

McGraw_Hill
CONSTRUCTION ENR

connecting people_projects_products

ENR 2003 Technology Study

The McGraw-Hill Companies

Conducted by Advantage Business Research, NY; March 2003

Purpose of Research

- To determine ENR subscriber involvement in computer hardware, software & peripherals.
- To determine ENR subscriber involvement in web-based applications.
- To determine which specific operating systems, hardware, computer systems, printers, and copier equipment ENR subscribers are currently using and likely to buy.
- To determine which specific software packages ENR subscribers are currently using and likely to buy.
- To determine sources of information used when making purchase decisions about computer hardware, software, peripherals and web-based applications.

Methodology

A four-page questionnaire was mailed on February 24, 2003 to a total of 2000 randomly selected ENR subscribers.

A postage paid return envelope and \$1 incentive were included.

By March 18, 2003, 418 usable questionnaires were returned for a 21% overall response rate. This study has a margin of error of +/- 5% at the 95% confidence level.

The research was conducted by Advantage Business Research, New York.

Summary of Results

1. Computer Hardware, Software & Peripherals

- Respondents are most likely to currently use:
Windows 2000, Desktop PIC, Office 2000
Dell computer systems, Hewlett-Packard printers/plotters, Canon copier equipment
- Total 2003 budgets averaged \$347,000
- 74% of respondents are involved in the purchase decision
- The top 3 sources of information for making these decisions are product literature, other professionals and trade publication advertising.
- The top 4 software applications currently used are job costing/accounting/payroll, scheduling, computer aided design/drafting and project management/control.

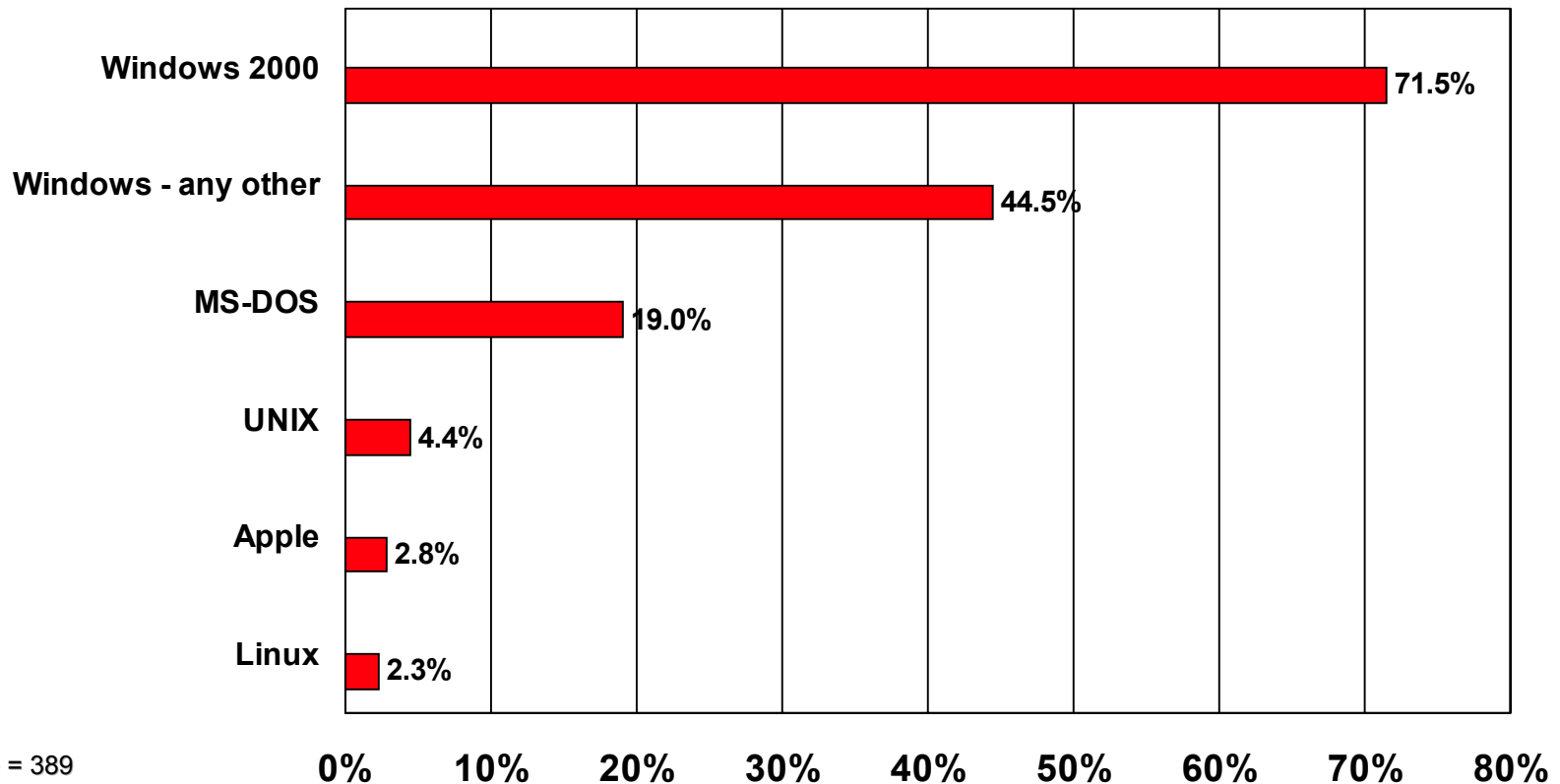
2. The Internet & Web-based Applications

- Almost all respondents use the Internet for research.
- 66% of respondents are involved in the purchase decision for applications.
- The top 3 sources of information for making these decisions are product literature, trade publication advertising and outside consultants.



Computer Hardware, Software & Peripherals

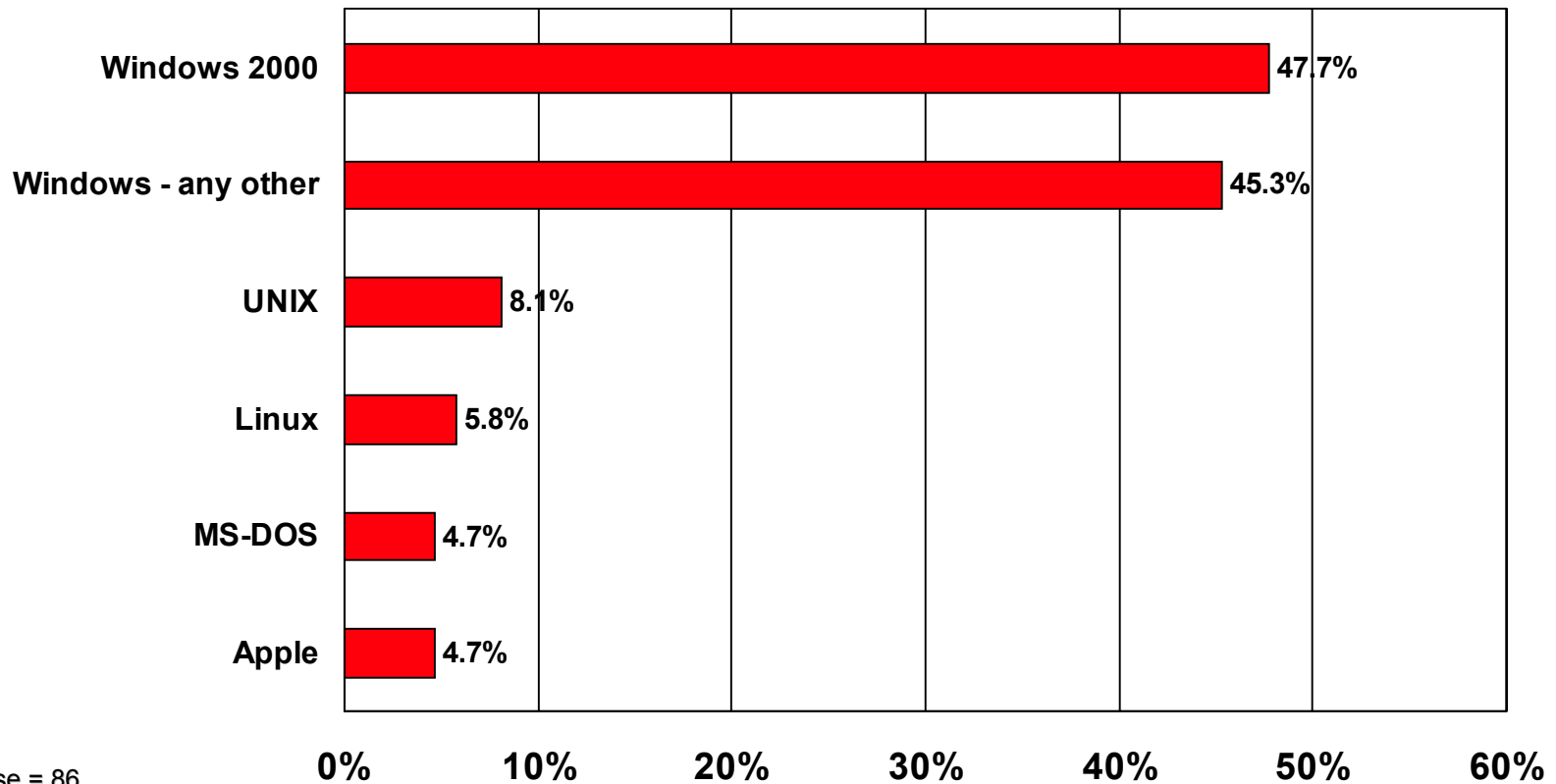
Which computer operating systems does your firm currently use?



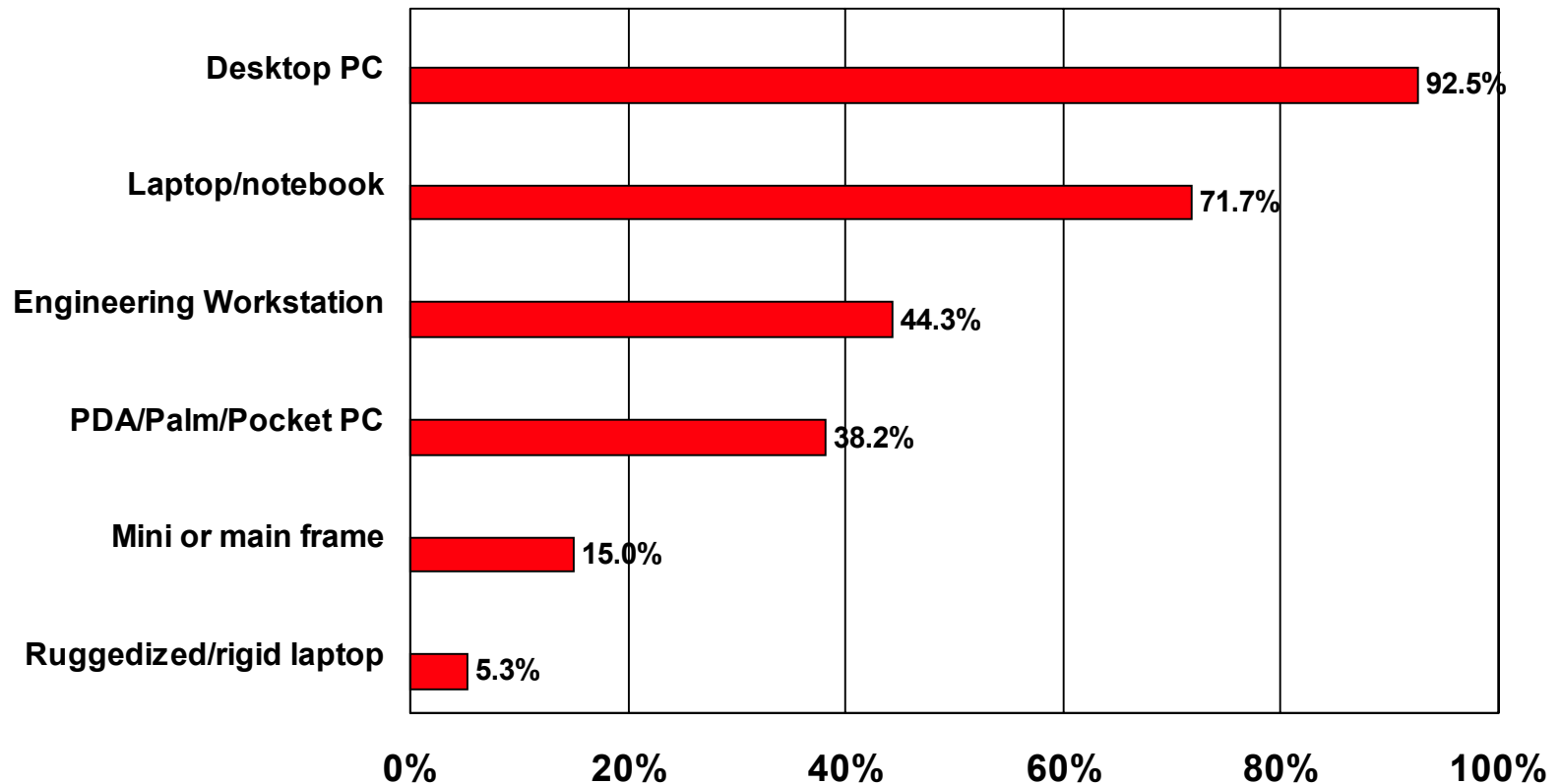
Base = 389

Which computer operating systems is your firm likely to buy in the next 12 months?

(Of those “Likely to buy in the next 12 months”)



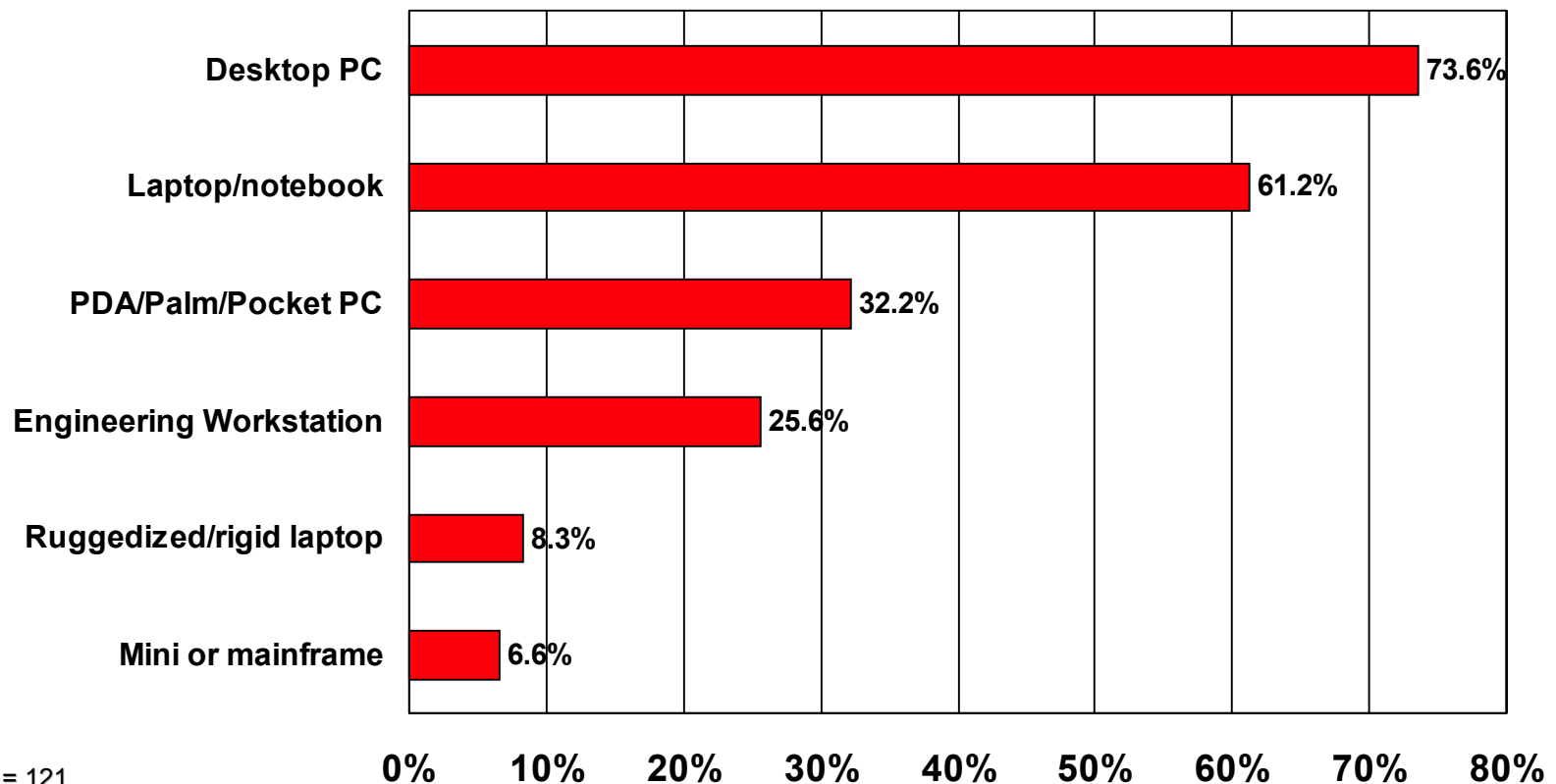
Which computer hardware platforms does your firm currently use?



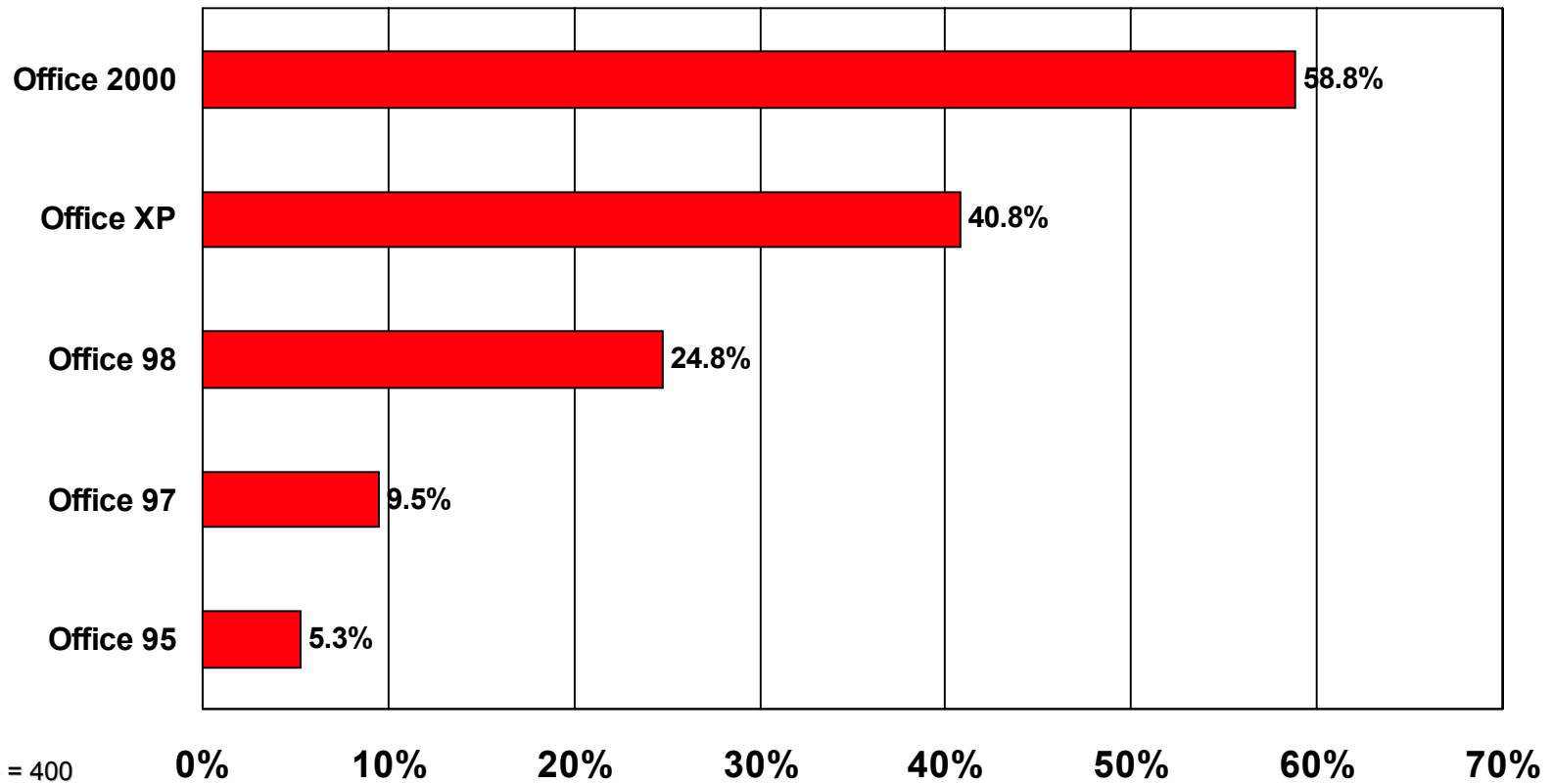
Base = 361

Which computer hardware platforms is your firm likely to buy in the next 12 months?

