



2024 Profile

of the Electrical Contractor

**Electrical Contractors:
Their Ownership,
Purchase and Lease of
Testers, Multimeters,
Computers and Other
Electronic Devices**

*Special Report by Renaissance Research
& Consulting, New York, for ELECTRICAL
CONTRACTOR, January 2025*

**2024 “ELECTRICAL CONTRACTOR MAGAZINE PROFILE”
DATABASE REPORT**

ELECTRICAL CONTRACTORS:

**THEIR PURCHASE AND LEASE OF:
ELECTRICAL TESTERS/MULTIMETERS ETC.
LAN/DATACOM/OTHER LOW VOLTAGE
THERMAL IMAGING
LABELING/IDENTIFICATION**

**SMART/MOBILE/CELL PHONES/TWO-WAY RADIOS/PUSH-TO-TALK
TABLETS/PORTABLE READING DEVICES**

**DRONES
3D SCANNERS
3D PRINTERS
ROBOTS**

**THEIR OWNERSHIP OF COMPUTERS AND ELECTRONIC
DEVICES
SOFTWARE USAGE**

INCLUDING ESTIMATES BASED ON THE 2022 COUNTY BUSINESS PATTERNS

**A SPECIAL REPORT PREPARED BY
RENAISSANCE RESEARCH & CONSULTING, INC.**

**FOR:
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WASHINGTON, DC 20004**

JANUARY 2025

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KEY FINDINGS

This report is volume one of a two-volume report covering 28 different types of tools and equipment as well as use of electronic devices and software. Pages 1 through 4, the Methodology and pages 8 through 16 are common to both reports.

PURCHASE AND RENTAL/LEASE BEHAVIOR OVERVIEW:

Tools and Equipment **Purchased** in 2023

Nine in ten electrical contractors (92%) reported purchasing the 28 tools and equipment included in this survey in 2023, statistically unchanged from two years earlier. Further, higher percentages made purchases in *multiple* categories—2+, 4+ and 6+ compared with two years earlier, suggesting strength and momentum in this category.

- In general, larger companies—those with 10+ employees and/or companies that work primarily on CII projects—tend to be more likely to make purchases in multiple categories.

In 2023, Hand tools and Power tools continue to top the list at around 80%+ each, followed distantly by Electrical testers, multimeters, Measuring tools (including digital), Fishing tools and Personal protective equipment, including apparel and accessories, at around 68% to 60%.

About 5 in 10 electrical contracting firms reported a 2023 purchase of: Phones (smart/mobile/cell or two-way radios/push to talk) and Labeling/identification (cable/panel).

About four in 10 electrical contracting firms reported a 2023 purchase of: Pipe threaders, benders, cutters, Job-site safety equipment, Tablets or portable reading devices and and Temporary job-site lighting.

Between about 30% and 20% reported a 2023 purchase of Temporary power, Cable pullers, Portable generators, LAN, datacom, other low-voltage, and Thermal imaging.

18% to 12% of electrical contracting firms reported a 2023 purchase of: Wearable technology, Trailers (to haul equipment/materials), Aerial lifts/scaffolding and Digging/HDD/boring equipment.

10% or less of electrical contracting firms reported a 2023 purchase of Surveying tools, Drones, Mobile office space (construction trailers), 3D scanners, 3D printers, Cranes, Robots.

On the next page, there is a table showing the percentage of firms purchasing each of the 28 tools and equipment included in this survey. As shown on the following page, for many of the items, purchasing is higher among larger firms and/or firms whose revenue comes primarily from CII projects. (Note that there is a great deal of overlap between larger firms and firms working primarily on CII projects.)

PURCHASE OF TOOLS AND EQUIPMENT Trended

V3, Q 14A, T74 1(Trend p.211)	In 2023		In 2021		In 2019		In 2017		In 2015
	Total		Total		Total		Total		Total
Bolded numbers denote and arrows significant differences at the 90% level of confidence	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
“Any” Purchase ...	92	=	87	=	84	=	81	>	79
Hand tools	86	>	74	=	74	=	70	=	70
Power tools	82	=	75	=	68	=	66	=	70
Electrical testers, multimeters, etc.	68	>	53	=	55	>	45	=	46
Measuring tools (including digital) (first asked in 2020 Profile Study)	66	>	52	=	49		N/A		N/A
Fishing tools (first asked in 2020 Profile Study)	61	>	47	=	46		N/A		N/A
Personal protective equipment, including apparel and accessories	60	>	44	=	43	=	42	>	31
Phones: smart/mobile/cell or two-way radios/push-to-talk	55	=	47	=	43	=	37	=	37
Labeling/identification (cable/panel)	54	>	40	=	36	=	34	>	22
Pipe Threaders, benders, cutters	41	=	36	=	35	=	28	>	22
Job-site safety equipment	40	=	35	=	34	=	28	=	26
Tablets or portable reading devices	39	>	27	=	31	=	24	>	16
Temporary job-site lighting (first asked in 2016)	35	>	23	=	26	=	23	>	15
Temporary power (first asked in 2022)	32	=	26		NA		NA		NA
Cable pullers (first asked in 2014 Profile Study)	31	=	24	=	25	=	19	>	10
Portable generators (first asked in 2016 Profile Study)	29	>	16	=	19	=	16	=	19
LAN, datacom, other low-voltage	25	=	25	=	22	>	14	>	9
Thermal imaging (first asked in 2014)	22	=	19	=	12	=	10	=	8
Wearable technology (first asked in 2022)	18	=	14		NA		NA		NA
Trailers (to haul equipment/materials) (first asked in 2016)	16	=	18	=	17	=	12	=	9
Aerial lifts/scaffolding	13	=	10	=	11	>	6	<	10
Digging/HDD/boring equipment	12	>	5	=	9	>	4	=	7
Surveying tools (first asked in 2022)	10	=	14		NA		NA		NA
Drones (first asked in 2018 Profile Study)	8	=	7	=	5	>	2		N/A
Mobile office space (construction trailers) (first asked in 2016 Profile Study)	7	=	3	=	5	=	3	=	4
3D scanner (first asked in 2018 Profile Study)	4	=	7	=	5	=	2		N/A
3D printer (first asked in 2020 Profile Study)	3	=	8	=	4		N/A		N/A
Cranes (first asked in 2016 Profile Study)	3	=	2	=	3	=	1		2
Robots (first asked in 2022)	1	=	3		NA		NA		NA

This table shows where purchases are statistically significantly higher by company size and/or by the firm’s primary source of revenue—residential or CII.

