



CORNERSTONE™

REPORT

CSR004 – 3D IMAGING INDUSTRY

This report is intended to review the current state of the 3d Imaging industry based on responses and opinions from service providers and consumers.

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INTRODUCTION

Introduction

PRESIDENTS MESSAGE

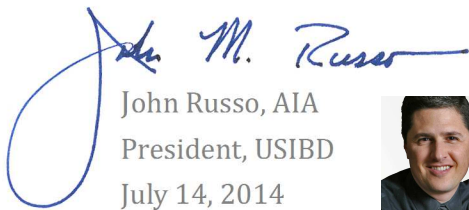
I am pleased to present to you the fourth issue of the USIBD's Cornerstone Report. This issue of the Cornerstone Report is an overview on the state of the industry. Building documentation is a distinct industry and is still in an early stage of development. As the various Stakeholders with an interest in building documentation come together and share their collective knowledge and experiences we all benefit. This is the purpose of the Cornerstone Report.

The first thing to note in this issue is the participation rate of individuals responding to this survey is the highest we've ever had. This is significant since it serves as evidence that this kind of information is important to the Stakeholders in our industry. I highly encourage you to share this report with those in your network with whom you feel might be interested. Increasing participation in these surveys will provide a clearer view of the things that affect our everyday lives.

This survey also revealed that respondents were participating from a wide variety of regions throughout the United States. Work currently seems to be spread evenly across the U.S. The overriding trend is that the industry is increasing its adoption of 3D imaging for building documentation purposes, although this seems to be concentrated more so in the preconstruction phase.

Respondents also indicated their hunger for more standards and real world case study data. This may stem from a general feeling that many service providers and publications are promoting unrealistic accuracies and effort levels to perform building documentation services.

We hope you will continue to participate in future Cornerstone Report surveys as well as invite your friends and colleagues to participate as well. On behalf of the USIBD's Board of Directors and the Technology Committee, we hope you will enjoy this issue of the USIBD'S Cornerstone Report.


John Russo, AIA
President, USIBD
July 14, 2014



INTERPRETATION OF DATA

Interpretation of Data

1) WHAT ARE WE FOCUSING ON?

- A minority of us now provide service for both new construction and renovation/asbuilt projects (34.5%), resulting in 65.5% focusing on serving one or the other. Out of those specializing in one area, 3% are in new construction compared to 11.5% last year and 97% stick with renovation work. The largest change is that 25% of us are participating in reverse engineering now, it was almost an empty field last year.



2) WHAT PROJECTS PAY?

- We're seeing a greater number of big project values this year. 20% of us are typically working on projects over \$100,000 USD, but the leading project range is still coming in between \$5,000 and \$25,000 with 37%.



INTERPRETATION OF DATA

3) HOW BIG ARE OUR CLIENTS?

- 3d imaging is being adopted by a wider range of client sizes this year, large companies (over 100 employees) accounted for 65% of the consumers last year but only 42% now. Medium sized companies (25-100 employees) are close behind with 36%.

4) HOW FAR FROM HOME DO WE WORK?