(Of those “Likely to buy in the next 12 months”)

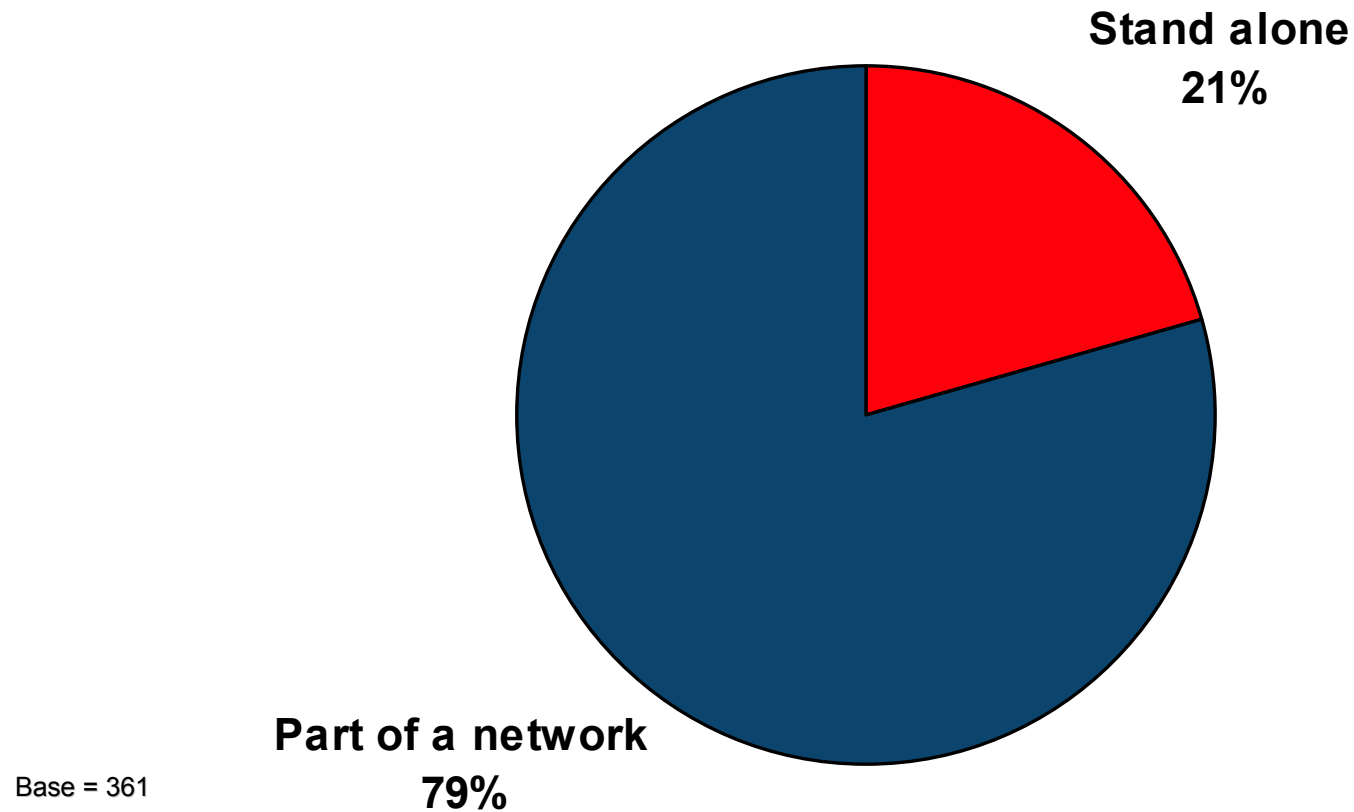


What version(s) of Microsoft Office is your firm currently using?

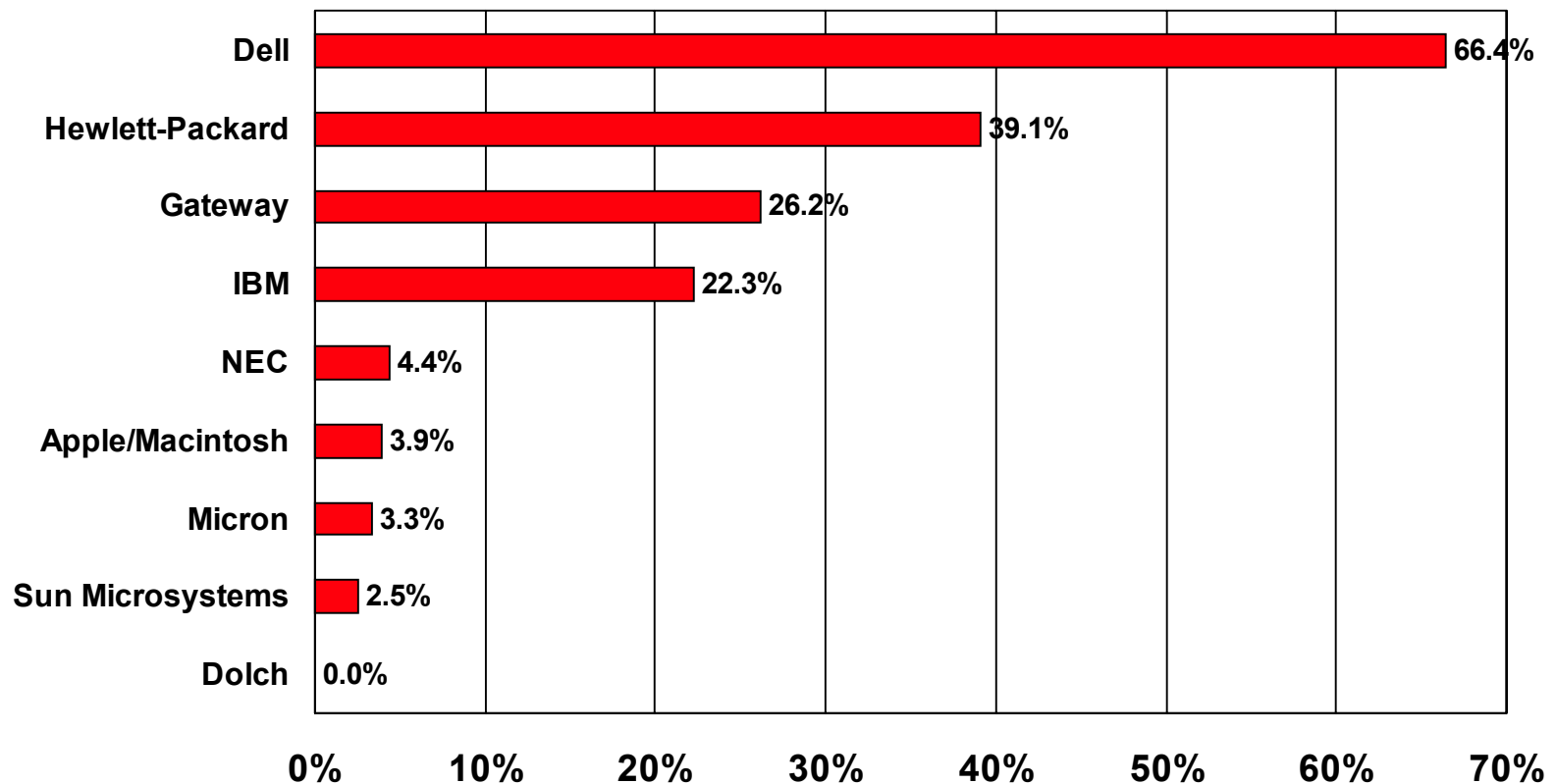


97% of respondents' firms currently use some version of Microsoft Office

Are your firm's computers stand alone or part of a network?



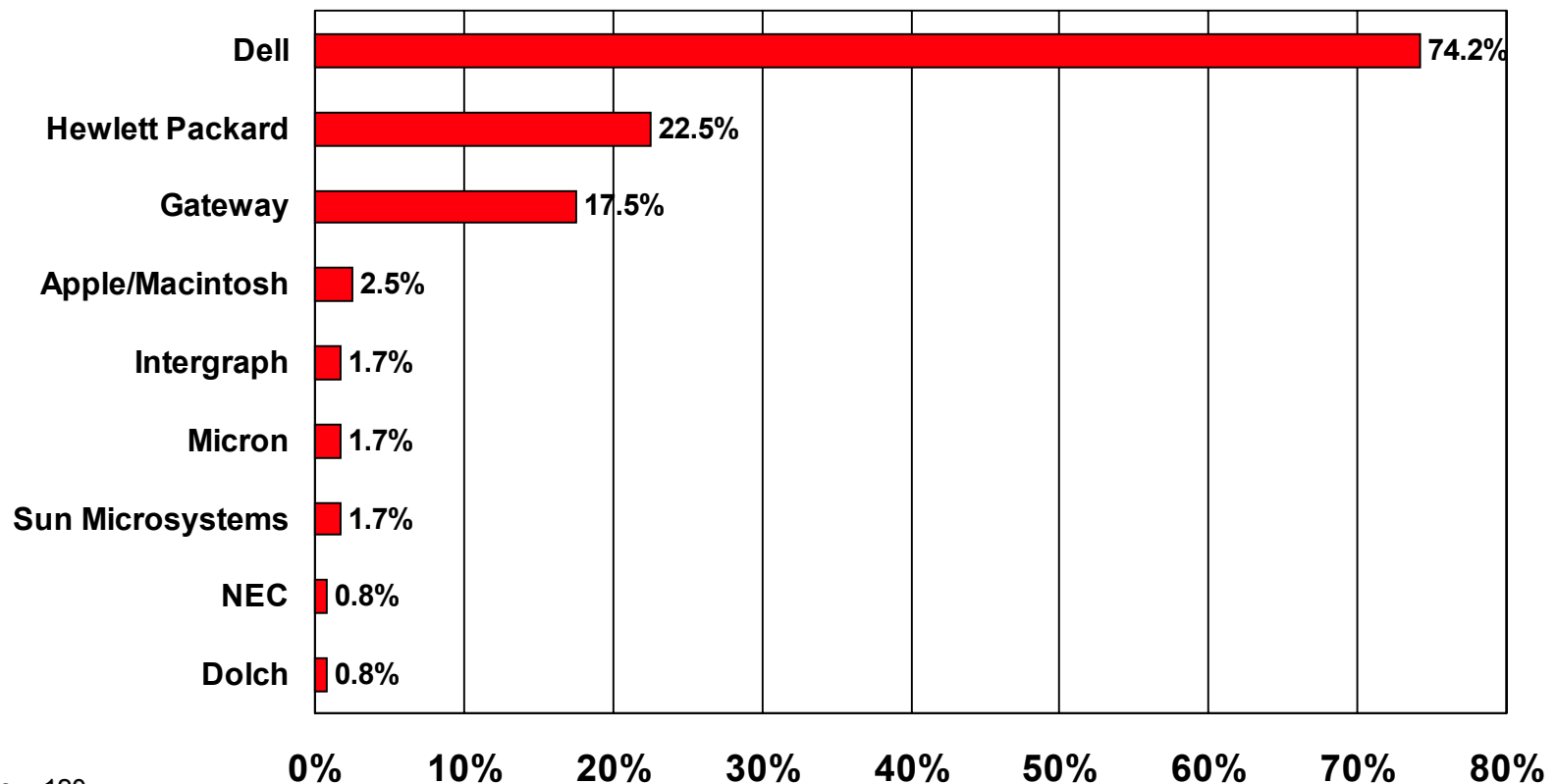
Which manufacturers of computers systems does your firm currently use?



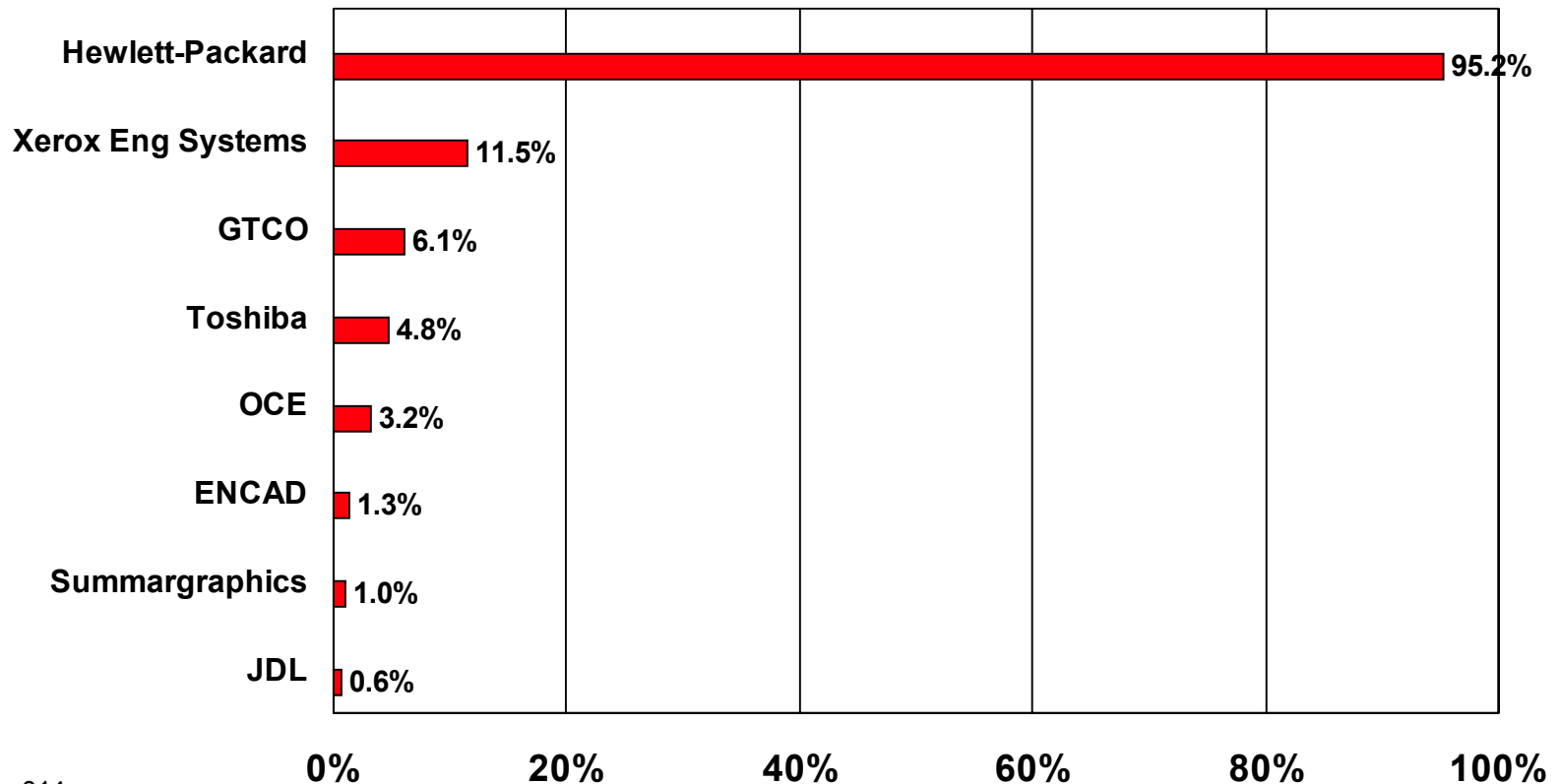
Base = 363

Which manufacturers of computers systems is your firm likely to buy in the next 12 months?

(Of those “Likely to buy in the next 12 months”)

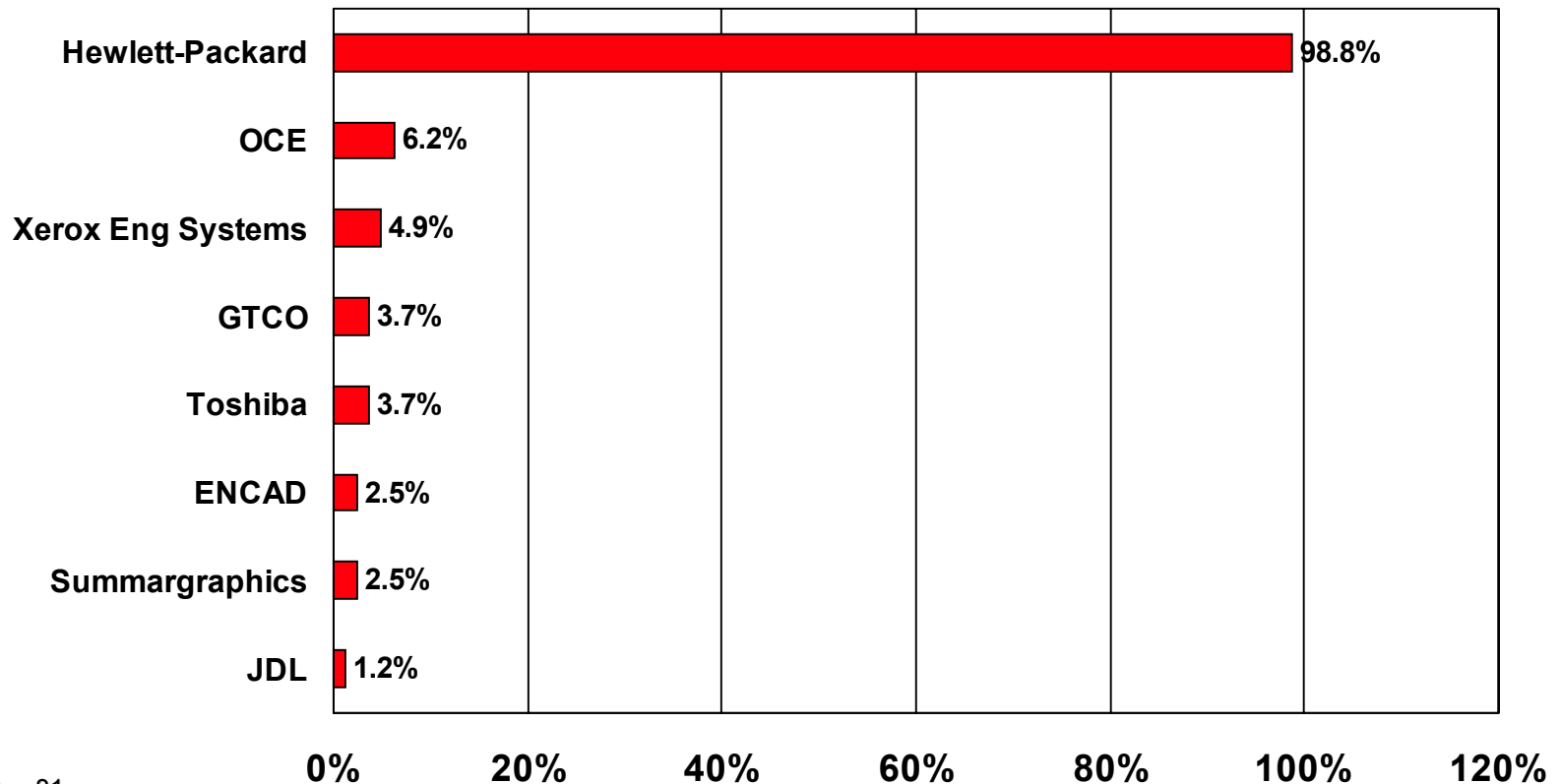


Which manufacturers of printers/plotters/digitizers does your firm currently use?

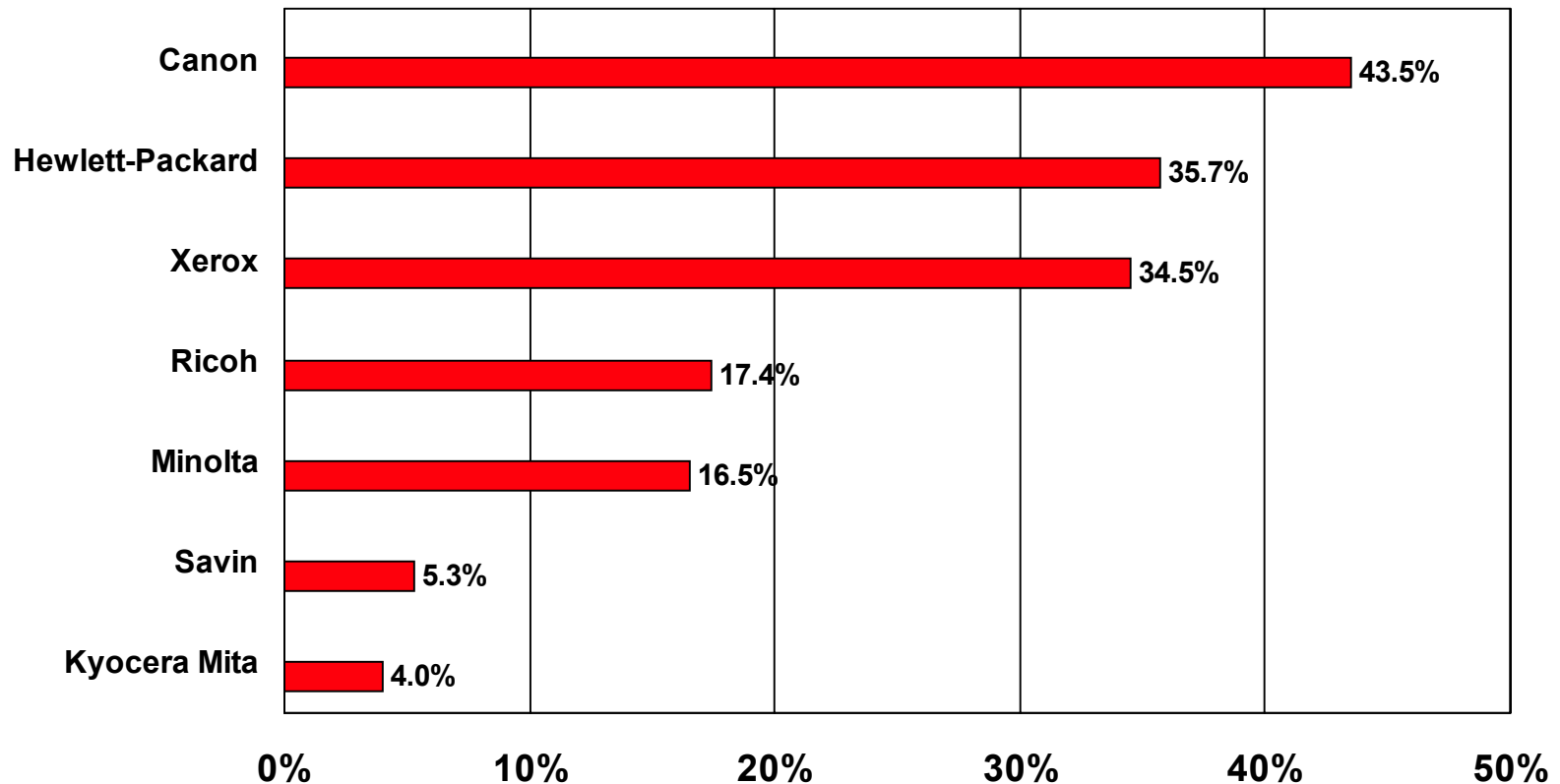


Which manufacturers of printers/plotters/digitizers is your firm likely to buy in the next 12 months?

(Of those “Likely to buy in the next 12 months”)



Which manufacturers of copier equipment does your firm currently use?