The exact numbers are shown in the Detailed Findings. This table is meant to show the broad patterns that we observed.

PURCHASE OF TOOLS AND EQUIPMENT In 2023							
V3, Q 14A, T74 1(Trend p.211)	Total	Number of Employees		Primary Type of Work			
		1-9	10+	Res		CII	
Bolded numbers denote and arrows significant differences at the 90% level of confidence	(158)	(89)	(68)*	(64)*		(76)	
	%						
“Any” Purchase ...	92		<		=		
Hand tools	86		=		=		
Power tools	82		<		=		
Electrical testers, multimeters, etc.	68		<		<		
Measuring tools (including digital) (first asked in 2020 Profile Study)	66		<		<		
Fishing tools (first asked in 2020 Profile Study)	61		<		<		
Personal protective equipment, including apparel and accessories	60		<		<		
Phones: smart/mobile/cell or two-way radios/push-to-talk	55		<		<		
Labeling/identification (cable/panel)	54		<		<		
Pipe Threaders, benders, cutters	41		<		<		
Job-site safety equipment	40		<		<		
Tablets or portable reading devices	39		<		<		
Temporary job-site lighting (first asked in 2016)	35		<		<		
Temporary power (first asked in 2022)	32		<		<		
Cable pullers (first asked in 2014 Profile Study)	31		<		<		
Portable generators (first asked in 2016 Profile Study)	29		<		<		
LAN, datacom, other low-voltage	25		<		<		
Thermal imaging (first asked in 2014)	22		<		<		
Wearable technology (first asked in 2022)	18		=		=		
Trailers (to haul equipment/materials) (first asked in 2016)	16		<		<		
Aerial lifts/scaffolding	13		<		<		
Digging/HDD/boring equipment	12		=		=		
Surveying tools (first asked in 2022)	10		<		<		
Drones (first asked in 2018 Profile Study)	8		<		<		
Mobile office space (construction trailers) (first asked in 2016 Profile Study)	7		<		<		
3D scanner (first asked in 2018 Profile Study)	4		=		=		
3D printer (first asked in 2020 Profile Study)	3		=		=		
Cranes (first asked in 2016 Profile Study)	3		<		<		
Robots (first asked in 2022)	1	=	=		=		

*Caution—small base

< or > indicates a statistically significant difference in the direction of the caret

Tools and Equipment Rented/Leased in 2023

In 2023, as was the case in 2021, 2019 and in 2017, about six in ten electrical contractors (58%) rented/leased equipment. Note that in 2015 and 2013, (not shown), the rental/lease rate was substantially and significantly lower—in the 37% to 40% range.

Nevertheless, as has been the case in recent Profile studies, fewer electrical contractors continue to obtain tools and equipment through rental/lease (58%) than through outright purchase (92%).

Construction Site Equipment

Construction Site Equipment is one of the few categories where some equipment is more likely to be obtained through *rental/lease* than through *purchase*. In fact, far more electrical contracting firms continue to obtain Aerial lifts/scaffolding, Digging/HDD/boring equipment, and Cranes and Mobile office space (trailers) through *rental/lease* than through *purchase*.

- Trailers to haul equipment are about equally likely to be obtained through Rental/lease or by purchase.
- In contrast, Personal protective equipment, Temporary power, Job-site safety equipment, Temporary job-site lighting and Portable generators are far more likely to be purchased rather than rented/leased.

NB: Bolding for emphasis; stat testing doesn't make sense because the sample that rented/leased overlaps with the sample that made purchases.

2023 Rental/Lease to Purchase Comparison		
	Rental/Lease	Purchase
	2023	2023
	(158)	(158)
	%	%
<u>“Any” Purchase/Lease ...</u>	<u>58</u>	<u>92</u>
Aerial lifts/scaffolding	46	13
Digging/HDD/boring equipment	33	12
Cranes	24	3
Mobile office space (trailers)	21	7
Trailers (to haul equipment/materials)	14	16
Personal protective equipment, including apparel and accessories	1.3	60
Temporary power	6	32
Job-site safety equipment	8	40
Temporary job-site lighting	8	35
Portable generators	12	29

- 44% of the electrical contractors surveyed rent/lease in multiple (2+ categories). As was the case regarding purchasing behavior, larger firms and/or those whose revenue comes primarily from CII projects tend to be more likely to rent/lease in multiple categories.

In this report, note that the Profile is conducted in even years (2024) and reports on behaviour in the full previous year (2023).

KEY FINDINGS: Ownership and Use of Computers and Electronic Devices

Certain questions in the 2024 Profile Survey were given to only a part of the sample in order to keep the overall survey shorter and more manageable. The findings in this section are based on a different set of respondents (those in V8) rather than those who answered the preceding questions on Tools and Equipment purchase (those in V3).

99% of respondents reported they that they or their firm uses/owns one or more of the 17 types of computers and electronic devices measured in this survey, statistically unchanged from 2021.

Ownership of phones and computers are on an approximate par, with 98% of survey participants reporting usage or ownership of Computers—Desktop/laptop/tablets—while 92% reported use or ownership of Phones (Smart phone/ Mobile phones/Two-way radios/Push-to-talk phones).

- Computers in total—Desktop/laptop/tablets—are statistically unchanged compared with two years ago.
- **Use or ownership of phones** *overall* posted a statistically significant **decrease** compared to two years ago. This decrease is probably due to a non-significant decrease in ownership of Smart phones (the largest component of this category) between 2022 and 2024.