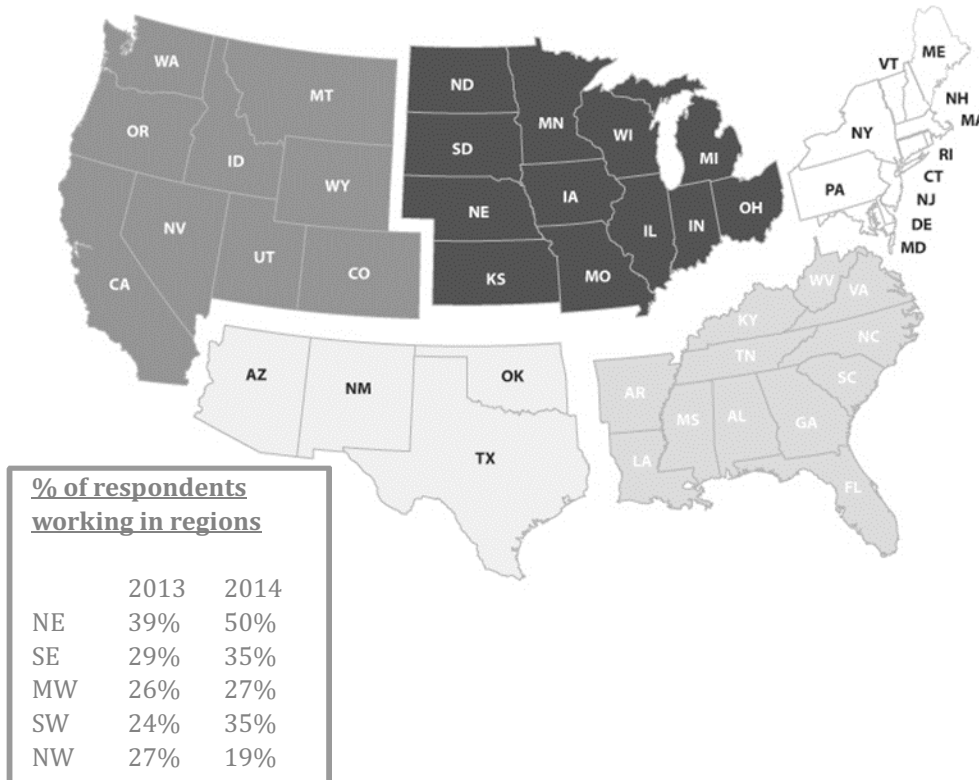
- We're reaching out for work a bit more this year. Last year we were regionalized in our search for clients, with most of us sticking to 1 – 2 of the regions. This year the majority of us are pursuing work in more than 3 regions.



INTERPRETATION OF DATA

5) WHERE IN THE U.S. IS THE TECHNOLOGY TAKING OFF?

- The Northeast is still ahead of the other regions when it comes to the 3d imaging business with almost 15% more respondents working on projects there than anywhere else (compared to 10% last year).



Do you feel alone with small contracts?

- Companies that primarily perform work under \$5,000 continue to be in the minority. Less than 8% of respondents regularly interacting with projects in that category last year with a slight reduction to 7% this year.



INTERPRETATION OF DATA

6) HOW OFTEN IS 3D IMAGING USED?

- Although adoption is increasing we still see the largest portion of our clients implementing it on less than 25% of their projects. There is a significant group of consumers rolling the technology out on over 75% of their projects though, almost 18% of us see our clients making this push (up from 10% last year).

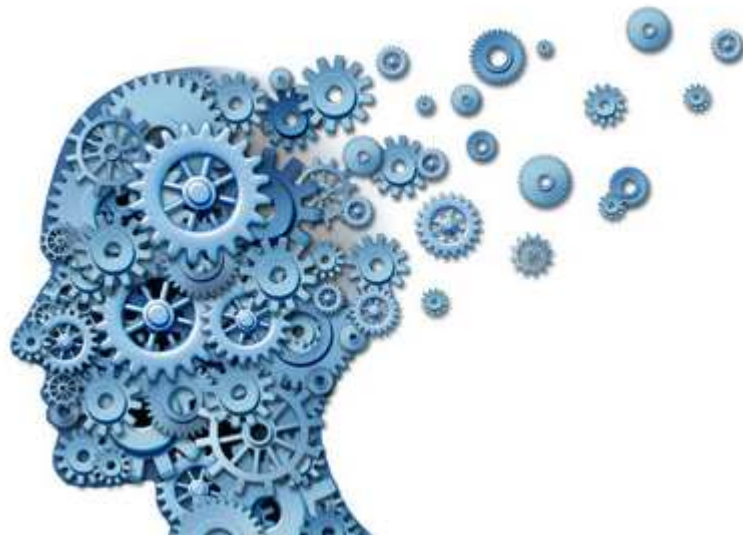
7) IS THE FUTURE LOOKING BRIGHT?

- We're seeing an increase in anticipated use on future projects. Last year 16.5% of us expected our clients to use 3d Imaging on the vast majority of their projects but this year that number is up to 26.5%.



8) WHERE ARE CLIENTS LEARNING ABOUT 3D IMAGING?