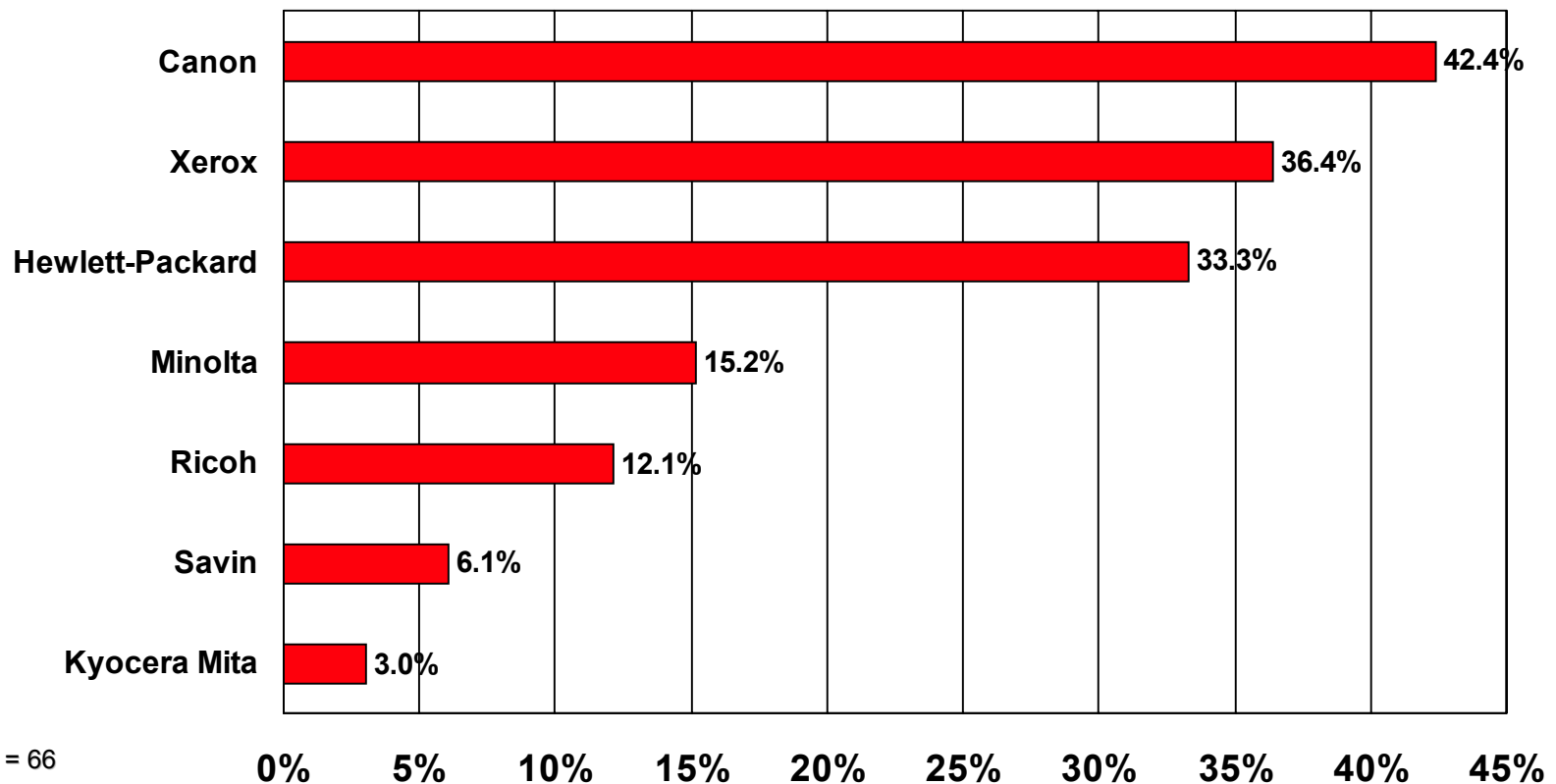


Base = 322

Source: American Business Research, March 2003

Which manufacturers of copier equipment is your firm likely to buy in the next 12 months?

(Of those “Likely to buy in the next 12 months”)

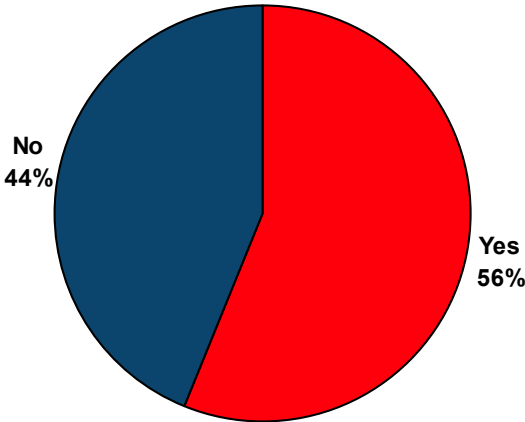


What do you expect your firm's budget in 2003 to be for the following:

Computer Systems	\$122,881
Printers/Plotters/Digitizers	\$68,203
Computer Software	\$83,810
General Copier Equipment	<u>\$72,009</u>
TOTAL	\$346,903

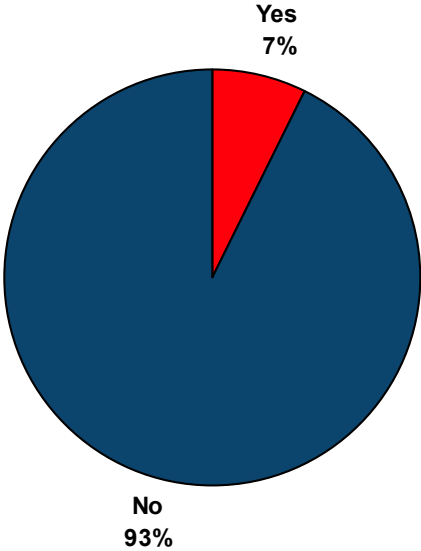
Does your firm have their home offices and job sites connected?

Does your firm have their home offices and job sites connected?



Base = 396

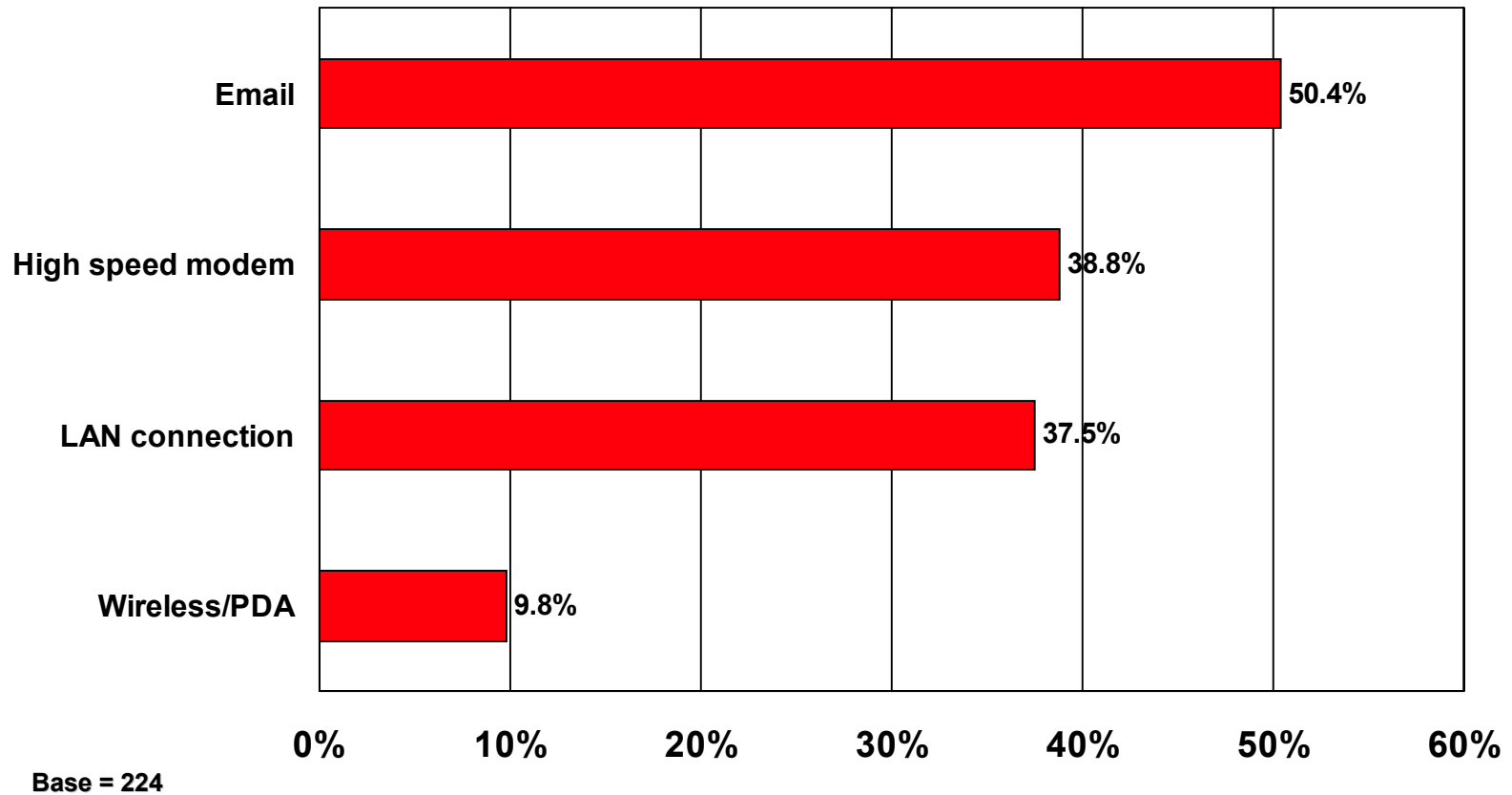
If no, does your firm plan to connect their home offices and job sites in the next 12 months?



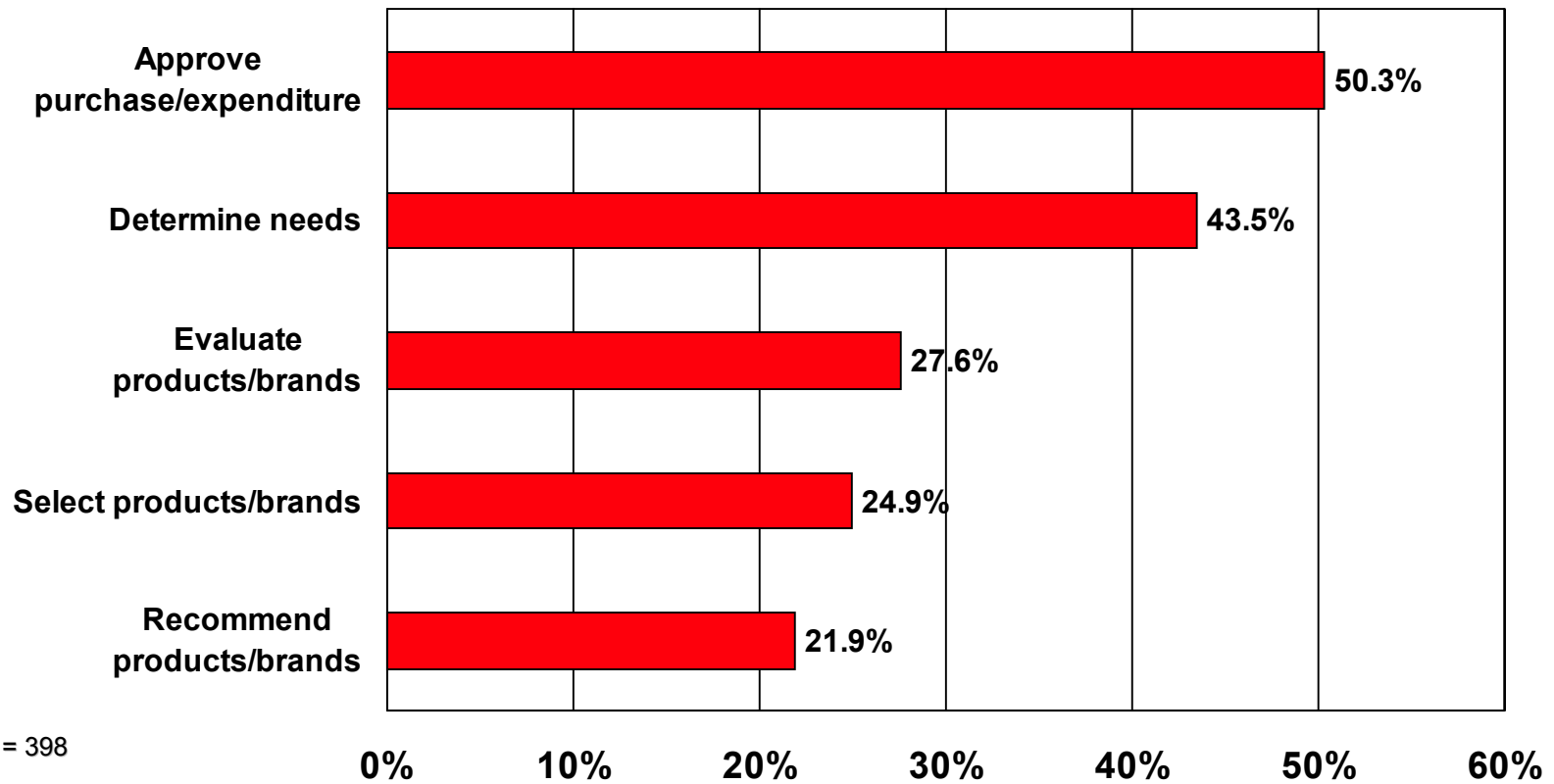
Base = 164

Source: American Business Research, March 2003

How are your home offices and job sites connected?



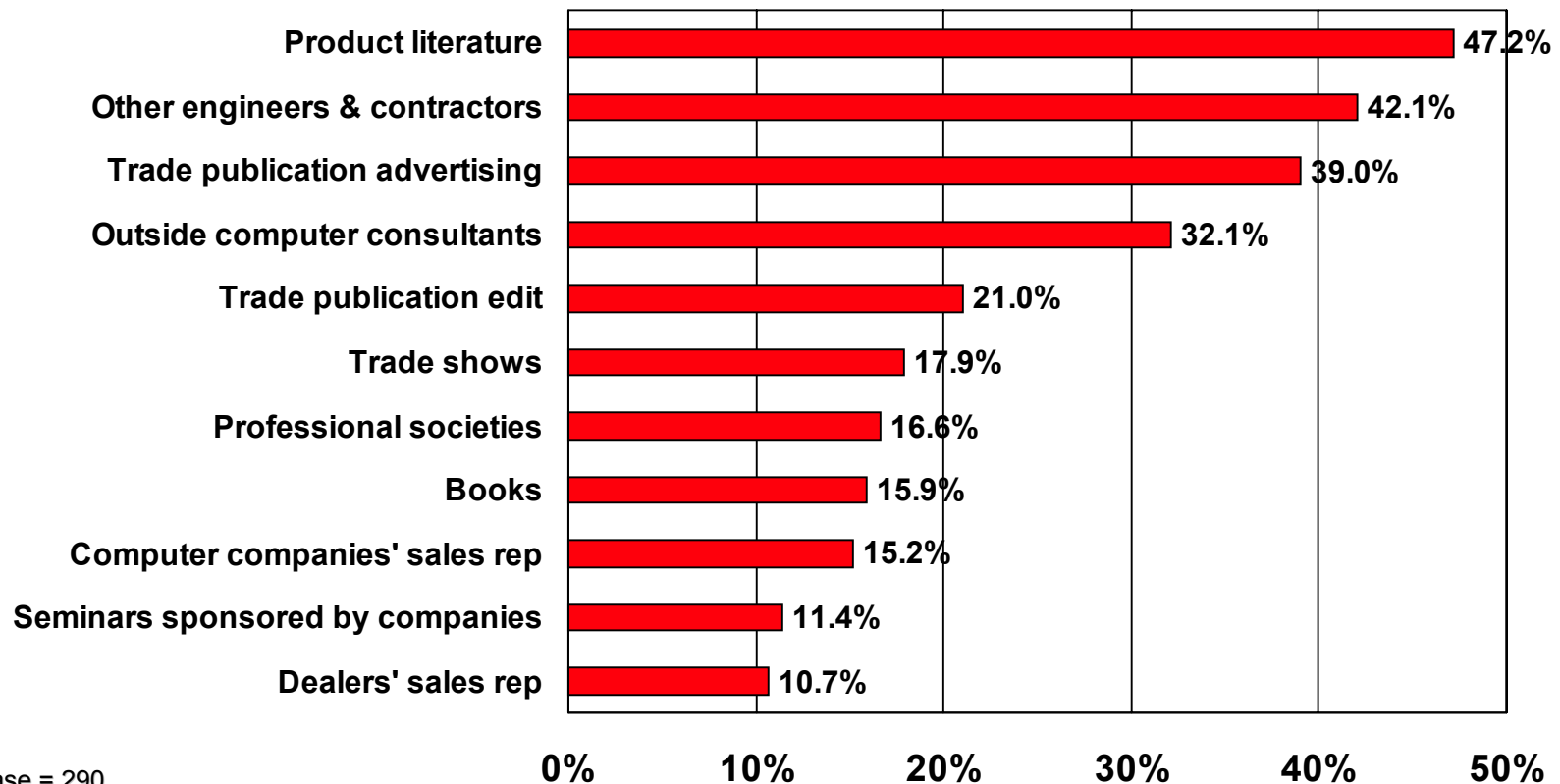
What is your involvement in your organization's purchase of computer hardware, software & peripherals?



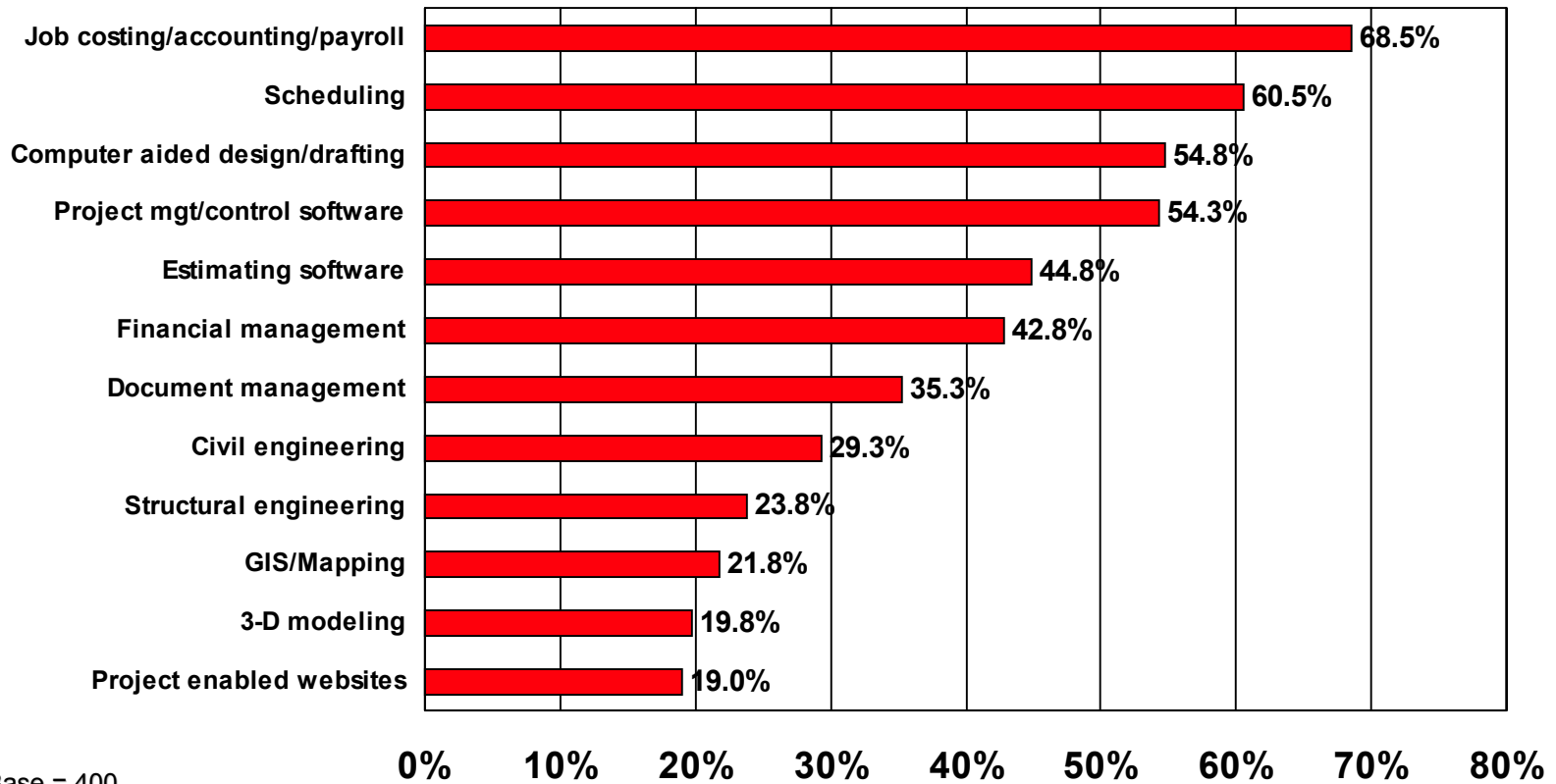
74% of respondents are involved in their organization's purchase of computer hardware, software & peripherals.

What sources of information help you in making decisions about computer hardware, software & peripherals?

(Of those "Involved in purchase decisions")

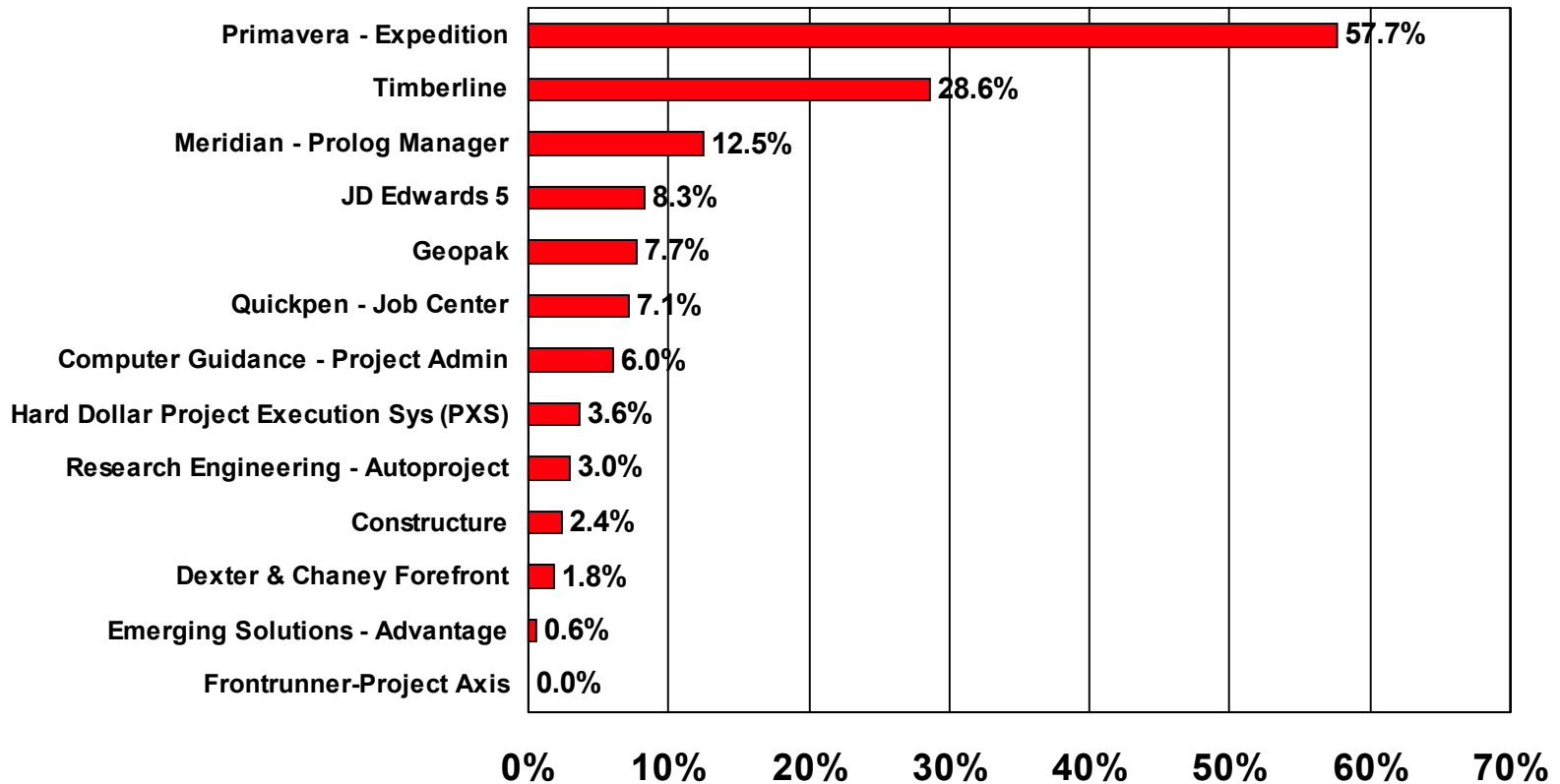


Which software applications are currently used within your firm?