However, at the same time, use/ownership of non-smart or non-multifunctional phones posted a statistically significant **increase** between 2022 to 2024 so that Smart phones are now a smaller ratio of the total category. That is, the ratio between Smartphones and phones that are not smart or multifunctional went from a ratio of about 5 to 1 (94% vs. 18%) to a ratio of about 3 to 1 (91% to 28%). It would be interesting to do research on this topic to determine why this is the case.

54% of electrical contractors are considering adding computers and/or electronic devices in the next 12 months.

Overall, 22% of the electrical contractors surveyed said that they are considering a purchase of one or more of these “New Technology” devices: Drones, 11%, (up significantly from 3% two years ago), Thermal imaging cameras (10%, unchanged from two years earlier) and about 5% each for Wearable technology, a 3D scanner or a 3D printer (all unchanged from two years earlier) 4% are considering the purchase of a VR/AR headset or hardhat.

While these numbers are still small, we will be watching their progress and expect them to increase, perhaps even dramatically over time as has already happened in the case of Drones.

In the more mature categories of Computers and Phones, 45% of those surveyed are considering the purchase of a Desktop, Laptop and/or Tablet, as a broad category. 28% are considering the purchase of one or more type of Phone or Two-way radio/ Push-to-talk phone.

As we noted two and four years ago, the wide array of computers and electronic devices that electrical contractors are considering for purchase might provide a fruitful environment to Big Box electronics vendors such as Best Buy or even Amazon or e-Bay. It may be particularly helpful for merchants to maintain a constant presence in front of electrical contractors as they are making their purchase decisions.

Use of Software

The same group of respondents were shown a list of 17 types of business functions and asked how their firm handles these functions.

- Starting in the 2018 Profile Study, we asked about respondent use of software in a different way than in previous Profile Studies. Instead of asking the participants about their use of “software”, we asked if the respondents handled each of the (now 17) tasks “...internally, using a computer”. This was done because we had concerns that the word “software” may be ambiguous to survey participants. Specifically, over the past few Profile Studies we came to believe that the use of software question did not accurately reflect the computer related activity of electrical contractors. For instance, eight years ago, only 73% of those who took the survey online (where the invitation was sent by e-mail) said that they or their firm uses computer software to access the internet!

82% say that they handle one or more business functions in this way, which we see as another way of saying that they use software for these functions.

Fourteen of the 17 software types are statistically unchanged compared with two years earlier while three of the software types posted a statistically significant decrease.

- In those cases, there is some indication that the business functions are being handled differently—such as outsourcing rather than that they are not being performed.
- Larger firms are more likely than their smaller counterparts to currently use each of the different types of software shown on the next page. As a consequence, they are also more likely to currently use 8 or more types of software compared with firms with 1-9 employees.
- Similarly, firms that derive more than one half of their revenue from CII projects are also more likely than firms that work primarily on residential projects to currently use each of the types of software included in the survey. Note that firms that work primarily on CII projects tend to be larger.

The most frequently cited types of business functions or activities that are “handled internally, using a computer are”: Job Cost Control/Analysis (70%), Estimating (69%), Accounting/Payroll (68%), Procurement (63%), Scheduling Service Work/Logistics (61%), Time and Attendance (61%) Project Management (59%), Take-Off (58%), Productivity Software (56%), Tool/ Equipment Inventory Control 51% and Workforce Management (49%).

METHODOLOGY

This report focuses on electrical contractors' purchase and rental/lease of communications, meters, electronic devices and software. While no new types of tools and equipment were added in 2024, in 2022, four new categories were included: Robots, Surveying tools, Temporary power and Wearable technology. Please note that the Profile study is conducted in even years (2024 or 2022) and asks about the previous year (2023 or 2021).

The survey was conducted by internet among subscribers to ELECTRICAL CONTRACTOR magazine. In addition, in 2024, as was the case in 2018 through 2022, about 100 members of the ELECTRICAL CONTRACTOR Subscriber Research Panel also participated in the survey. The field period for the survey began on January 24, 2024, and ran through March 31, 2024. A total of 828 participants completed the survey in that time.

Each respondent who received the survey through the internet was sent up to seven follow-up emails. An incentive was offered for participation in the survey: For each completed survey, ELECTRICAL CONTRACTOR would contribute \$5 to charity, up to a total of \$10,000. In addition, in 2024, as was the case since 2018, the magazine also offered a sweepstakes drawing for a chance to win one of ten \$150 Amazon e-gift cards. In 2018 and 2020, the drawing was for one of five \$150 Amazon e-gift cards.

The internet option was first introduced in 2004.

As was the case since 2004, the survey was produced in different versions. Starting with the 2008 Profile study, there were four versions of the survey, which differed from each other on fewer than 10 questions. The first 30 questions were common to all versions. Since 2018, there have been 7 versions.

This report and its companion report are drawn from Versions 3—tools and equipment used, purchased, rented/leased—and from Version 8—business activities conducted in-house, using a computer—and use/ownership and planned acquisition of electronic devices. The base sizes of those version are as follows: Version 3 has a base size of 158 and Version 8 has a base size of 142.

As in the past, statistical testing was done at the 90% level of confidence.

This research was conducted by New York, NY-based Renaissance Research & Consulting, Inc. (www.renaiss.com), an independent marketing research firm that has, as one of its specialties, market research for the construction industry.

DETAILED FINDINGS: Tools and Equipment Purchase and Rental/Lease Overview

Percent That Purchase Different Types of Tools and Equipment

Nine in ten electrical contractors (92%) reported purchasing tools and equipment in 2023, statistically unchanged from two years earlier.

In 2023, Hand tools and Power tools continue to top the list at around 80%+ each, followed distantly by Electrical testers, multimeters, Measuring tools (including digital), Fishing tools and Personal protective equipment, including apparel and accessories, at around 68% to 60%.

About 5 in 10 electrical contracting firms reported a 2023 purchase of: Phones (smart/mobile/cell or two-way radios/push to talk) and Labeling/identification (cable/panel),

About four in 10 electrical contracting firms reported a 2023 purchase of: Pipe threaders, benders, cutters, Job-site safety equipment, Tablets or portable reading devices and and Temporary job-site lighting.