- There's been a significant shift over the last year in client awareness sources. In 2013 we saw almost half of the awareness coming from publications, 2014 is heavily based on peer interaction and provider efforts. Knowledge of 3d Imaging through publication accounts for less than 20% now.



9) ARE THEY SELF PERFORMING WORK?

- A very slow increase in self-performing has occurred over the last year but it's still far from the 'norm'. The biggest change has been in full adoption with the statistic increasing to 5% from 2% last year.

INTERPRETATION OF DATA

10) HOW SATISFIED OUR WE WITH THE EQUIPMENT MANUFACTURERS?

- Our satisfaction remains relatively unchanged with about 65% of us at least satisfied with the manufacturers but close to 20% of us wanting more.



11) WHEN ARE WE BEING ENGAGED?

- The ratios from last year are still holding, most engagement is occurring pre construction (80%) with an even showing for deployment both during and post construction.

12) WHERE ARE THE AREAS FOR IMPROVEMENT?

- There's an uncanny similarity in the responses when asked how much more value could the clients gain. The vast majority of us believe they could see around a 50% increase in value.



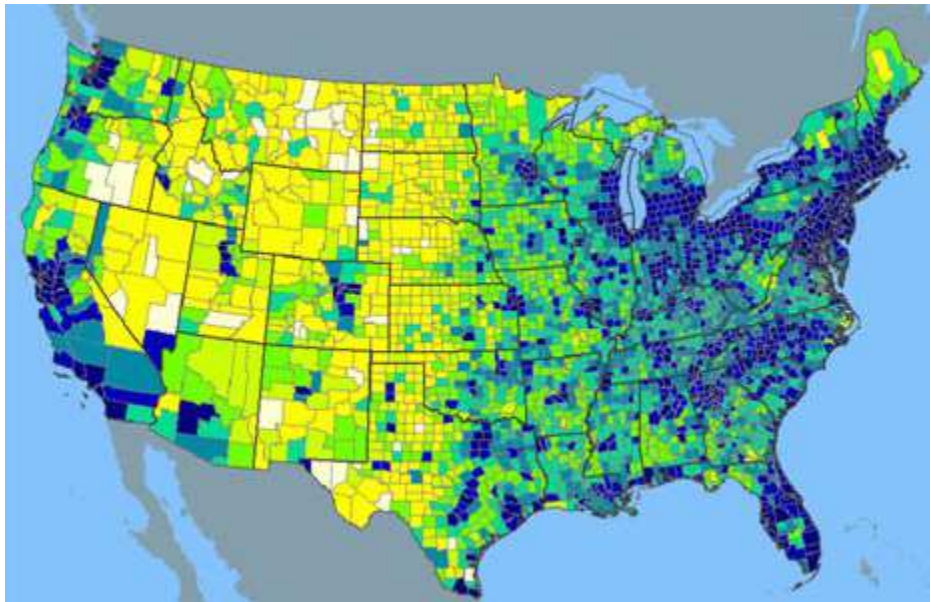
13) ARE THE CLIENTS SEEING 3D IMAGING AS SUCCESSFUL?

- Close to 75% of us believe the services are being successfully integrated, an interesting number considering that we also felt that value was fully being recognized.

INTERPRETATION OF DATA

14) WHERE ARE THE HIGHEST CONCENTRATIONS OF SERVICE PROVIDERS IN THE U.S.?

- Two U.S. regions are strongly represented with 26% of respondents based in the Northeast and 23% coming out of the Southwest. The Northwest showed the smallest percentage with just 7%. There's also great showing by international contributors to this report with almost 17%.




15) WHAT INFORMATION WOULD HELP US BETTER SERVER OUR CLIENTS?

- There were two reoccurring items that showed up in most of your comments, the desire for standards and case studies. By contributing to organizations like the USIBD, you will help facilitate these solutions. If you're not already engaged, please reach out using the contact information provided on the last page of this report.

CONTACT INFORMATION

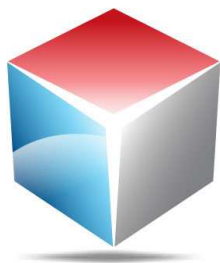
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