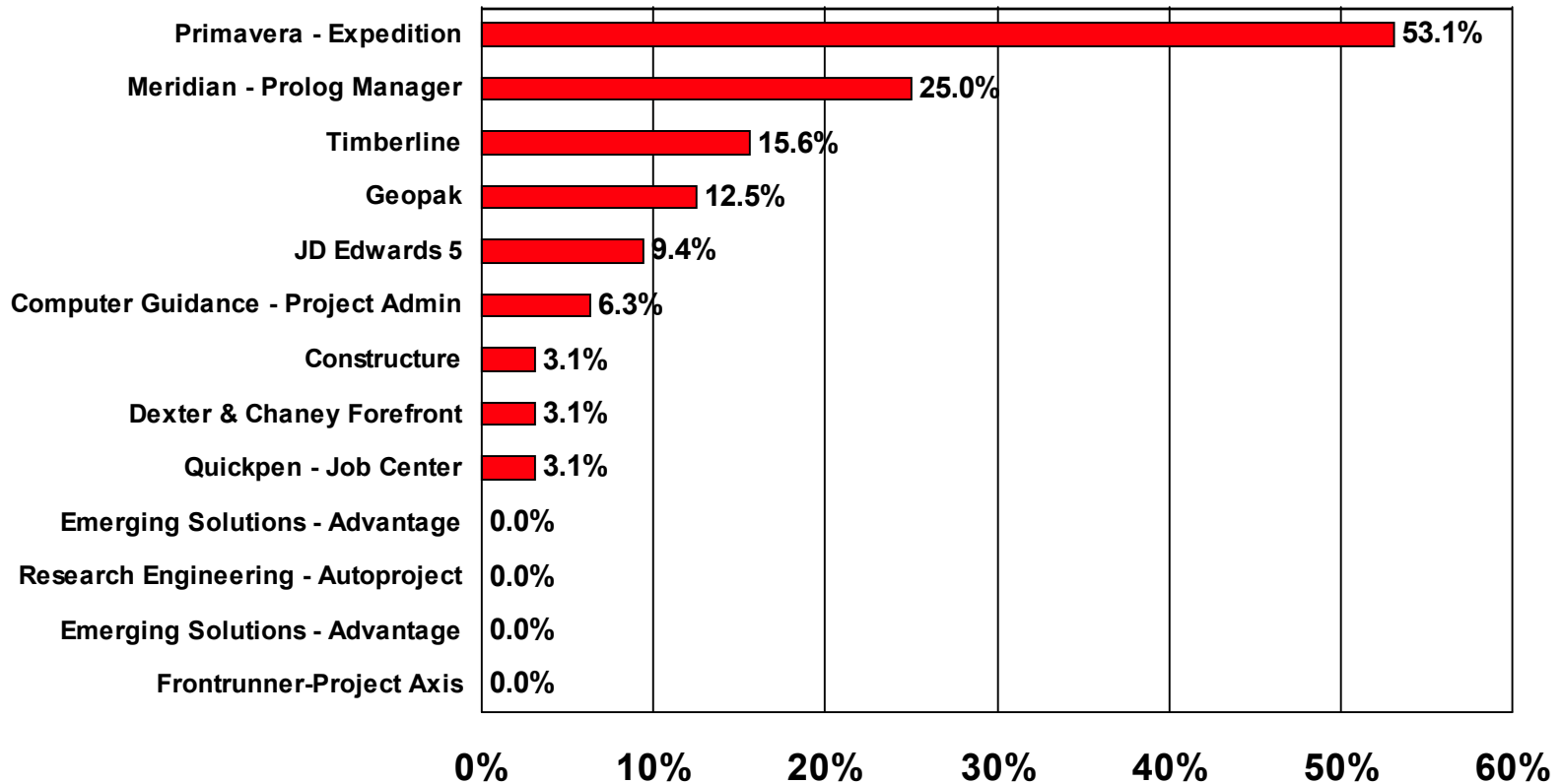
Which software applications are currently used within your firm?

Project Management/Contract Control Software



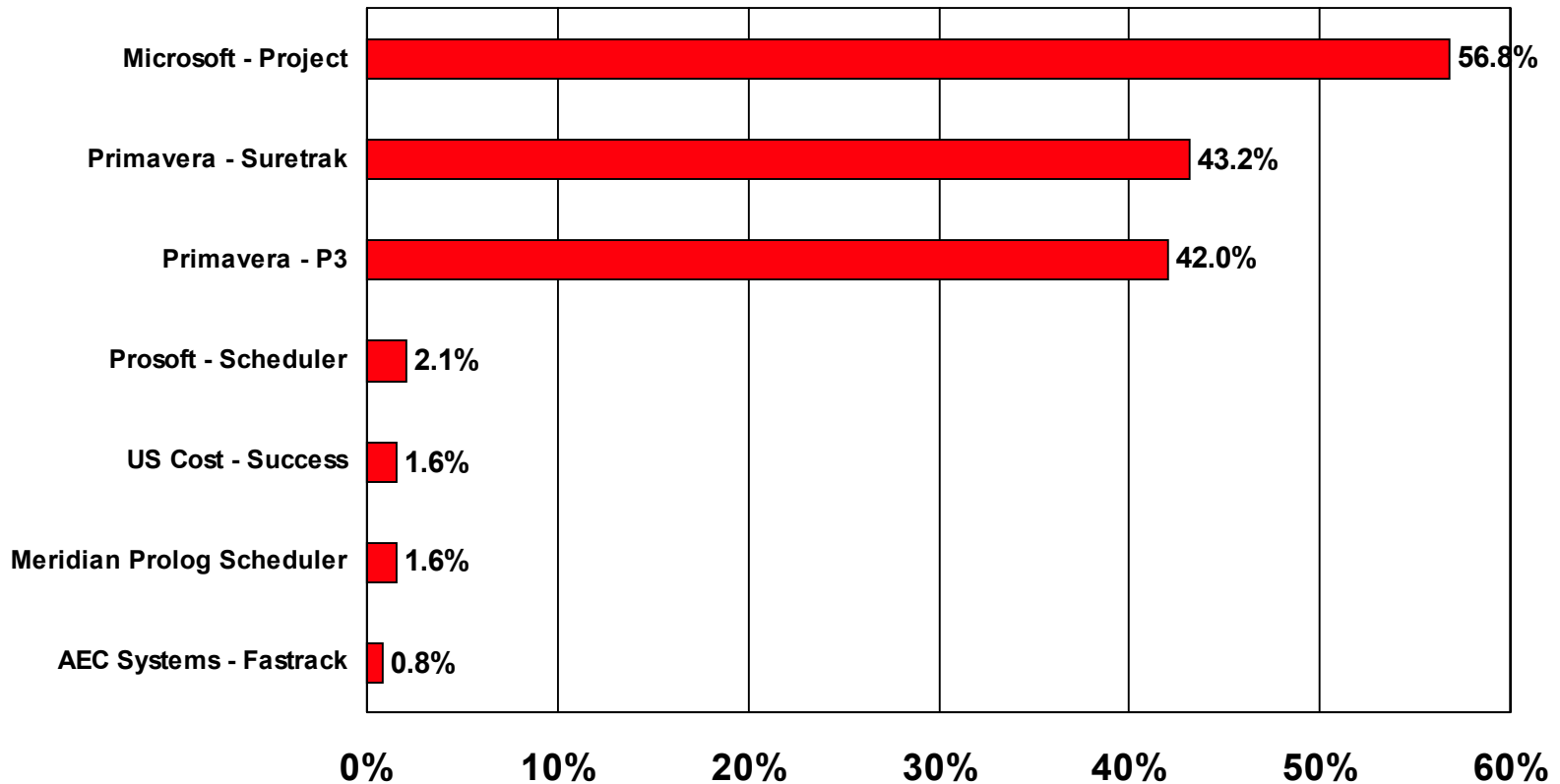
Base = 168

Which software applications are likely to be purchased by your firm in the next 12 months? *Project Management/Contract Control Software*



Base = 32

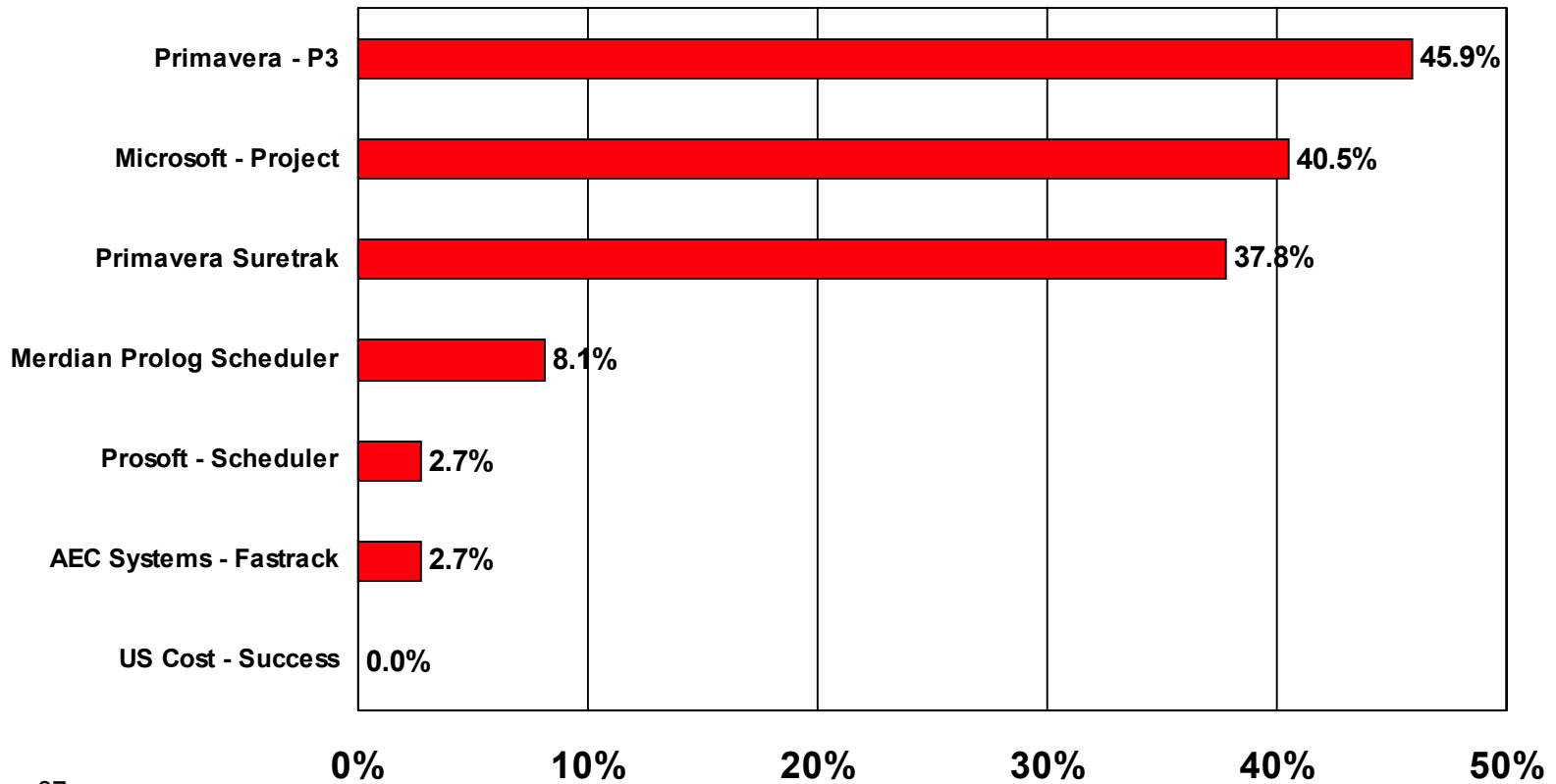
Which software applications are currently used within your firm? *Scheduling Software*



Base = 243

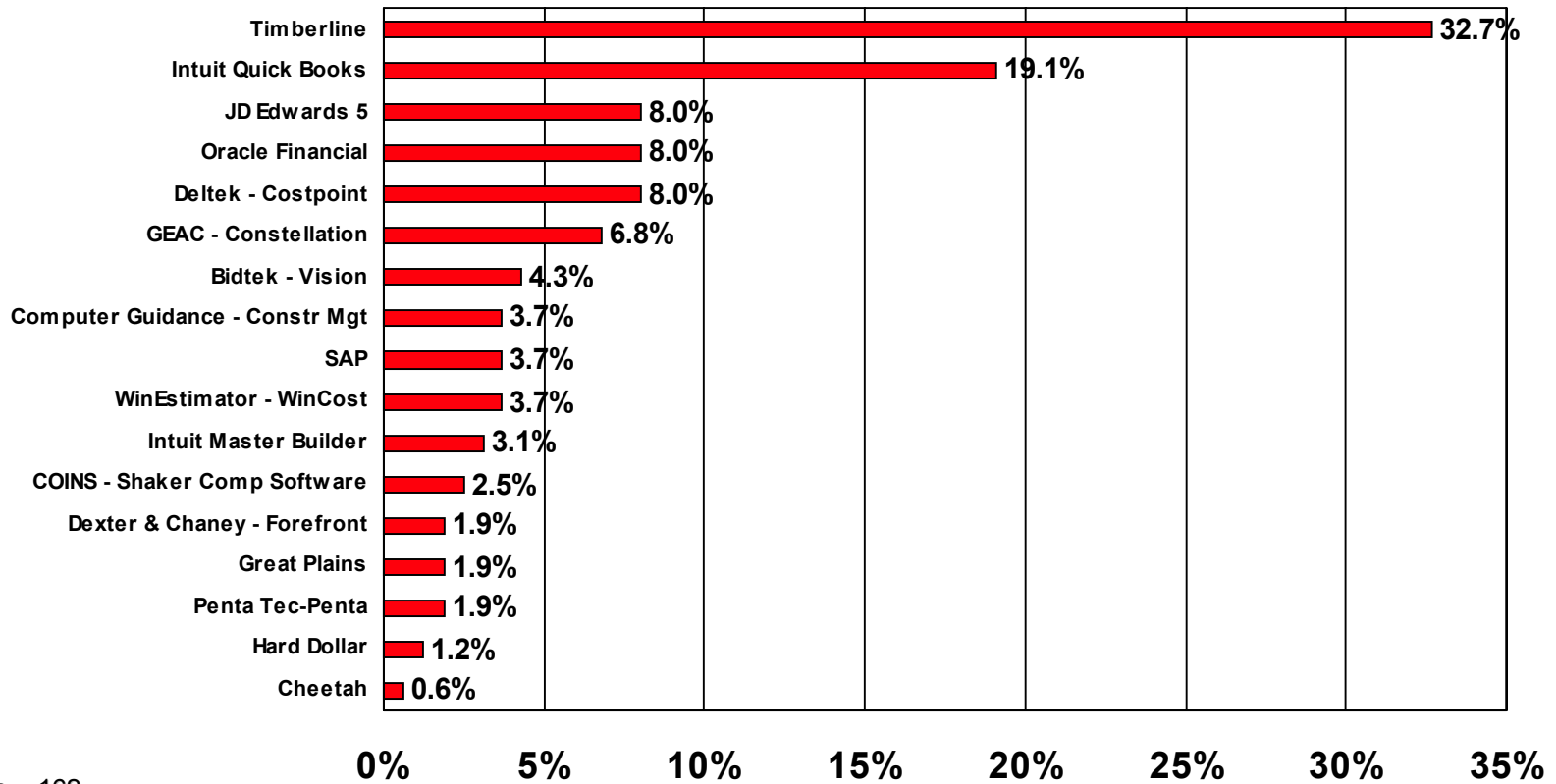
Which software applications are likely to be purchased by your firm in the next 12 months?

Scheduling Software



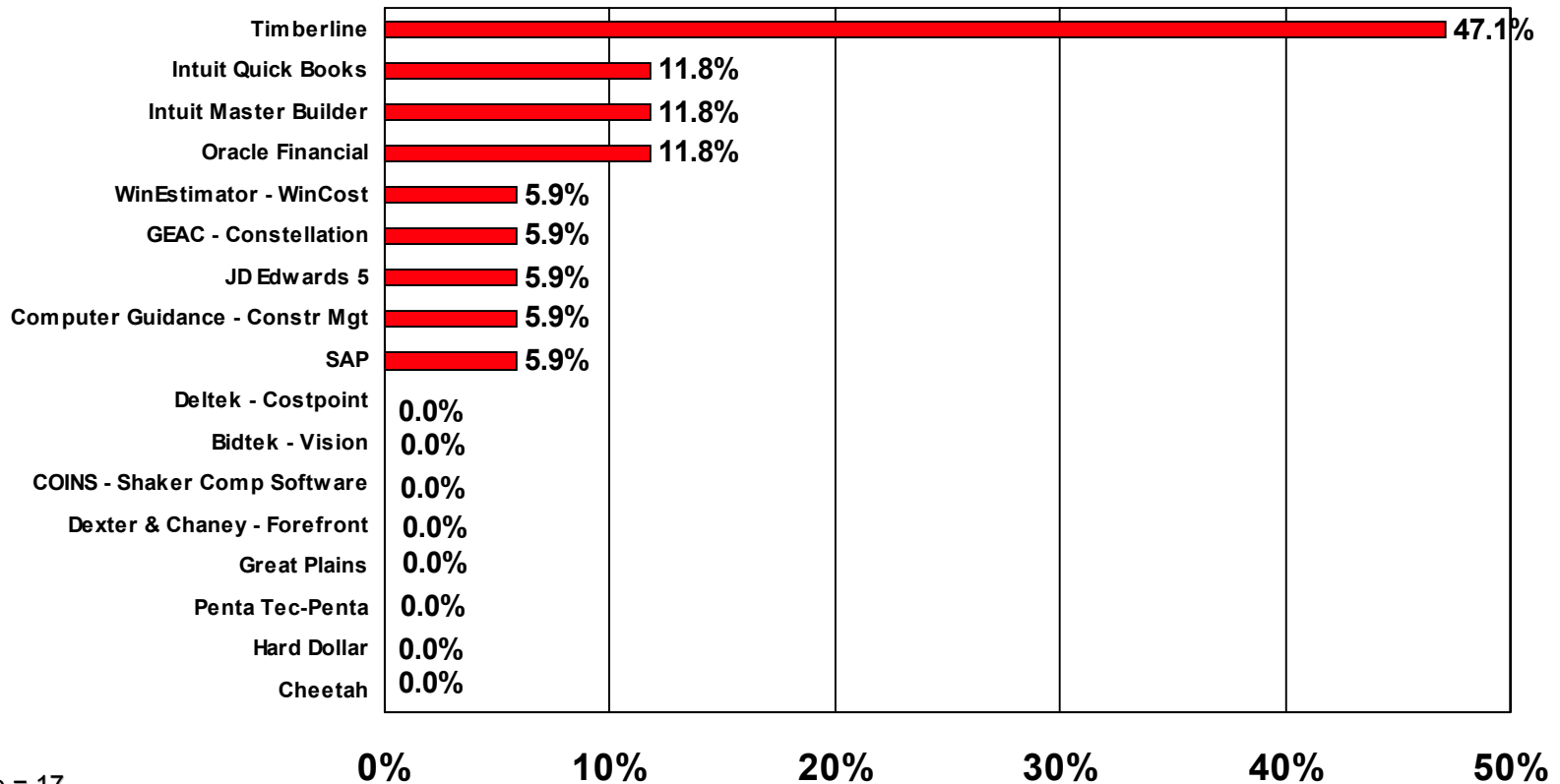
Base = 37

Which software applications are currently used within your firm? *Job Costing/Accounting/Payroll*



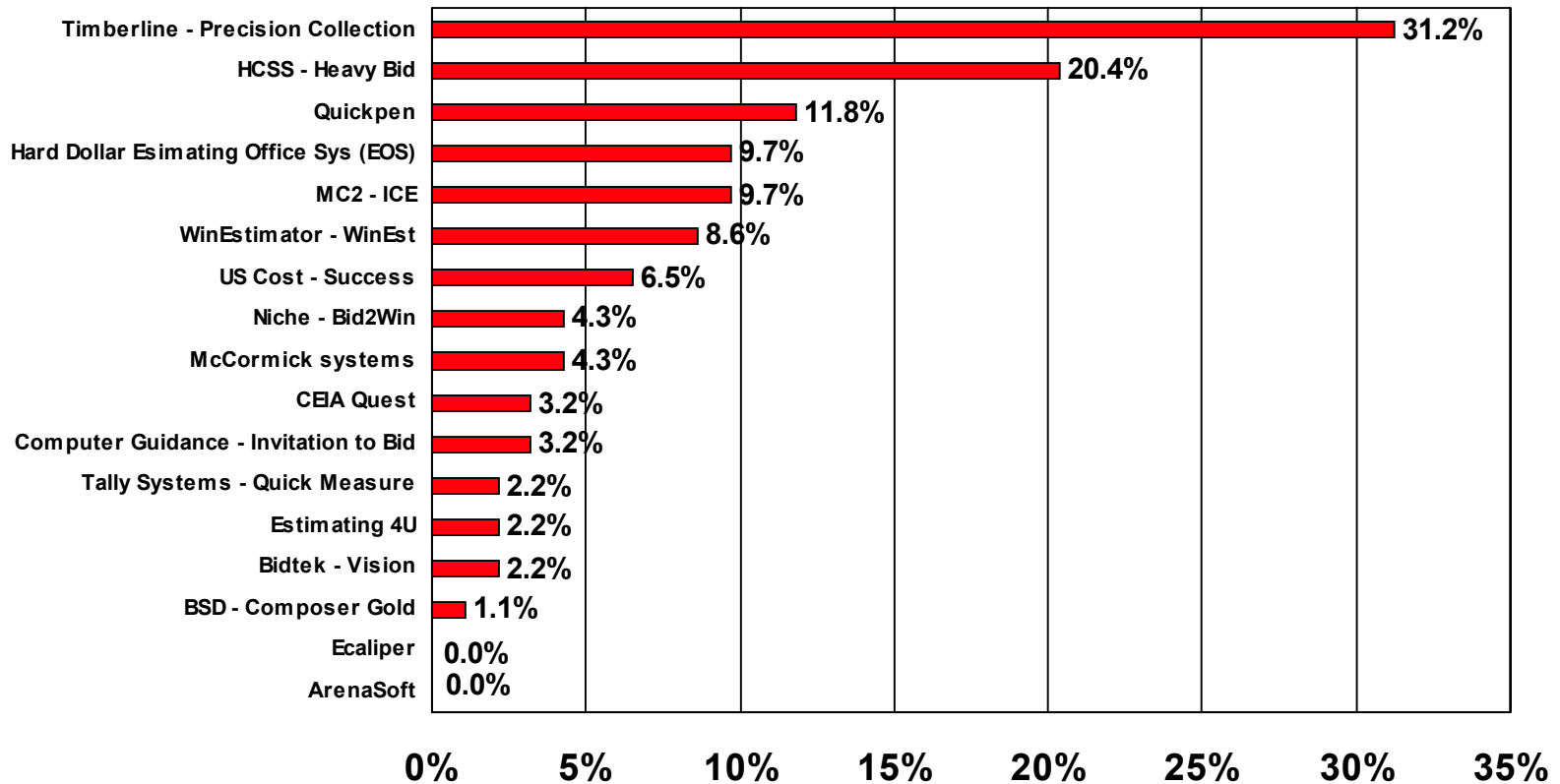
Which software applications are likely to be purchased by your firm in the next 12 months?