Between about 30% and 20% reported a 2023 purchase of Temporary power, Cable pullers, Portable generators, LAN, datacom, other low-voltage, and Thermal imaging

18% to 12% of electrical contracting firms reported a 2023 purchase of: Wearable technology, Trailers (to haul equipment/materials), Aerial lifts/scaffolding and Digging/HDD/boring equipment.

10% or less of electrical contracting firms reported a 2023 purchase of Surveying tools, Drones, Mobile office space (construction trailers), 3D scanners, 3D printers, Cranes, Robots.

As shown on the next page, the reported purchase of 10 of the 28 types of tools and equipment posted a statistically significant increase between 2021 and 2023 with the other categories remaining unchanged. None showed a statistically significant decline between 2021 and 2023.

PURCHASE OF TOOLS AND EQUIPMENT

V3, Q 14A, T74 1(Trend p.211)	In 2023		In 2021		In 2019		In 2017		In 2015
	Total		Total		Total		Total		Total
Bolded numbers denote and arrows significant differences at the 90% level of confidence	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
“Any” Purchase ...	92	=	87	=	84	=	81	>	79
Hand tools	86	>	74	=	74	=	70	=	70
Power tools	82	=	75	=	68	=	66	=	70
Electrical testers, multimeters, etc.	68	>	53	=	55	>	45	=	46
Measuring tools (including digital) (first asked in 2020 Profile Study)	66	>	52	=	49		N/A		N/A
Fishing tools (first asked in 2020 Profile Study)	61	>	47	=	46		N/A		N/A
Personal protective equipment, including apparel and accessories	60	>	44	=	43	=	42	>	31
Phones: smart/mobile/cell or two-way radios/push-to-talk	55	=	47	=	43	=	37	=	37
Labeling/identification (cable/panel)	54	>	40	=	36	=	34	>	22
Pipe Threaders, benders, cutters	41	=	36	=	35	=	28	>	22
Job-site safety equipment	40	=	35	=	34	=	28	=	26
Tablets or portable reading devices	39	>	27	=	31	=	24	>	16
Temporary job-site lighting (first asked in 2016)	35	>	23	=	26	=	23	>	15
Temporary power (first asked in 2022)	32	=	26		NA		NA		NA
Cable pullers (first asked in 2014 Profile Study)	31	=	24	=	25	=	19	>	10
Portable generators (first asked in 2016 Profile Study)	29	>	16	=	19	=	16	=	19
LAN, datacom, other low-voltage	25	=	25	=	22	>	14	>	9
Thermal imaging (first asked in 2014)	22	=	19	=	12	=	10	=	8
Wearable technology (first asked in 2022)	18	=	14		NA		NA		NA
Trailers (to haul equipment/materials) (first asked in 2016)	16	=	18	=	17	=	12	=	9
Aerial lifts/scaffolding	13	=	10	=	11	>	6	<	10
Digging/HDD/boring equipment	12	>	5	=	9	>	4	=	7
Surveying tools (first asked in 2022)	10	=	14		NA		NA		NA
Drones (first asked in 2018 Profile Study)	8	=	7	=	5	>	2		N/A
Mobile office space (construction trailers) (first asked in 2016 Profile Study)	7	=	3	=	5	=	3	=	4
3D scanner (first asked in 2018 Profile Study)	4	=	7	=	5	=	2		N/A
3D printer (first asked in 2020 Profile Study)	3	=	8	=	4		N/A		N/A
Cranes (first asked in 2016 Profile Study)	3	=	2	=	3	=	1		2
Robots (first asked in 2022)	1	=	3		NA		NA		NA

Bolded numbers denote and arrows significant differences at the 90% level of confidence

Purchase in Multiple Categories

As has been the case in earlier Profile studies, in 2023, the bulk of electrical contractors made purchases in *multiple* categories (91% in 2023), statistically unchanged compared to two years ago.

- However, a statistically significantly higher percentage of electrical contractors reported making purchases in 2+, 4+ and 6 or more tools and equipment categories in 2023 compared with 2021.

PURCHASE IN MULTIPLE CATEGORIES										
V3, Q 14A, T74 (Trend p.216)	In 2023		In 2021		In 2019		In 2017		In 2015	In 2013
	Total		Total		Total		Total		Total	Total
	(158)		(106)		(236)		(234)		(376)	(374)
	%		%		%		%		%	%
<u>Any Purchase</u>	92**	=	87	=	84	=	81	=	79	< 84
Purchased Only 1 Category	2	=	4	=	5	=	6	=	5	= 3
Purchase in Multiple (2+) Categories	91	>	83	=	79	=	75	=	74	< 81
Purchased in 2 – 3 Categories	11	=	16	=	13	<	22	=	21	= 20
Purchase in 4+ Categories	80	>	67	=	66	>	53	=	53	< 61
Purchased in 4 – 5 Categories	12	=	9	=	13	=	16	=	18	= 19
Purchased in 6+ Categories	68	>	58	=	53	>	37	=	35	< 42
Purchased in 6-8 Categories	20	=	20	=	17		--		--	--
Purchased in 9+ Categories	48	(>)	38	=	36		--		--	--

** difference due to rounding

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

(>) Just short of statistical significance

Purchase in Multiple Categories, continued

By number of employees: Those in larger firms (10+ employees) were significantly more likely to have made Any Purchase, especially in 4+, 6+ categories and 9 + categories.

- By contrast, firms with 1-9 employees are more likely than their larger counterparts to have made 2-3 category purchases.

By primary type of work: Firms that work on primarily residential projects are more likely to have purchased in only a single category in 2023, while firms working primarily on CII projects are significantly more likely to have made purchases in 4+, 6+ and 9+ categories.

