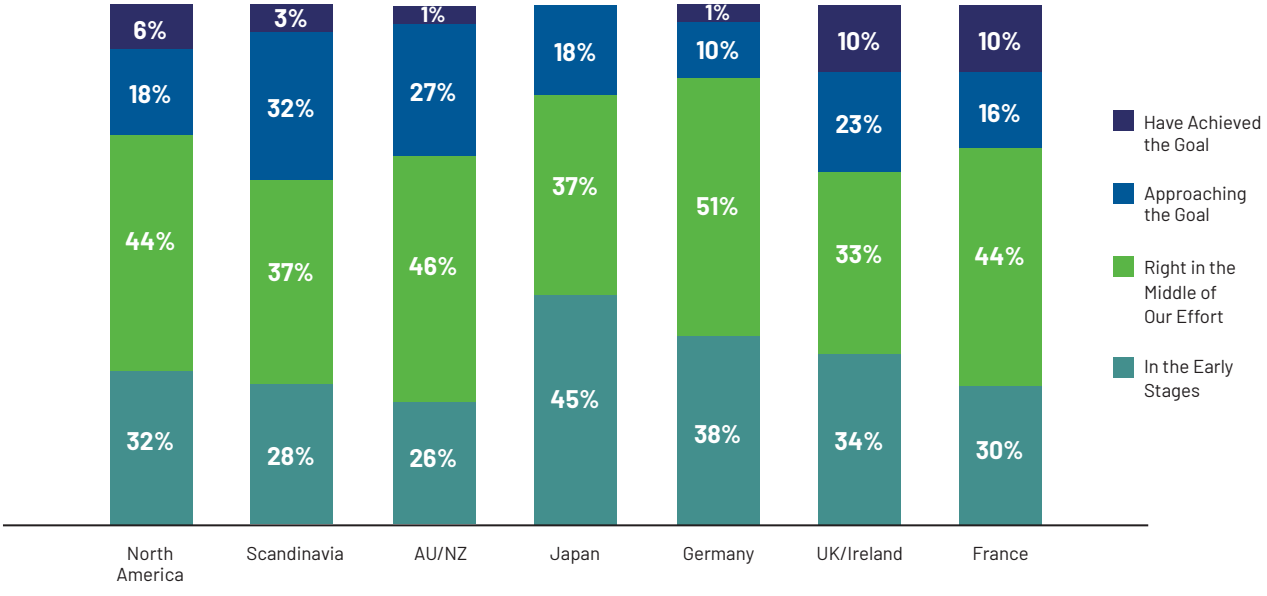
BIM Users' Reported Progress on Digital Transformation

Dodge Data & Analytics, 2021



All Respondents' Reported Progress on Digital Transformation by Region

Dodge Data & Analytics, 2021



Methodology

This global study was conducted to assess the extent to which BIM has been embraced in major regions of the world, including the experience of those who have used BIM in terms of related activities they employ, the benefits they receive, the ROI they get from BIM, the BIM engagement they expect and experience from other team members on projects. The study also examined digital transformation in general, and the current and future use of emerging technologies and processes in particular.

This research was administered online from October 2020 to March 2021. The survey data was collected from the Dodge Data & Analytics Architect and Contractor Panels, the Dodge Database of construction professionals and memberships of partnering associations (AMCA, Australian Constructors Association, CIBSE, CICES, CINOV, COMIT, GBC Finland, GBCA, Norwegian GBC, Planen Bauen 4.0, RICS, RIL, USGBC and UNSFA). The Dodge Data & Analytics Architect and Contractor Panels contain representative samples of architects and contractors across the US. The panelists are identified by many categories, including size, region, types of projects undertaken and specialty.

Respondent Profile

REQUIREMENTS

Respondents were required to be employed by an architecture firm, site design firm, construction company, engineering firm or consulting company, and located in Australia, Canada, France, Germany, Japan, New Zealand, Scandinavia, UK or the US.

BIM USERS

Most of the analysis focuses on respondents who report that their company uses BIM. In total, 641 respondents report using BIM in this study, including 81 in Australia and New Zealand.

The following definition was provided for BIM to identify those using it: Building Information Modeling (BIM) is a process that begins with the creation of an intelligent 3D model and enables document management, coordination and simulation during the entire lifecycle of a project (plan, design, build, operation and maintenance).

BIM USER PROFILES

The responses of BIM users in the global study include a cross section of types of job roles and company sizes.

- **Types of Job Roles:**
  - Architect: 37%
  - Construction Professional: 32%
  - Civil Engineer: 12%
  - Building Engineer (structural, mechanical, electrical, plumbing): 10%
  - Consultant: 5%
  - Other: 5%
- **Size of Company by Number of Employees:**
  - Very Large (500 or more): 23%
  - Large (100 to 499): 30%
  - Midsize (50 to 99): 17%
  - Small (Fewer Than 50): 29%
  - Prefer Not to Answer: 1%

Seventy percent of the BIM users primarily work on vertical buildings and 30% on infrastructure projects.

Finally, the study also explores the differences in responses among BIM users in the seven regions/countries included in the study. Because of a high number of smaller companies in the responses from North America, weighting was applied to make the proportion of North American respondents in varying size categories (by number of employees) match those of respondents located in regions other than North America.

- North America: 34%
- France: 12%
- Australia/New Zealand: 12%
- Scandinavia: 11%
- Germany: 10%
- Japan: 10%
- UK/Ireland: 10%

DIGITAL TRANSFORMATION

The questions on digital transformation include responses from BIM users and nonusers. 843 total responses were received on the stage of digital transformation, with 85 from Australia/New Zealand, and 576 were asked about the technologies/processes they use and plan to adopt, with 49 from Australia/New Zealand for this question.

Resources

Organizations, websites and publications to help you get smarter about BIM and digital transformation.

Dodge Construction Network
Main Website:
www.construction.com
Dodge Construction Central:
www.construction.com/products
Market & Competitive Intelligence:
www.construction.com/products/construction-market-data
Sweets:
www.construction.com/products/sweets
SmartMarket Reports:
www.construction.com/toolkit/reports

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We thank all those who shared their insights and experiences, including the thought leaders featured in this report and those who provided us with case studies or shared their insights in our feature articles.

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Australian Constructors Association: **www.constructors.com.au**
Chartered Institution of Building Services Engineers: **www.cibse.org**
Chartered Institution of Civil Engineering Surveyors: **www.cices.org**
Federation CINOV: **www.cinov.fr/la-federation-cinov**
COMIT (Construction Operation & Maintenance through Innovative Technology): **www.comit.org.uk**
Green Building Council of Australia: **https://new.gbca.org.au**
Green Building Council Finland: **https://figbc.fi/en**
Norwegian Green Building Council: **https://byggalliansen.no**
Planen Bauen 4.0: **https://planen-bauen40.de**
RIL (Finnish Association of Civil Engineers): **www.ril.fi/en/ril.html**
Royal Institution of Chartered Surveyors: **www.rics.org/uk**
US Green Building Council: **www.usgbc.org**
UNSFA (L'Union des Architectes): **www.unsfa.fr**

Other Resources:

BIMForum: **bimforum.org**
buildingSMART International: **www.buildingsmart.org**
Construction Innovation Hub: **https://constructioninnovationhub.org.uk**
Global BIM Network: **www.globalbim.org**
Lean Construction Institute: **leanconstruction.org**
National Institute of Building Sciences Building Information Management (BIM) Council: **www.nibs.org/bimc**

■ Design and Construction Intelligence

SmartMarket Insight

www.construction.com

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