Job Costing/Accounting/Payroll



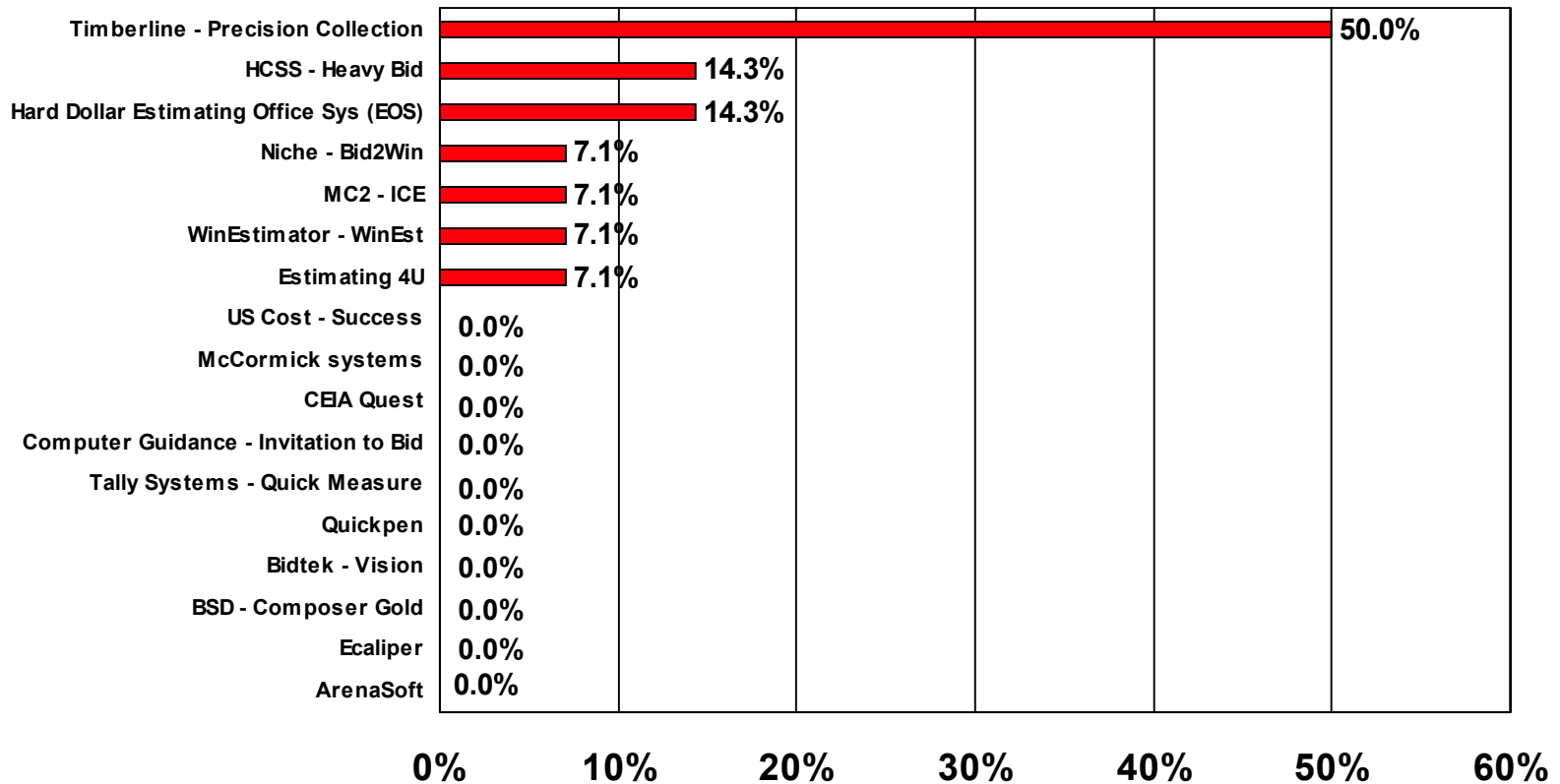
Which software applications are currently used within your firm?

Estimating Software



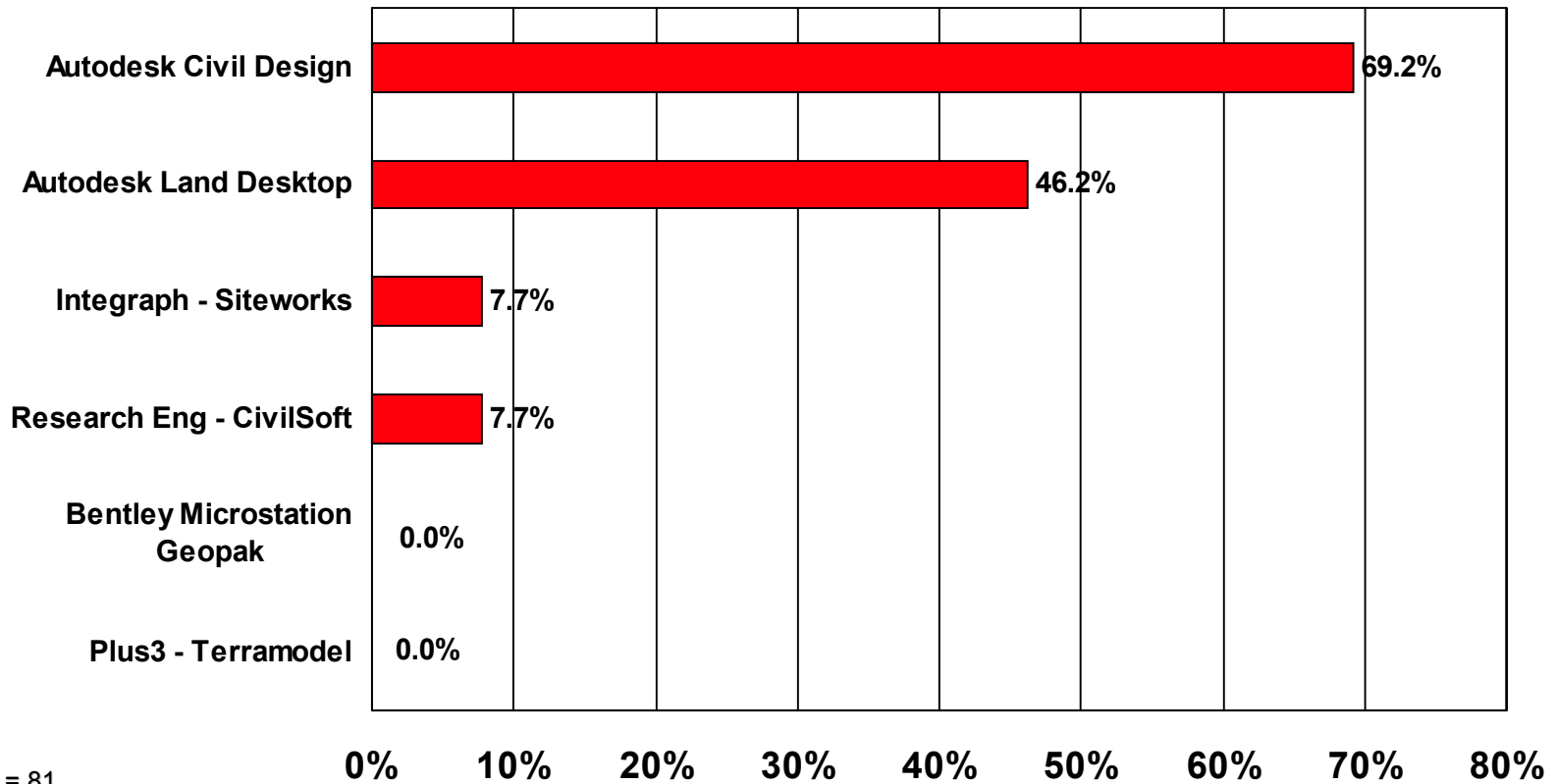
Which software applications are likely to be purchased by your firm in the next 12 months?

Estimating Software

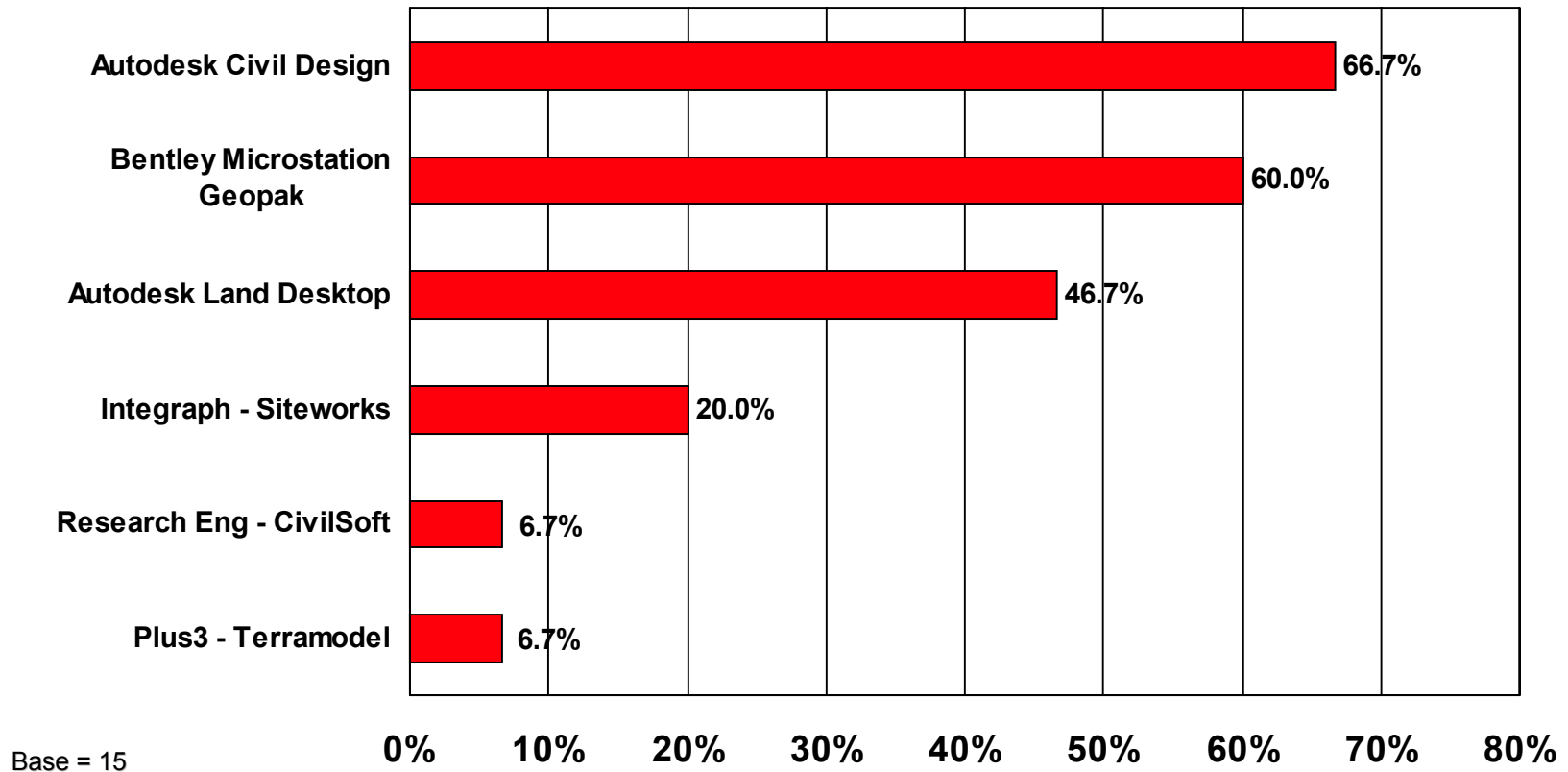


Base = 14

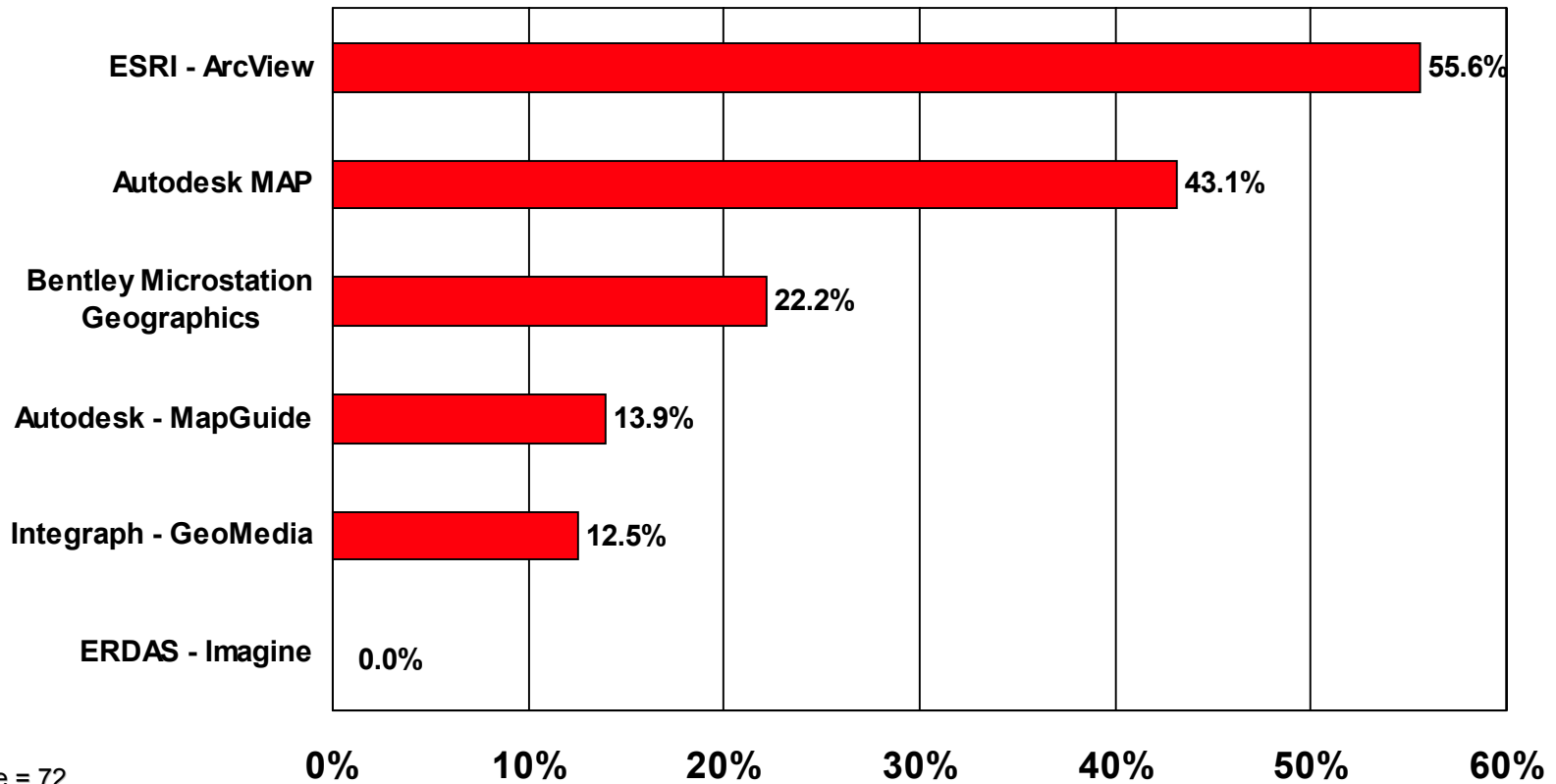
Which software applications are currently used within your firm? *Civil Engineering*



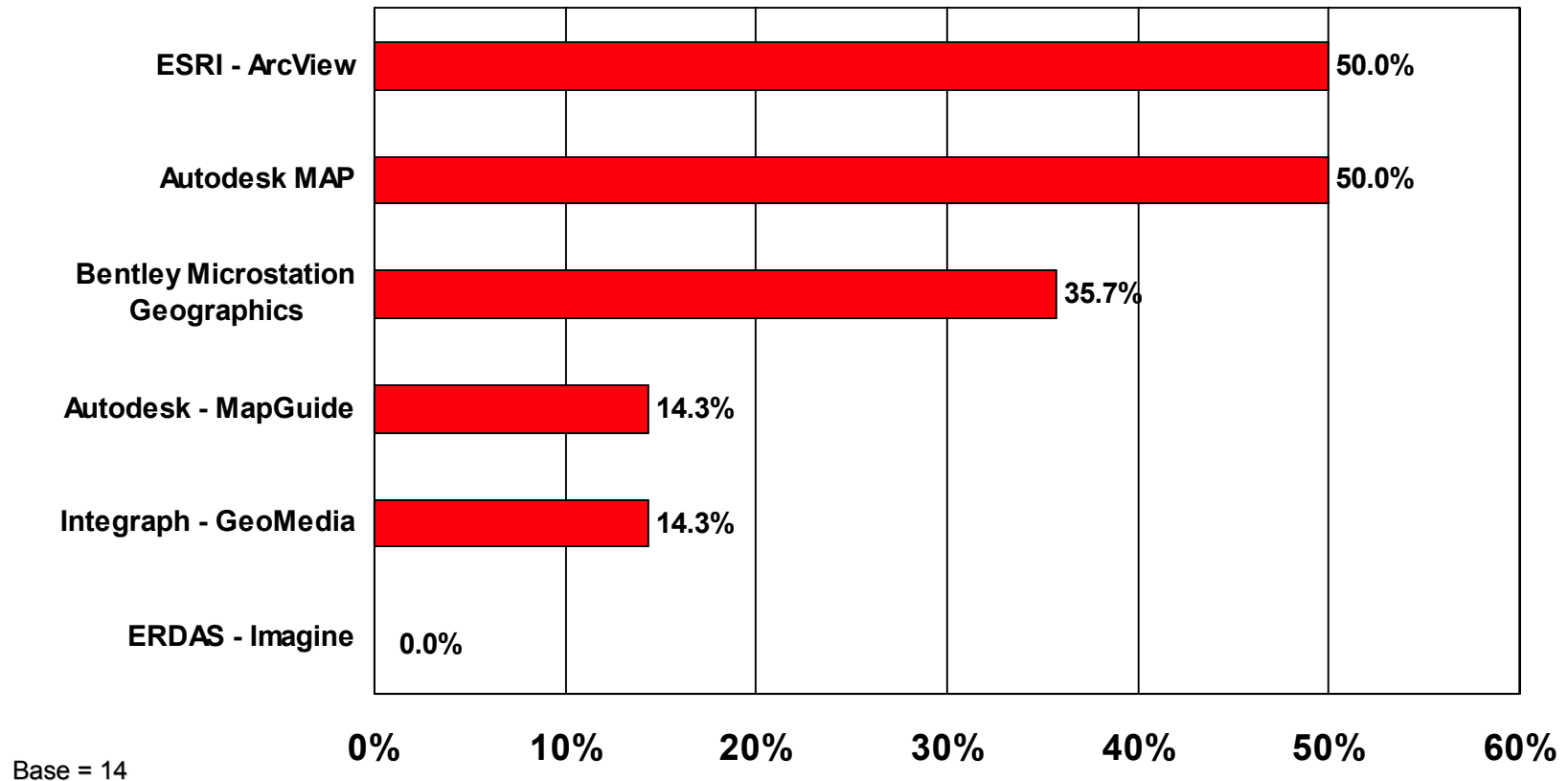
Which software applications are likely to be purchased by your firm in the next 12 months? *Civil Engineering*



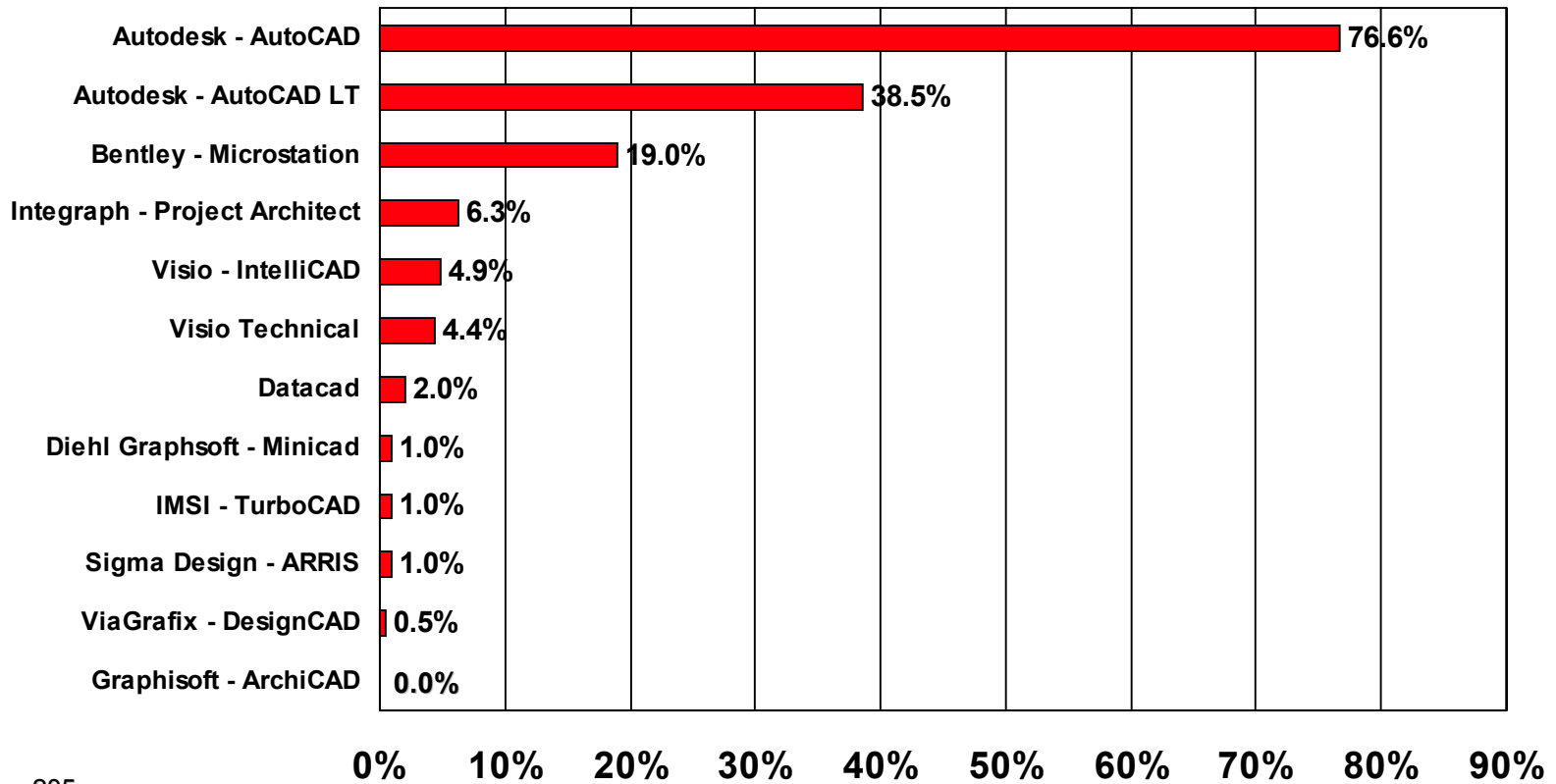
Which software applications are currently used within your firm? *GIS/Mapping*