	PURCHASE IN MULTIPLE CATEGORIES (2023)					
		Number of Employees			Work Primarily In	
	Total	1-9	10+		Residential	CII
	(158)	(89)	(68)*		(64) *	(76)
	%	%	%		%	%
<u>Any Purchase</u>	92	89	<97		89 =	95
Purchased Only 1 Category	2	2	2		5>	0
<u>Purchase in Multiple (2+) Categories</u>	91	87	<96		85	<95
Purchased in 2 – 3 Categories	11	17 >	3		16>	7
<u>Purchase in 4+ Categories</u>	80	70	<93		69	<89
Purchased in 4 – 5 Categories	12	17 >	6		16	11
Purchased in 6+ Categories	68 >	53	< 87		53	<78
Purchased in 6-8 Categories	20	30	7		27>	13
Purchased in 9+ Categories	48	23	< 80		27	< 65

V3, Q 14A, T741 (Trend), not shown in this table B2, p

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Trended Results

Among the total sample: There are no statistically significant differences between 2023 and 2021 in the table shown below terms of Any Purchase. However, more electrical contractors made multiple category purchases (2+, 4+, 6+ but not 9+) in 2023 compared with 2021.

Among firms with 1-9 employees: There are no statistically significant differences between 2023 and 2021 in the table shown below. Substantially more respondents made 4+ purchases, although the difference is just short of statistical significance.

Among firms with 10+ employees: Firms with 10+ employees are significantly more likely to have made Any category purchase of tools and equipment and to have made purchases in multiple categories (2+, 4+, 6+ and 9+).

PURCHASE in MULTIPLE CATEGORIES (By Firm Size)														
	Total Sample					1-9 Employees					10+ Employees			
	2023	2021	2019	2017		2023	2021	2019	2017		2023	2021	2019	2017
	(158)	(106)	(236)	(234)		(89)	(58)*	(150)	(162)		(68)*	(48)*	(85)	(71)
	%	%	%	%		%	%	%	%		%	%	%	%
Any Purchase	92 **=	87	84	81		89	88	83	78		97>	85	87	87
Only 1 Category	2	4	5	6		2 =	7	7	9		2	0	1	0
In Multiple Categories	91>	83	79	75		87 =	81	75	69		96>	85	86	87
In 2 – 3 Categories	11	16	13	< 22		17 =	24	18	< 27		3	6	5	10
In 4+ Categories	80>	67	66>	53		70 (>)	57	57>	42		93>	79	81	77
In 4 – 5 Categories	12	9	13	16		17=	12	15	18		6	6	8	11
In 6+ Categories	68 >	58	53>	37		53=	45	42>	24		87 >	73	73	66
In 6-8 Categories	20	20	17	--		30=	22	19	--		7	17	14	--
In 9+ Categories	48 (>)	38	36	--		23=	22	23	--		80 >	56	59	

** difference due to rounding

V3, Q 14A, T741(Trend

(>) The difference is just short of statistical significance at the 90% level of confidence

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Percent That Rent/Lease Different Types of Tools and Equipment

In 2023, as was the case in 2021, 2019 and in 2017, about six in ten electrical contractors (58%) rented/leased equipment. Note that in 2015 and 2013, not shown in this table, the rental/lease rate was substantially and significantly lower—in the 37% to 40% range.

Nevertheless, as has been the case in recent Profile studies, fewer electrical contractors continue to obtain tools and equipment through rental/lease (58%) than through outright purchase (92%).

As was also the case two and four years ago, in addition to Aerial lifts/scaffolding and Digging/HDD/boring equipment, Cranes and Mobile office space (trailers) are the only four categories that are more likely to be obtained through rental/lease than through purchase. All are statistically unchanged compared to two years earlier.

Aerial Lifts/scaffolding and Digging/HDD/boring equipment continue to be the two categories that are obtained through rental/lease most often. Both are statistically unchanged compared to two years earlier. (There was also no statistically significant change between 2019 and 2017 on this measure.)

- Compared with two years earlier, rental/lease levels are unchanged for all of the 28 categories of tools and equipment with the exception of Measuring tools where it declined from 6% in 2021 to 0% in 2023.

RENTAL/LEASE OF TOOLS AND EQUIPMENT									
	In 2023		In 2021		In 2019		In 2017		In 2015
	Total		Total		Total		Total		Total
	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
“Any” Lease/Rental...	58	=	61		60	=	57	>	37
Aerial lifts/scaffolding	46		48		45	=	46	>	28
Digging/HDD/boring equipment	33		30		34	=	28	>	12
Cranes	24		23		25	>	17	>	6
Mobile office space (trailers)	21		20		14	=	12	>	6
Trailers (to haul equipment/materials)	14		12		9	=	8	>	3
Portable generators	12		15		13	=	11	>	4
Temporary job-site lighting	8		10	>	5	=	4	=	2
Job-site safety equipment	8		4		7	=	6	>	1
Cable pullers	7		7		8	=	8	>	3
Power Tools	6		9	=	12	>	8	>	4
Thermal imaging	6		7		5	=	4	>	1
Temporary power	6		8		NA		NA		NA
Electrical testers, multimeters, etc.	5		9	>	3	=	4	=	2
Drones	4		1.9		1.7	=	0.4		N/A
Surveying tools	4		7		NA		NA		NA
Hand tools	3.2		8		6	=	4	=	2
3D scanner	3		6	=	2.1	=	1.6		N/A
Pipe threaders, benders, cutters	3		4		6	=	5	>	2
LAN, datacom, other low-voltage	3		3	=	2	=	2.8	>	0.6
Robots	1.9		1.9		NA		NA		NA
3D printer	1.3		4		2		N/A		N/A
Phones: smart/mobile/cell or two-way radios/push-to-talk	1.3		3	=	3	=	3	>	0.8
Personal protective equipment, including apparel and accessories	1.3		2		3	=	2	=	0.6
Tablets or portable reading devices	1.3		1.9		1.7	=	0.4	=	1
Wearable technology	1.3		1.9		NA		NA		NA
Fishing tools	1		0	<	3		N/A		N/A
Software	NA		NA		4.2	=	2.6	>	0.9
Measuring tools (including digital)	0	<	6	>	1.7		N/A		N/A
Labeling/identification (cable/panel)	0		0	<	1.3	=	0.4	=	0.6

V3, Q 14A, T75 (Trend p.218), B1, p 250, B2, p259

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Rental/Lease in Multiple Categories

Among the total sample, 44% of electrical contractors rented/leased in two or more categories, statistically unchanged from the 40% observed two years ago.