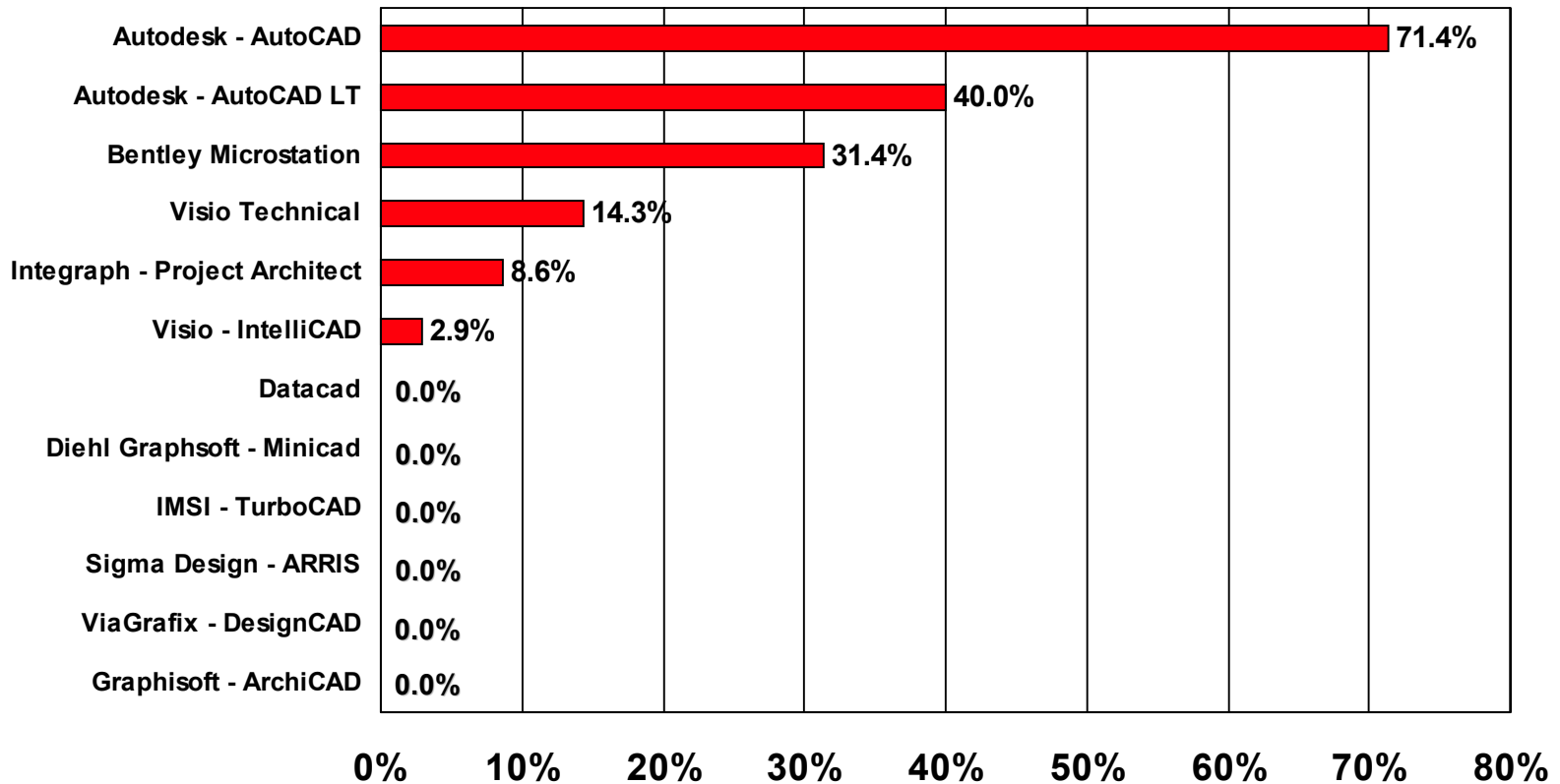
Which software applications are likely to be purchased by your firm in the next 12 months? *GIS/Mapping*



Which software applications are currently used within your firm? *Computer Aided Design/Drafting*

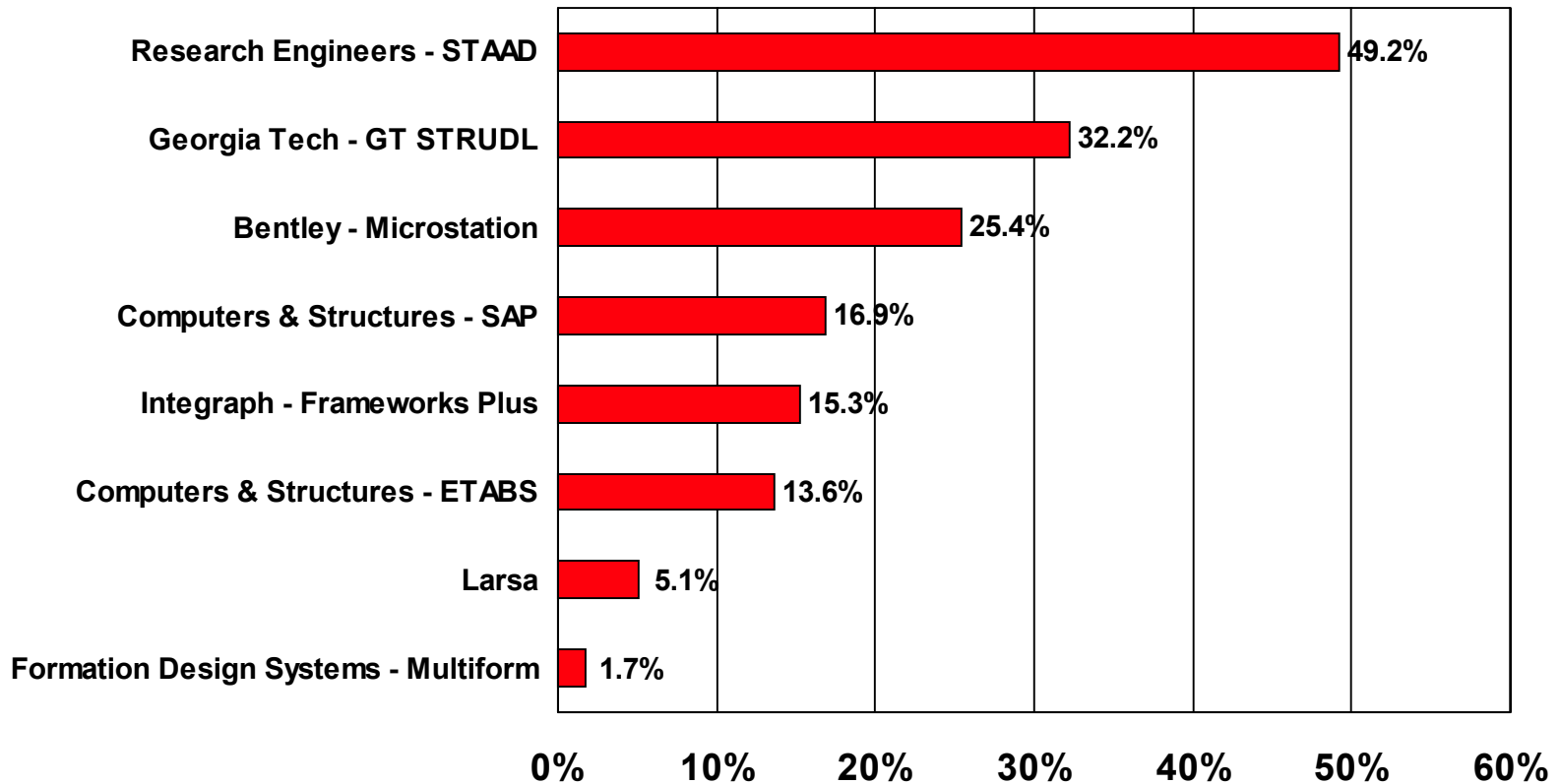


Which software applications are likely to be purchased by your firm in the next 12 months? *Computer Aided Design/Drafting*



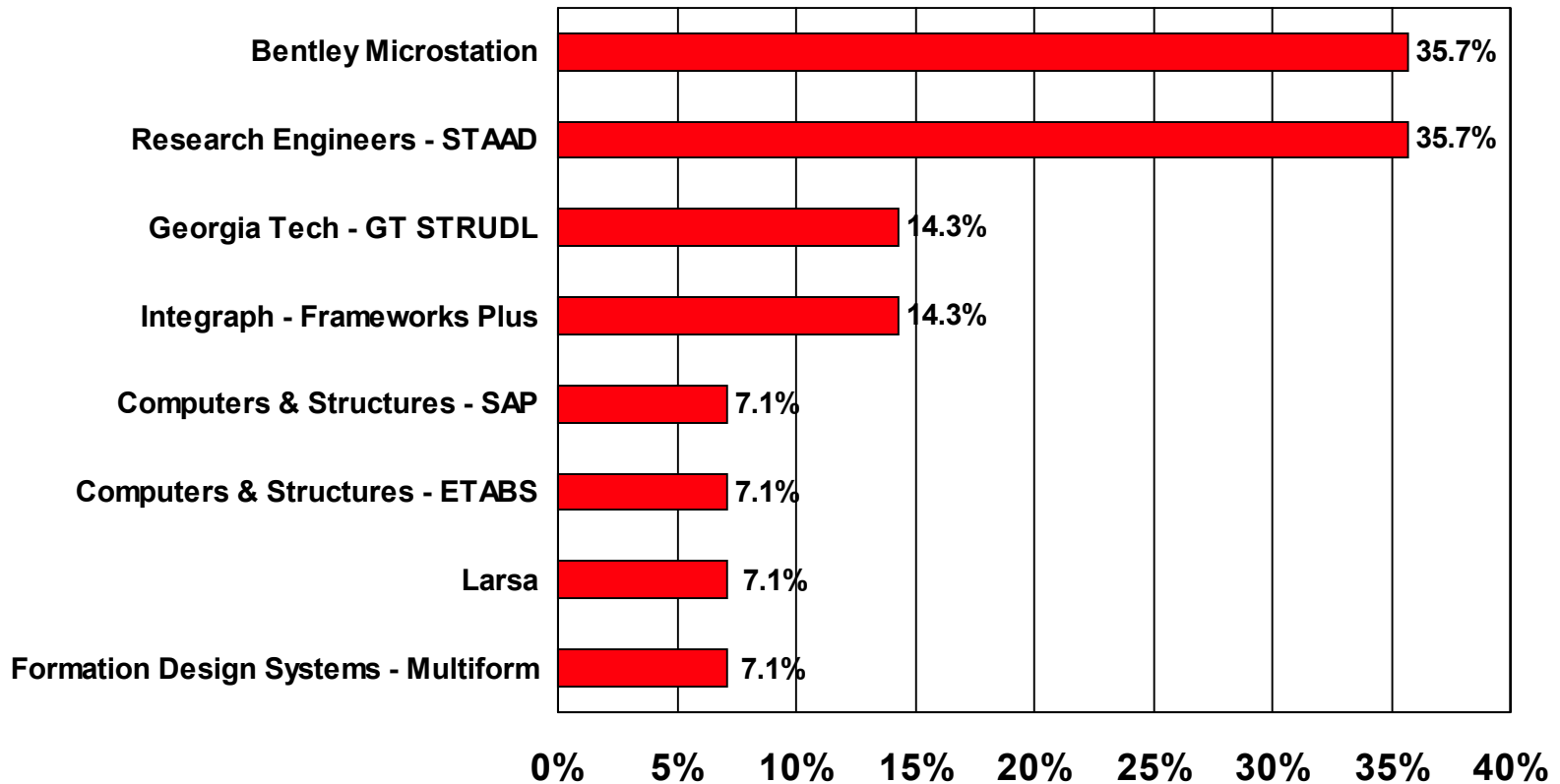
Base = 35

Which software applications are currently used by your firm? *Structural Engineering*



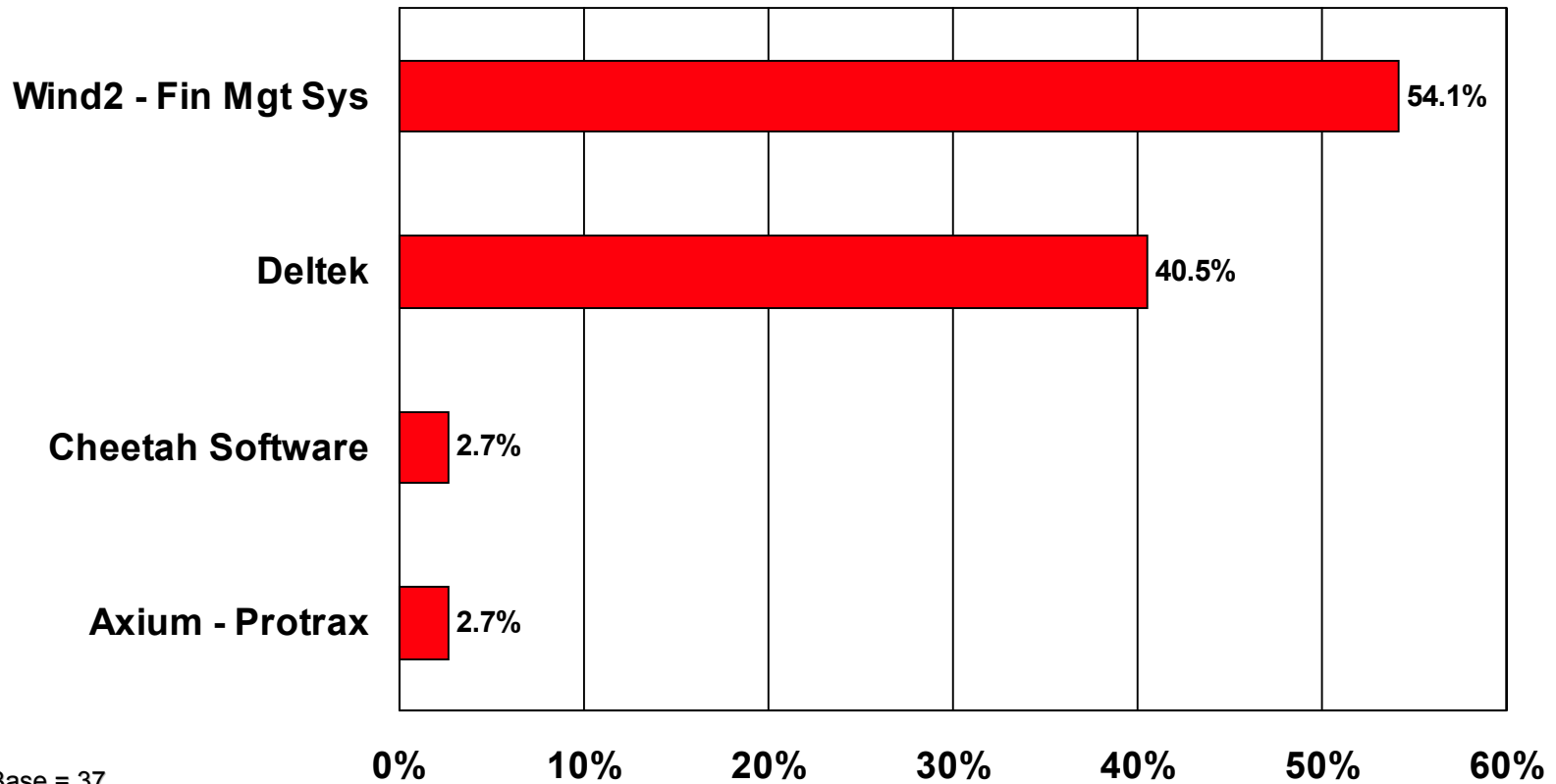
Base = 59

Which software applications are likely to be purchased by your firm in the next 12 months? *Structural Engineering*



Base = 14

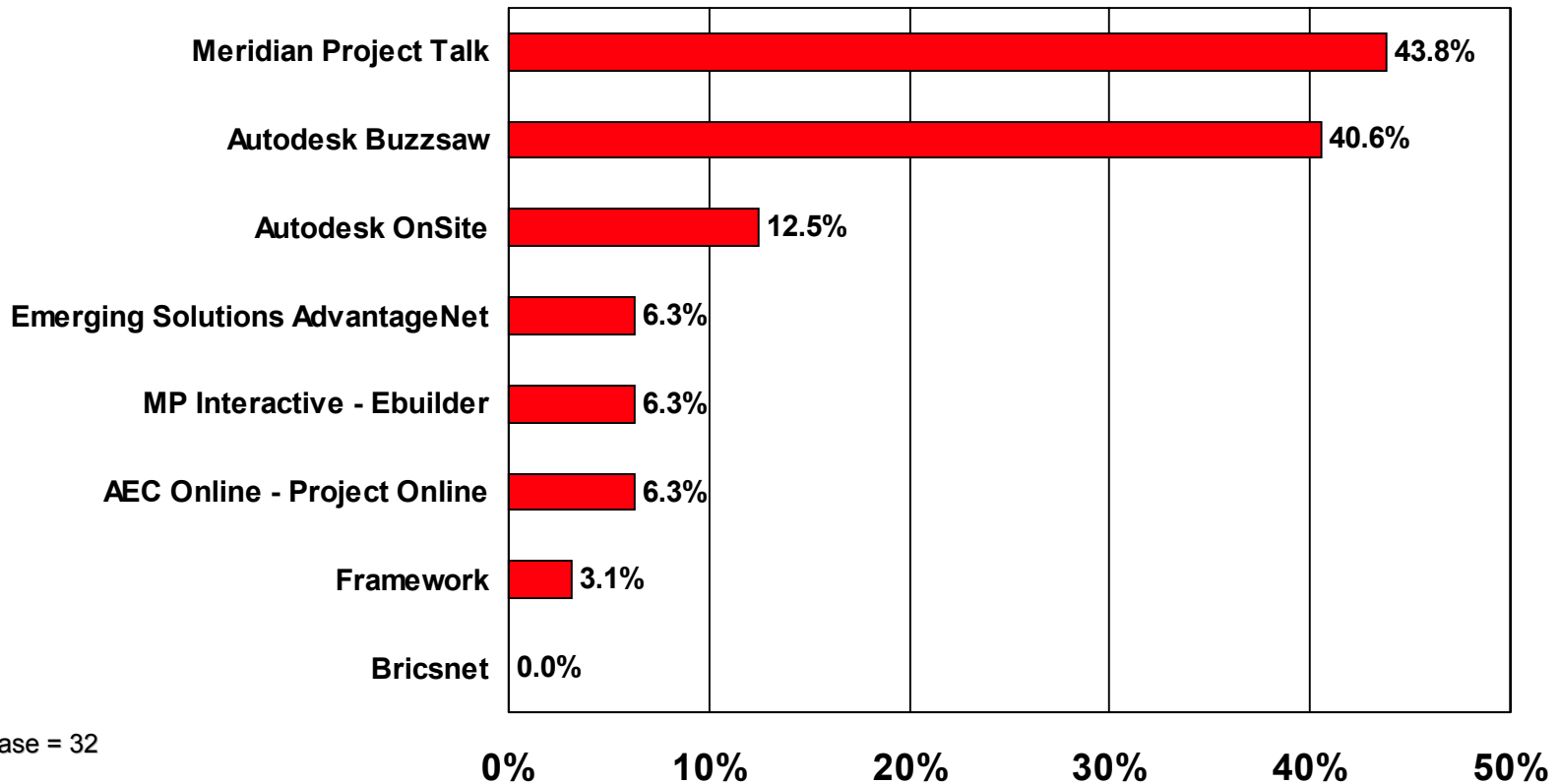
Which software applications are currently used within your firm? *Financial Services/Project Accounting*



Base = 37

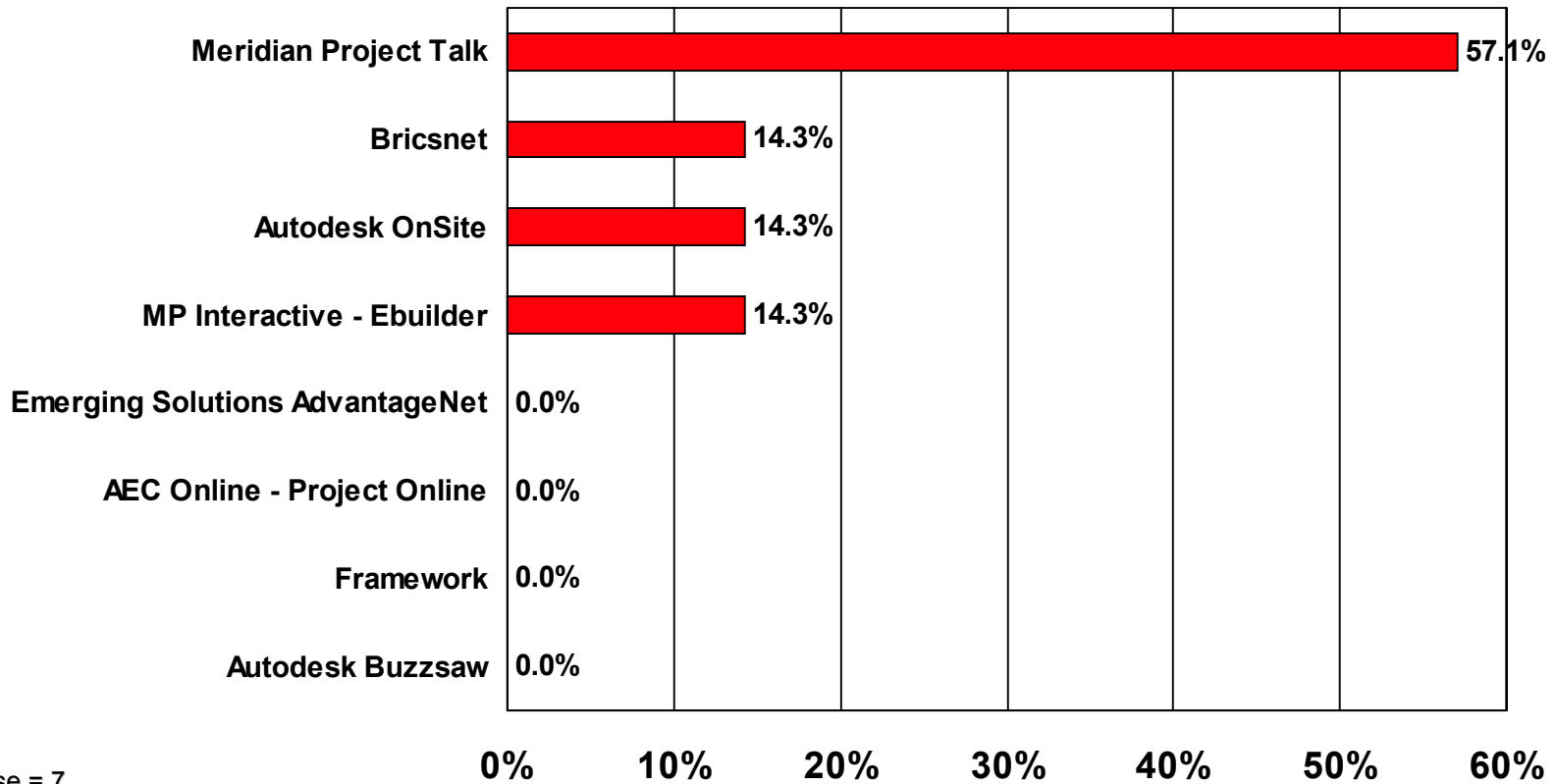
Which software applications are currently used within your firm?

Project Enabled Web Sites

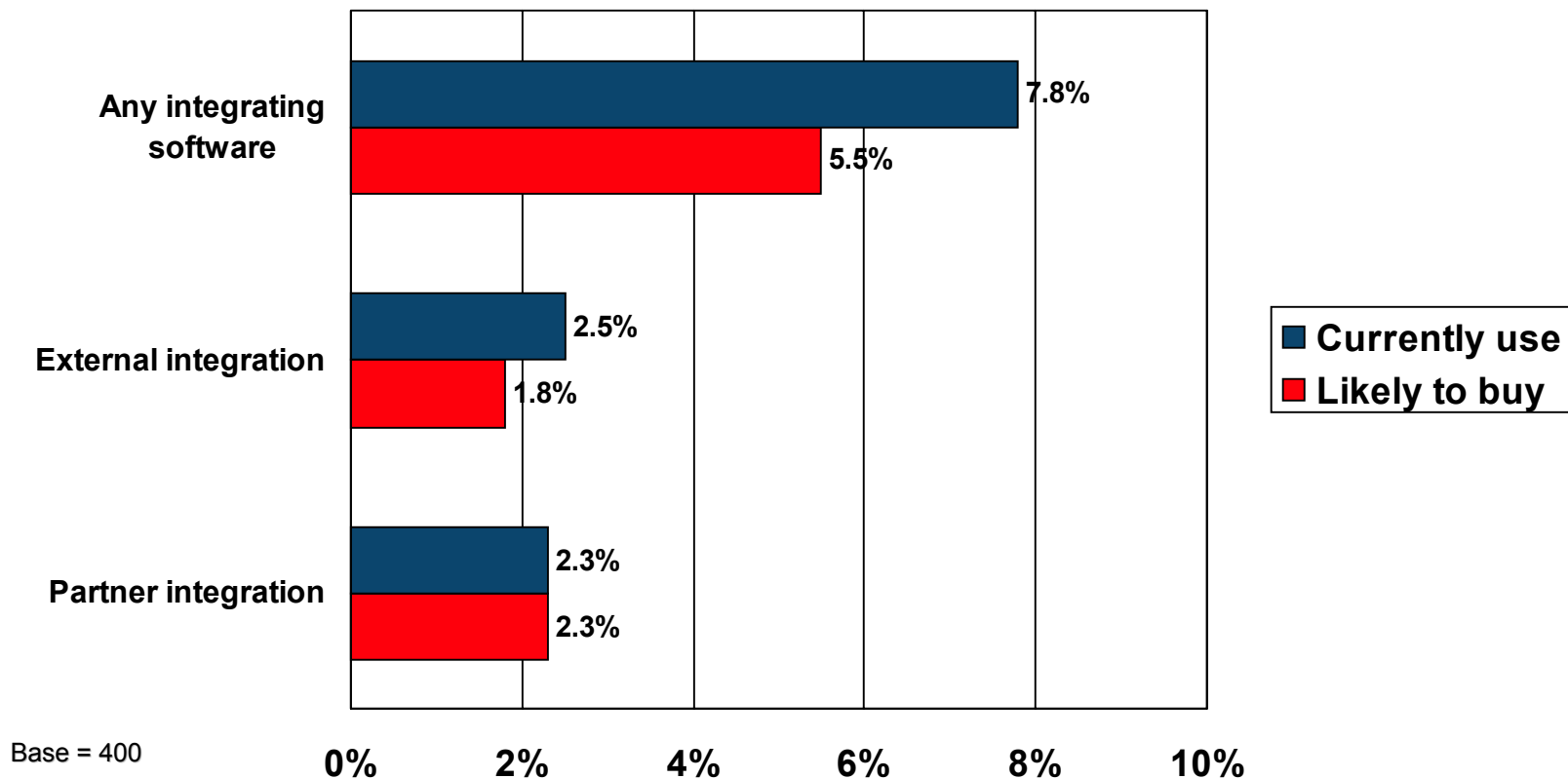


Which software applications are likely to be purchased by your firm in the next 12 months?

Project Enabled Web Sites



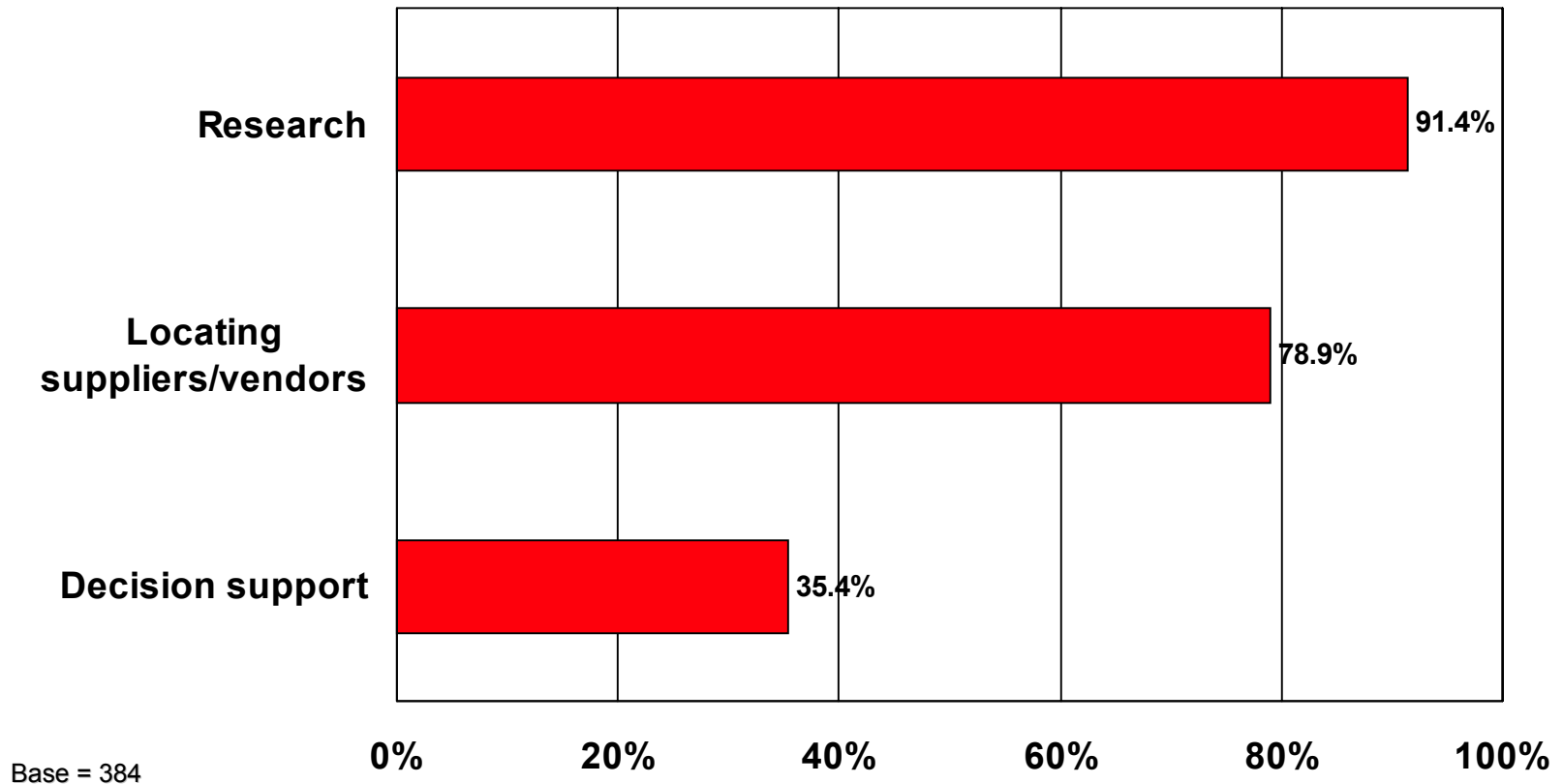
Is your firm currently using or likely to buy integrating software in the next 12 months?





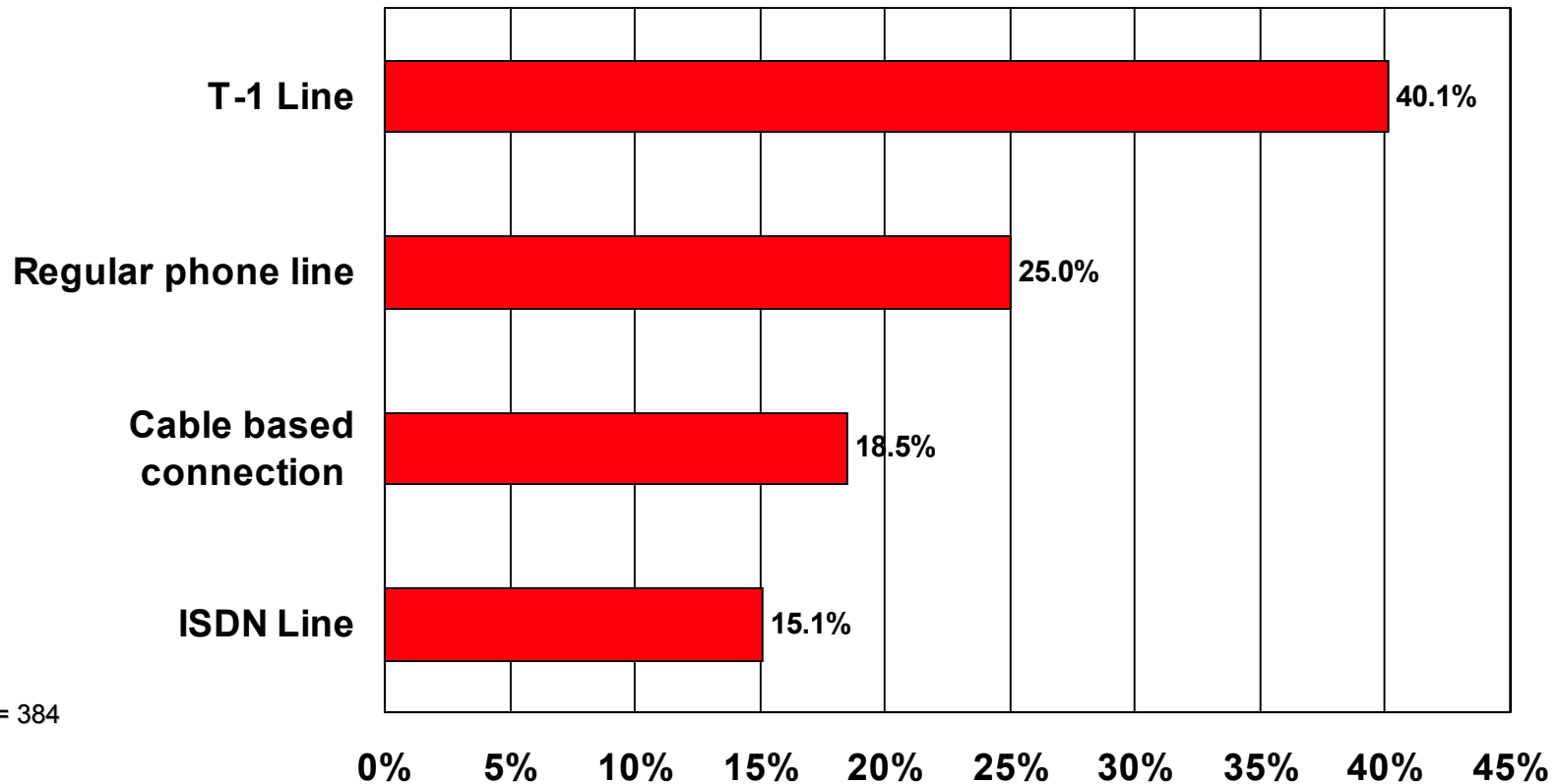
Use of the Internet and Web-Based Applications

What business purposes do you access the World Wide Web for at work?



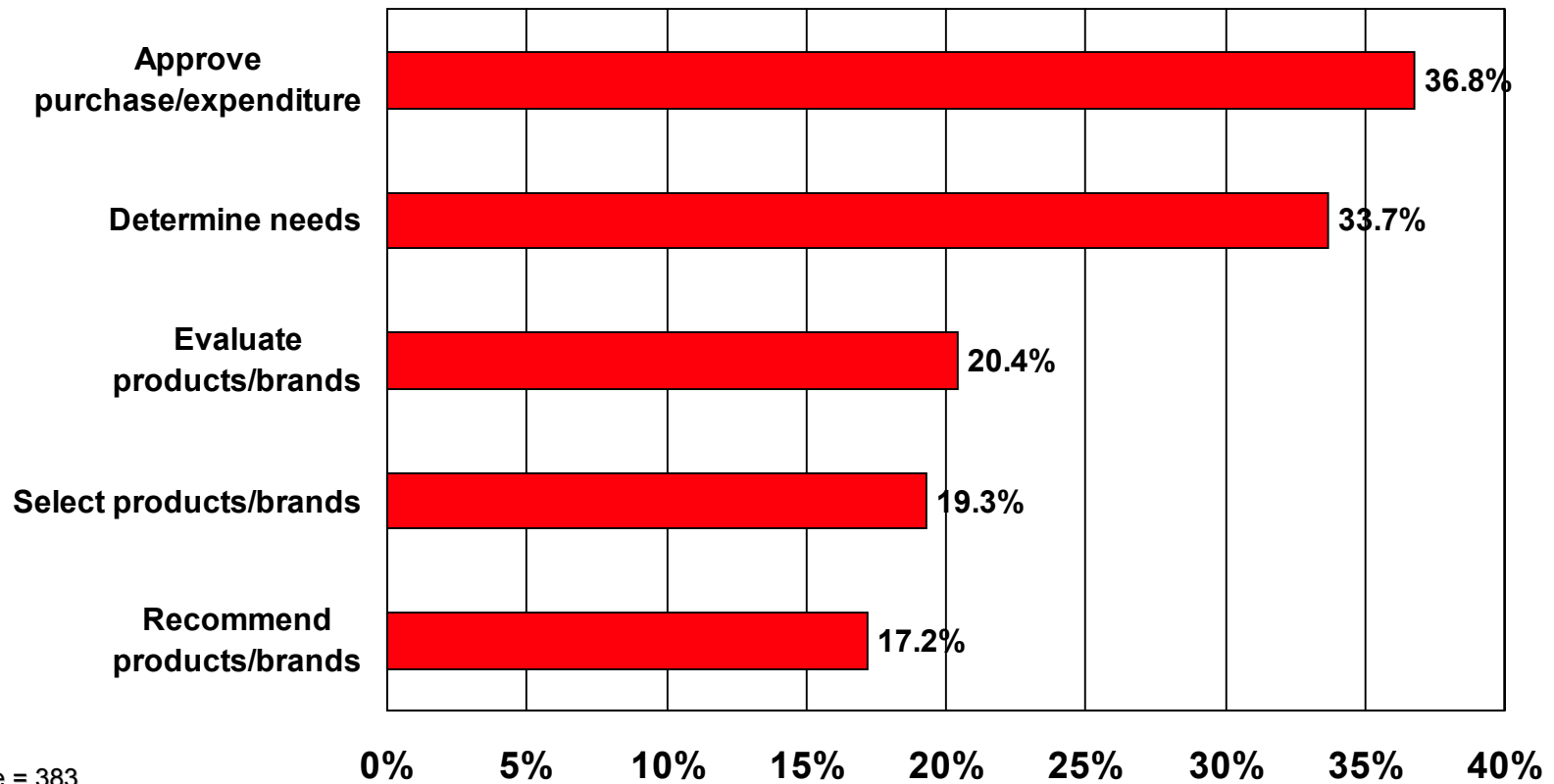
Subscribers access the Internet for business related purposes an average of 5.5 times per week.

What type of connection does your office currently have to the World Wide Web?



Base = 384

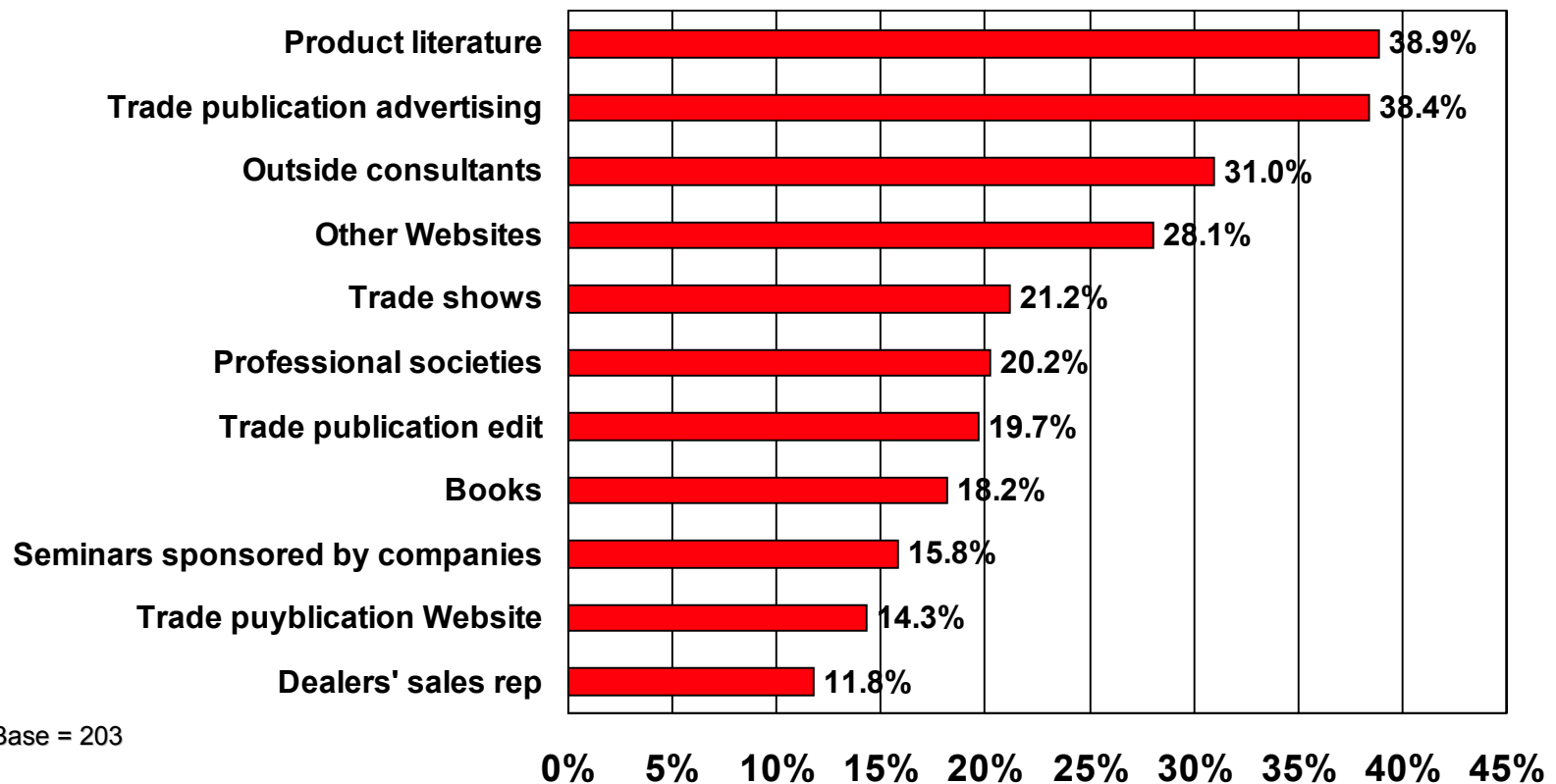
What is your involvement in your organization's purchase of web-based applications?



66% of respondents are involved in their organization's purchase of web-based applications.

What sources of information help you in making decisions about web-based applications?