- While fewer electrical contractors rented/leased in a single category, there is no statistically significant difference in the overall percentages that rented/leased in 2+ or 3+ categories.

RENTAL/LEASE IN MULTIPLE CATEGORIES									
	2023		2021		2019		2017		2015
	(158)		(106)		(236)		(234)		(376)
	%		%		%		%		%
<u>Any Lease/Rental</u>	<u>58</u>		<u>61</u>	=	<u>60</u>	=	<u>57</u>	>	<u>37</u>
Only 1 Category	13	<	22	>	14	=	16	=	18
<u>Lease/Rent in Multiple/2+ Categories</u>	<u>44</u>	=	<u>40</u>	=	<u>46</u>	=	<u>41</u>	>	<u>19</u>
In 2 Categories	14	>	8	=	13	=	14	>	8
In 3+ Categories	30	=	32	=	33	=	27	>	11

V3, Q 14A, T751 (Trend1)

- As was the case two years ago, larger electrical contracting companies are more likely than smaller electrical contractors to have leased/rented tools and equipment at all (“Any”) and also in the multiple categories of 2+ and 3+ types of tools and equipment.
- As was also the case two years ago, a higher percentage of firms that work primarily on CII projects have rented/leased at all (“Any”) and in the multiple categories of 2+ and 3+ types of tools and equipment compared with firms working primarily on residential projects.
 - As noted in the past, we believe that this is due to the larger companies being involved in larger, more complex and sophisticated projects that require *more different types* of tools and equipment.

	In 2023				
	Number of Employees			Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Any Lease/Rental	<u>58</u>	38	< 82	<u>42</u>	<u>67</u>
Only 1 Category	13	15	12	13	13
Lease/Rent in Multiple /2+ Categories	<u>44</u>	<u>24</u>	<u><71</u>	29	<54
In 2 Categories	14	<u>10</u>	19	14	15
In 3+ Categories	30	14	< 52	16	<39

V3, Q 14A, T751 B1 and B2

* Caution: small base

Lease/Rental in Multiple Categories, continued

Trended: In 2023, across the total sample, electrical contractors are less likely to have rented/leased in only a single category than was the case two years ago. There are no differences by number of employees on this measure.

RENTAL/LEASE in MULTIPLE CATEGORIES (By Firm Size)														
	Total Sample					1-9 Employees					10+ Employees			
	2023	2021	2019	2017		2023	2021	2019	2017		2023	2021	2019	2017
	(158)	(106)	(236)	(234)		(89)	(58)*	(150)	(162)		(68)*	(50)*	(85)	(71)
	%	%	%	%		%	%	%	%		%	5	%	%
“Any” Lease/Rental	<u>58</u>	<u>61</u>	<u>60</u>	<u>57</u>		38 =	45	<u>51</u>	<u>47</u>		82	81	<u>75</u>	<u>81</u>
Only 1 Category	13 <	22 >	14	16		15 =	26 >	15	17		12 =	17	12	13
<u>Lease/Rent in Multiple/2+ Categories</u>	<u>44</u>	<u>40</u>	<u>46</u>	<u>41</u>		<u>24</u>	<u>19</u>	<u>< 37</u>	<u>30</u>		<u>71 =</u>	<u>64</u>	<u>64</u>	<u>68</u>
In 2 Categories	14	8	13	<u>14</u>		<u>10</u>	<u>5</u>	<u>< 12</u>	<u>12</u>		19 =	10	14	<u>19</u>
In 3+ Categories	30	32	33	27		14	14	< 25	18		52	54	49	49

V3, Q 14A, T75 (Trend p.223)

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Communications and Meters

Electrical Testers and Multimeters Purchase Behavior

In 2023, 68% of respondent firms *purchased* Electrical testers and multimeters (etc.), a statistically significant increase compared with two years earlier.

- 5.1% *rented/leased* in this category, statistically unchanged from two years earlier.

ELECTRICAL TESTERS and MULTIMETERS (Trended)									
	In 2023		In 2021		In 2019		In 2017		In 2015
	(158)		(106)		(236)		(234)		(376)
Purchase Level	68%	>	53%	=	55%	>	45%	=	46%
Rental/Lease	5.1%	=	8.5 %	>	2.5%		3.7%		--

- Larger firms are statistically more likely to have *purchased* Electrical tester and multimeters compared with smaller firms.
- However, there is no difference by number of employees or by primary type of work performed in the *rental or lease of Electrical testers and multimeters*.

ELECTRICAL TESTERS and MULTIMETERS (2023)						
		Number of Employees			Work Primarily In	
	Total	1-9	10+		Residential	CII
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase Level	68	57	< 82		59	= 74
Rental/Lease	5.1	3.4	= 7.4		1.6	= 8

Bolded numbers denote significant differences at the 90% level of confidence

* Caution – small base

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Trended Results

Compared with two years ago, *purchase* of Electrical testers, multimeters, (etc) posted a statically significant increase among the total sample. In addition, purchase rose significantly among firms with 10+ employees and/or among firms who work primarily on CII projects.

Rental/lease is statistically unchanged among the total sample and among the sub-groups shown below as well.

Electrical Testers/Multimeters												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	57 =	48 =	48	82 >	58 =	68	59 =	47 =	42	74 >	48	< 66
Rental/Lease	3.4 =	3.4 =	0.7	7.4 =	14.6 >	5.9	1.6 =	2.8 =	1.2	8 =	10 >	3.4

Bolded numbers denote significant differences at the 90% level of confidence

* Caution – small base

(>) Just short of statistical significance

Estimates and Projections: Electrical Testers and Multimeters

ALL INDUSTRY ESTIMATE OF 2023 FIRMS PURCHASING AND RENTING/LEASING: ELECTRICAL TESTERS AND MULTIMETERS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	68.4	81,842	55,980
Rental/Lease	5.1	81,842	4,174

LAN, Datacom, Other Low Voltage Testing Equipment Purchase Behavior

25% of respondent firms surveyed *purchased* LAN, datacom, other low-voltage testing equipment in 2023, statistically unchanged compared with two years earlier.

- 3.2% *rented/leased* in this category, also statistically unchanged from two years earlier.

LAN, DATACOM and OTHER LOW VOLTAGE EQUIPMENT (Trended)									
	In 2023		In 2021		In 2019		In 2017		In 2015
	(158)		(106)		(236)		(234)		(376)
Purchase Level	25%	=	25%	=	22%	>	14%	>	9%
Rental/Lease	3.2%	=	2.8%	=	1.7%	=	2.8%		--

- In 2023, *purchase* was significantly higher among larger companies (10+ employees) vs. smaller companies (1-9 employees) and/or among firms working primarily on CII projects rather than firms working on primarily residential projects.
- In 2023, there is no difference in *rental/lease* by subgroup.

LAN, DATACOM and OTHER LOW VOLTAGE TESTING EQUIPMENT (2023) (By Firm Size and Primary Work Type)					
		Number of Employees		Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase Level	25	11	< 43	11	< 33
Rental/Lease	3.2	1.1	= 4.2	0	= 6.6

Bolded numbers denote significant differences at the 90% level of confidence

* Caution – small base

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Trended Results

Compared to two years earlier, *purchase* of LAN, datacom, other low-voltage testers is statistically unchanged among the total sample and by the subgroups shown below.

The same holds true for *rental/lease*, which is also statistically unchanged compared to two years earlier among the total sample and by the subgroups shown below.

LAN, Datacom, Other Low Voltage Testing Equipment												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)*	(150)	(68)*	(48)	(85)	(64)8	(36)*	(84)	(76)	(50)	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	11 =	10 =	15	43 =	42 =	34	11 =	8 =	10	33 =	30 =	31
Rental/Lease	1.1 =	1.7 =	0.7	4.2 =	4.2 =	3.5	0	0	0	6.6 =	4	2.6

Bolded numbers denote significant differences at the 90% level of confidence

* Caution – small base

Estimates and Projections: LAN, Datacom, And Other Low Voltage Testing Equipment

ALL INDUSTRY ESTIMATE OF NUMBER OF 2023 FIRMS PURCHASING AND RENTING/LEASING: LAN, DATACOM, OTHER LOW VOLTAGE TESTING EQUIPMENT

	Percent of Respondent Firms Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	25.3	81,842	20,706
Rental/Lease	3.2	81,842	2,619

Thermal Imaging Purchase and Rental/Lease Behavior

22% of electrical contracting firms surveyed *purchased* Thermal imaging in 2023 statistically unchanged compared to two years ago. The level of *rental/lease*, at 6.3%, is also statistically unchanged compared with 2021.

THERMAL IMAGING						
	In 2023		In 2021		In 2019	In 2017
	Total		Total		Total	Total
	(158)		(106)		(236)	(234)
Purchase	22	=	19%	=	12%	10%
Rented/Leased	6.3%	=	6.6%	=	4.7%	4.1%

Larger firms are significantly more likely to have made a *purchase* of Thermal imaging compared with smaller firms. There is no difference in purchase likelihood of Thermal imaging devices by primary type of work performed.

Rental/lease is more prevalent among firms that work primarily on CII projects compared with firms that work primarily on residential projects. There is no statistically significant difference in renting/lease in this category by number of employees.

THERMAL IMAGING (2023)					
	Number of Employees			Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase	22	10	< 35	11	= 29
Rented/Leased	6.3	2.2	< 12	3.1	= 8

Bolded numbers denote significant differences at the 90% level of confidence

* Caution – small base

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Trended Results

Compared with two years ago, there are no statistically significant differences by subgroup in *purchase* or in *rental/lease* of Thermal imaging by either company size or by the primary type of work performed.

THERMAL IMAGING												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)*	(150)	(68)*	(48)	(85)	(64)*	(36)*	(84)	(76)	(50)	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase	10 =	9 =	7	35 =	31 =	20	11 =	14 >	2.4	29 =	22 =	16
Rental/Lease	2.2 =	3.4 =	3.3	12 =	10 =	7.1	3.1 =	0 =	1.2	8 =	10 =	6.9

Bolded numbers denote significant differences at the 90% level of confidence

* Caution – small base

Estimates and Projections: Thermal Imaging

ALL INDUSTRY ESTIMATE OF NUMBER OF 2023 FIRMS PURCHASING AND RENTING/LEASING OF THERMAL IMAGING

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	21.5	81,842	17,596
Rental/Lease	6.3	81,842	5,156

Logistics and Communications

Labeling/Identification (Cable/Panel) Purchase Behavior

54% of electrical contracting firms surveyed purchased Labeling/identification (cable/panel) equipment in 2023; this is a statistically significant increase from the 40% reported in 2021.

- 0% rented/leased in this category in 2023 (it was 0% two years earlier); as a result, we are not including it in the analysis.

LABELING/IDENTIFICATION (CABLE/PANEL) PURCHASE (Trended)									
	In 2023		In 2021		In 2019		In 2017		In 2015
	(158)		(106)		(236)		(234)		(376)
Purchase Level	54%	>	40%	=	36%	=	34%	>	22%

- Larger firms and firms working primarily on CII projects are more likely to have made a past year purchase in this category.

LABELING/IDENTIFICATION (CABLE/PANEL) IN 2023 (By Firm Size and Primary Work Type)					
	Number of Employees			Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
Purchase Level	54	35	< 79	34	< 70

Bolded numbers denote significant differences at the 90% level of confidence

* Caution – small base

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Trended Results

As noted above, purchase rose compared with two years earlier among the total sample. In addition, levels also rose among larger firms and/or among firms that work primarily on CII projects.

LABELING/IDENTIFICATION (Cable/Panel) EQUIPMENT PURCHASES												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)	(150)	(68)*	(48)	(85)	(64)*	(36)*	(84)	(76)	(50)	(116)
Purchase Level	35% =	26% =	23%	78% >	56% =	59%	34 =	25% =	18%	70 >	48% =	49%

Bolded numbers denote significant differences at the 90% level of confidence.