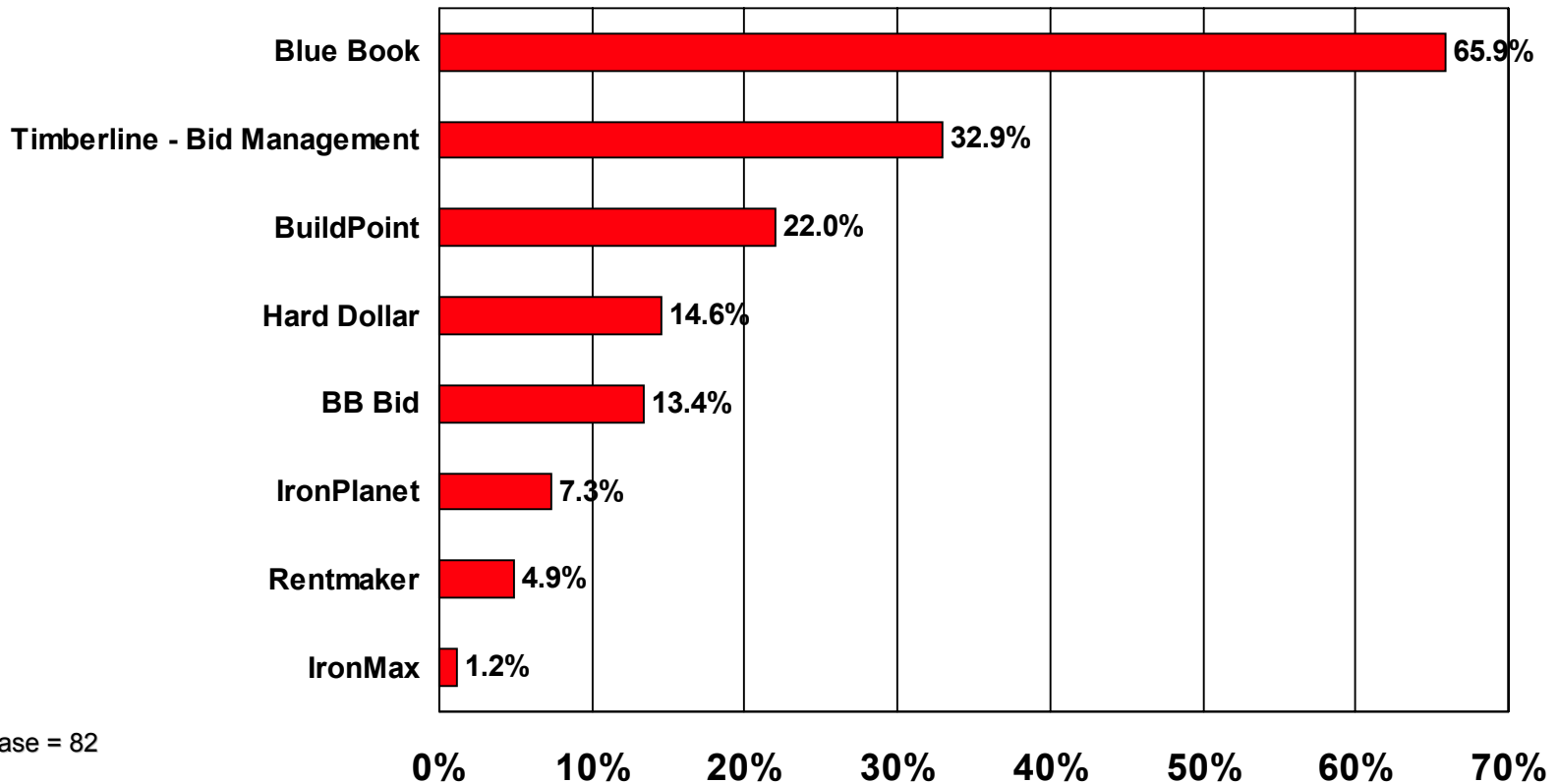
(Of those “Involved in purchase decisions”)



Which web-based applications are you familiar with?

E-Commerce/Procurement/Bid Gathering Web Sites

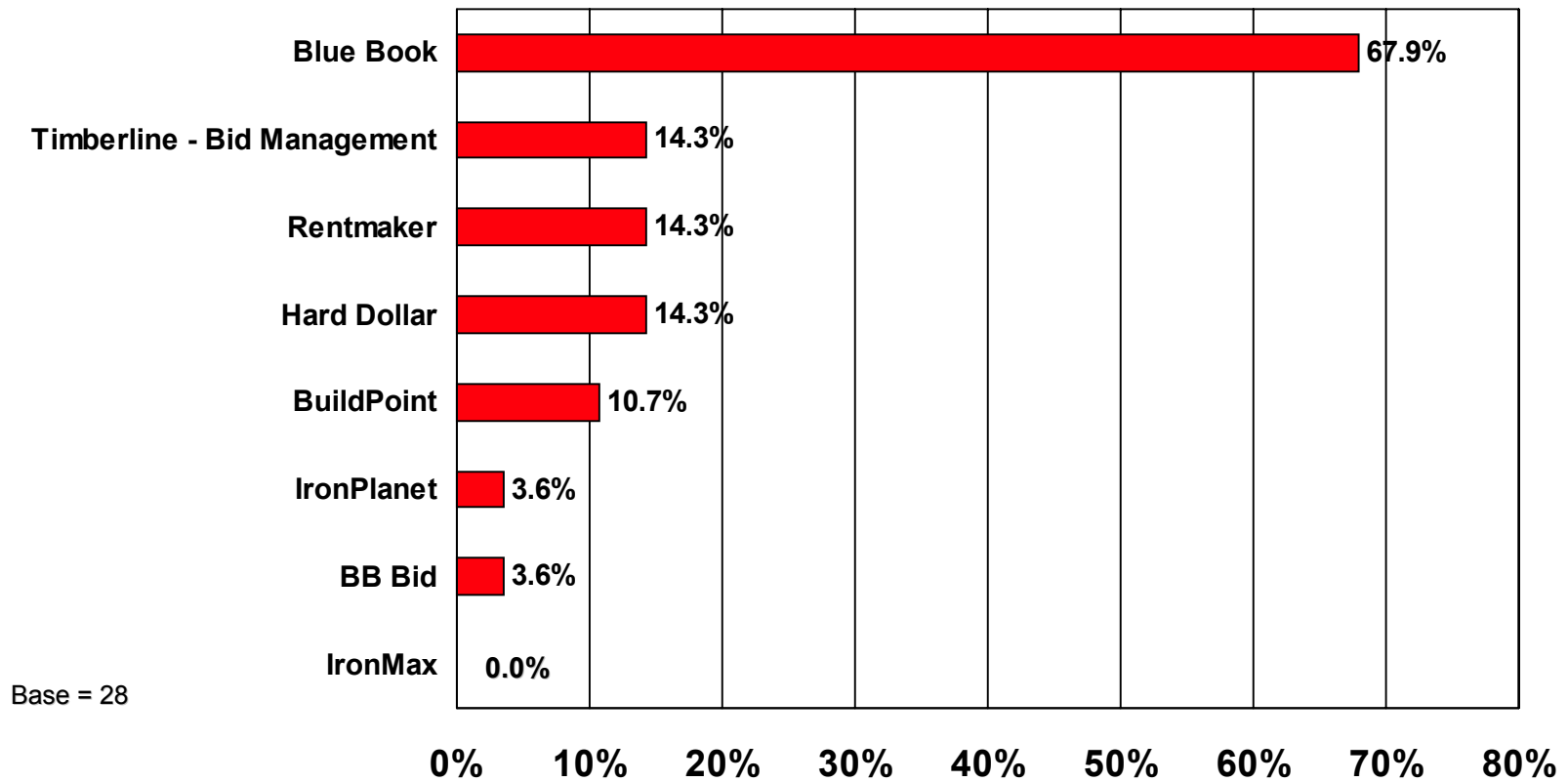
Of those "Familiar with any Web Site below"



Which web-based applications are currently used by your firm?

E-Commerce/Procurement/Bid Gathering Web Sites

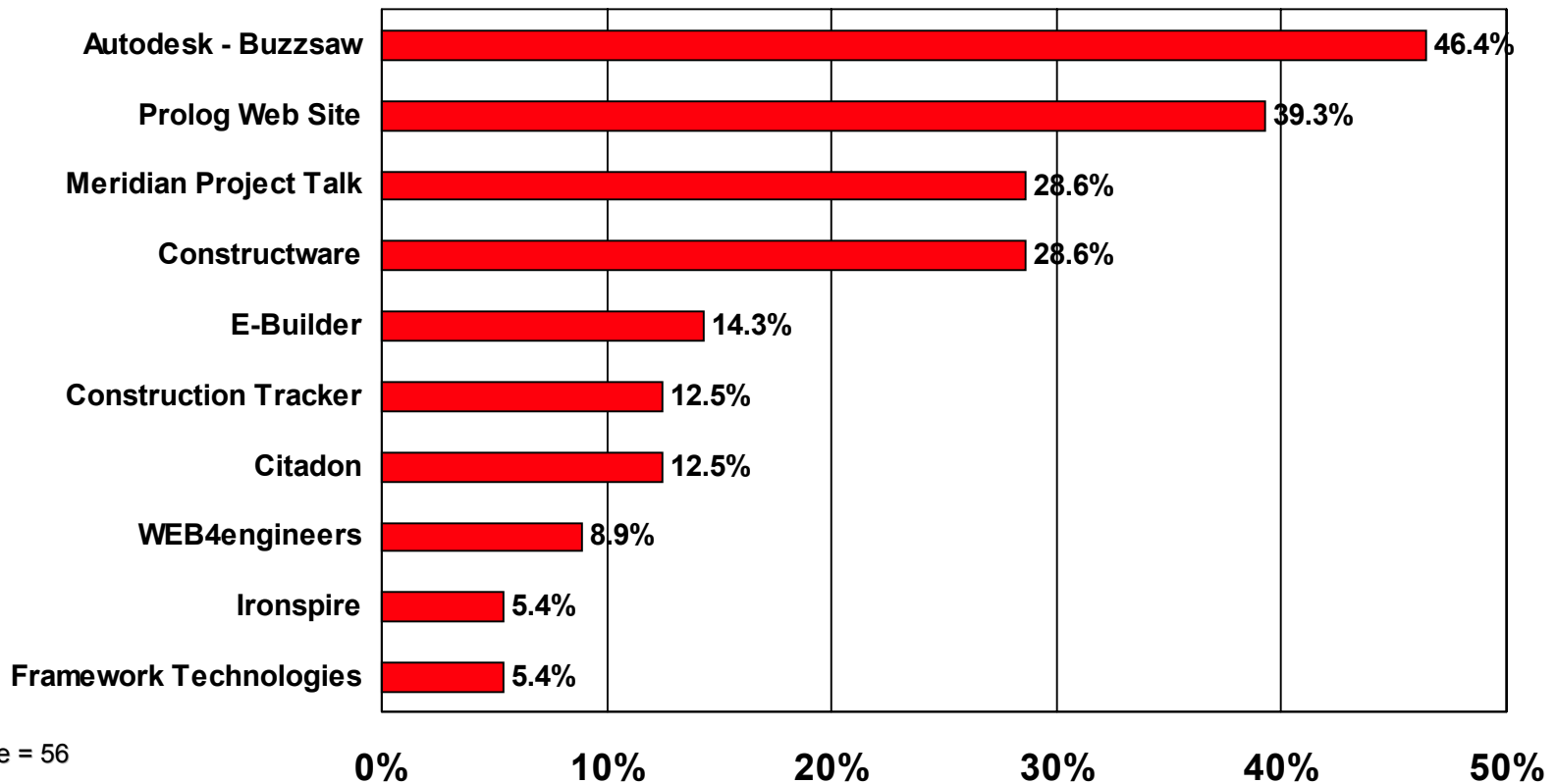
Of those who "Currently use any Web Site below"



Which web-based applications are you familiar with?

Internet Based Project Collaboration Services

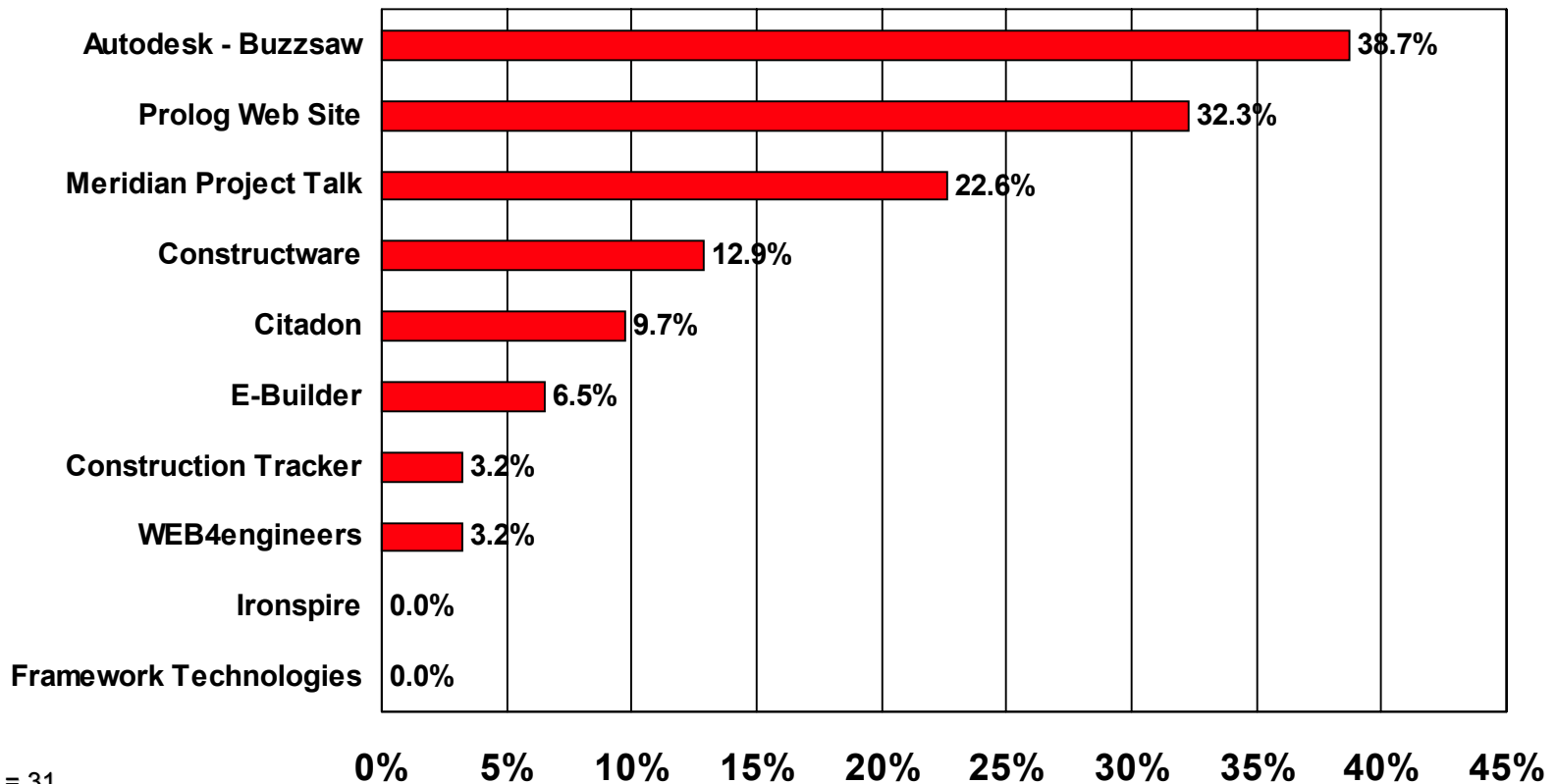
Of those "Familiar with any Web Site below"



Which web-based applications are currently used by your firm?

Internet Based Project Collaboration Services

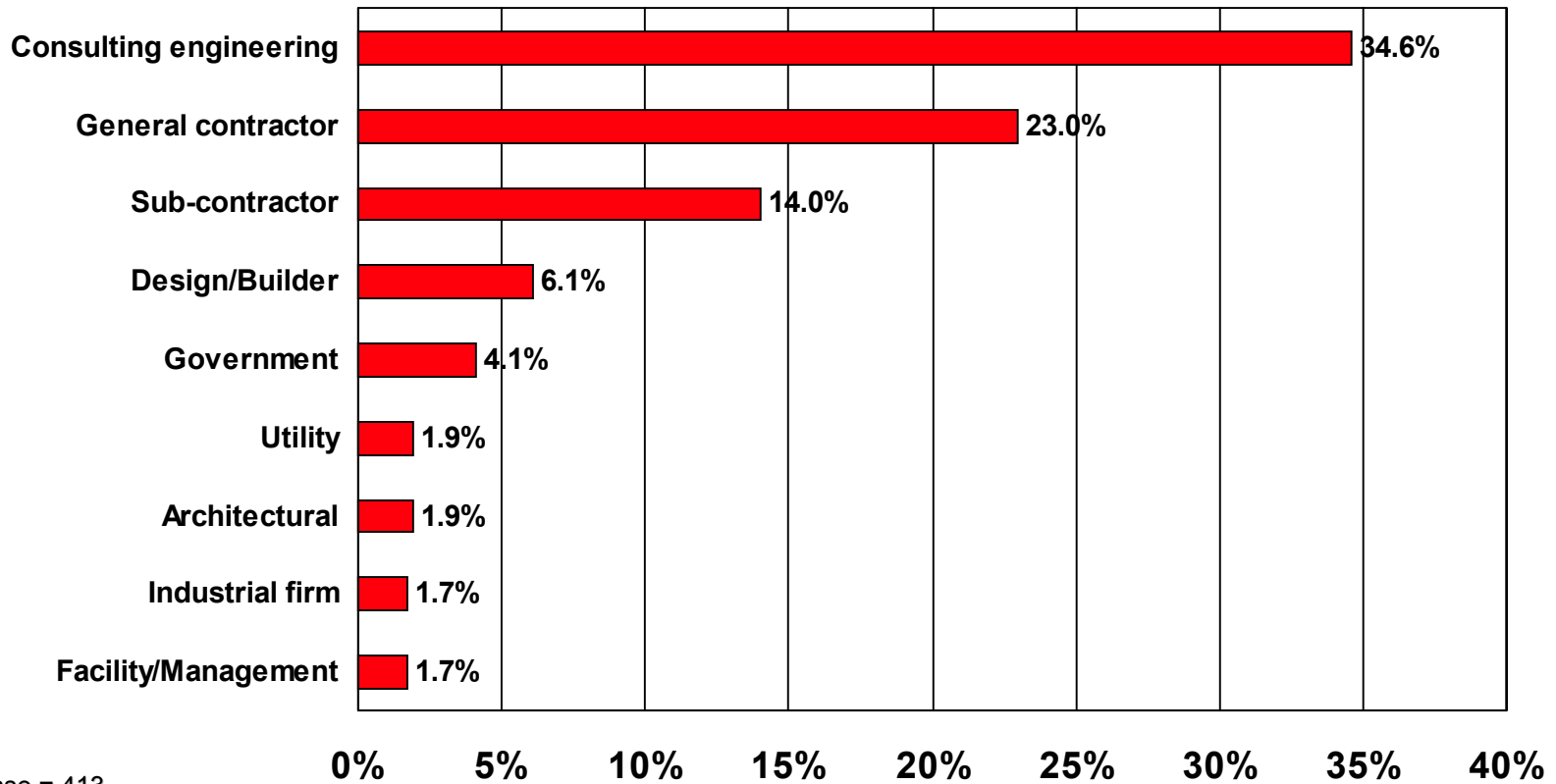
Of those who "Currently use any Web Site below"



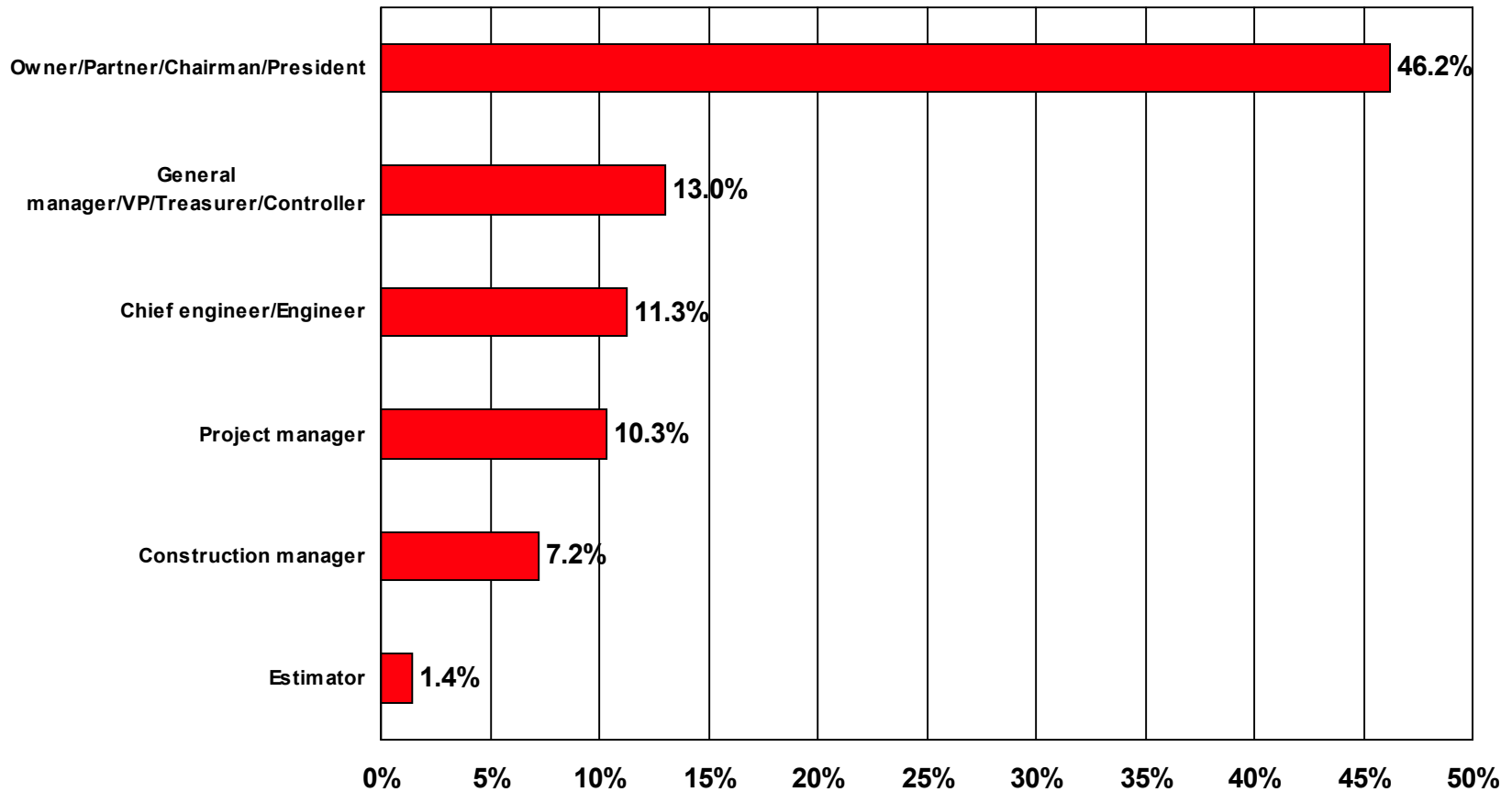


Demographics

Which classification best describes your firm/agency?



What is your title?



Base = 416

Size of Firms

Average firm size = 182 employees

**Average value of projects or total construction volume =
\$61.8 Million**

Average value of design billings = \$4.3 Million

Which of the following is your favorite publication and which do you find most useful?