* Caution – small base

Estimates and Projections: Labeling/Identification (Cable/Panel)

ALL INDUSTRY ESTIMATE OF NUMBER OF 2023 FIRMS PURCHASING: LABELING/IDENTIFICATION (CABLE/PANEL)

	Percent of Respondent Firms Buying	Number of EC Firms (Source: 2022 BP)	Projected Number Firms Buying
	%	#	#
Purchase	53.8	81,842	44,030

Phones: Smart/Mobile/Cell or Two-Way Radios/Push-to-Talk Phones: Purchase and Rental/Lease Behavior

55% of electrical contracting firms surveyed *purchased* Phones: Smart/Mobile/Cell or Two-Way Radios/Push-to-Talk Phones in 2021. There is no statistically significant difference between 2023 and 2021.

- The percentage that *rent/lease* in this category is 1.3%, statistically unchanged from the 2.8% recorded in 2021.

PHONES: MOBILE/CELL or TWO-WAY RADIOS/PUSH-TO-TALK PHONES PURCHASE AND RENTAL/LEASE (Trended)									
	In 2023		In 2021		In 2019		In 2017		In 2015
	(158)		(106)		(236)		(234)		(376)
Purchase Level	55%	=	47%	=	43%	=	37%	=	37%
Rental/Lease	1.3%	=	2.8%	=	3.0%	=	3.4%		--

- Larger firms and/or those that work primarily on CII projects are significantly more likely to have made a past year purchase compared with smaller firms and/or those that work primarily on residential projects.
- However, there is no difference in rental/lease by subgroups.

PHONES: SMART/MOBILE/CELL/TWO-WAY RADIOS or PUSH-TO-TALK PHONES PURCHASE AND RENTAL/LEASE (By Firm Size and Primary Work Type)						
	In 2023					
		Number of Employees			Work Primarily In	
	Total	1-9	10+		Residential	CII
	(158)	(89)	(68)*		(64)*	(76)
	%	%	%		%	%
Purchase Level	55	37	< 78		39	< 65
Rental/Lease	1.3	0	= 2.9		0	= 2.6

Bolded numbers denote significant differences at the 90% level of confidence.

* Caution – small base

Trended Results

Larger firms are significantly more likely to have purchased in this category compared with two years earlier. There are no other subgroup differences by subgroup compared with two years earlier in either *purchase* or *rental/lease*.

PHONES: SMART/MOBILE/CELL or TWO-WAY RADIOS/PUSH-TO-TALK PHONES PURCHASE AND RENTAL/LEASE												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	37 =	35 =	35	78 >	63 =	58	39 =	42 =	30	65 =	54 =	51
Rental/Lease	0 =	3.4 =	0.7	2.9 =	2.1 =	7.1	0 =	2.8 =	1.2	2.6 =	2 =	5.2

Bolded numbers denote significant differences at the 90% level of confidence.

* Caution – small base

Estimates and Projections: Phones

ALL INDUSTRY ESTIMATE OF NUMBER OF 2023 FIRMS PURCHASING AND RENTAL/LEASING: PHONES

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	55.1	81,842	45,094
Rental/Lease	1.3	81,842	1,064

Tablets or Portable Reading Devices Purchase Behavior

39% of electrical contracting firms surveyed reported a 2023 purchase of Tablets or portable reading devices. This is a statistically significant increase from 2021.

- The percentage that rent/lease in this category is 1.3%, unchanged from two years earlier.

TABLETS or PORTABLE READING DEVICES (Trended)									
	In 2023		In 2021		In 2019		In 2017		In 2015
	Total		Total		Total		Total		Total
	(158)		(106)		(236)		(234)		(376)
Purchase Level	39%	>	27%	=	31%	=	24%	>	16%
Rental/Lease	1.3%	=	1.9%	=	1.7%		--		--

- Firms with 10+ employees and/or firms that work primarily on CII projects are significantly more likely than firms with 1-9 employees and/or those that work primarily on residential projects to have made a 2023 Tablets or portable reading device purchase.
- There is no statistically significant difference by subgroup among the small number of electrical contractors that rent or lease Tablets or portable reading devices.

TABLETS or PORTABLE READING DEVICE (2023) (By Firm Size and Primary Work Type)					
	Number of Employees			Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase Level	39	19	< 65	22	< 51
Rental/Lease	1.3	0	= 2.9	0	= 2.6

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

* Caution – small base

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Trended Results

As noted, purchase levels rose significantly among the total sample compared to two years ago. Consistent with this, larger firms and/or firms that work primarily on CII projects are also significantly more likely to have posted increases in purchasing compared with two years ago.

However, there are no statistically significant differences in rental/lease in total or by subgroups compared with two years ago.

TABLETS or PORTABLE READING DEVICES												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	19 =	14 =	17	65 >	44 =	54	22 =	14 =	18	51 >	36 =	40
Rental/Lease	0 =	1.7 =	0.7	2.9 =	2.1 =	3.5	0	0	0	2.6 =	2	2.6

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

* Caution – small base

Estimates and Projections: Tablets and Portable Reading Devices

ALL INDUSTRY ESTIMATE OF NUMBER OF 2023 FIRMS PURCHASING AND RENTING/LEASING: TABLETS AND PORTABLE READING DEVICES

	Percent of Respondent Firms Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	39.2	81,842	32,082
Rental/Lease	1.3	81,842	1,064

New Technology

We've categorized four products as New Technology: Drones and 3D scanners, which were first asked in the 2018 Profile Study, 3D printers which were first asked in 2020 and Robots which were first asked in 2022. No new categories were added to the 2024 Profile Study.

As of 2023, *purchase* of Drones is 8%, 4% for 3D scanners, 3% for 3D printers and 1% for Robots. Rental/lease in these categories is comparably low: 4% for Drones and for 3D scanners, 1% for 3D printers and 2% Robots.

	Purchase in 2023	Purchase in 2021		Rent/Lease in 2023	Rent/Lease in 2021
	%	%		%	%
Drones	8	7		4	2
3D scanner	4	7		4	6
3D printer	3	8		1	4
Robots	1	3		2	2

Drones

8.2% of electrical contracting firms reported purchasing a drone in 2023, statistically unchanged compared with two years earlier. About 4% reported renting/leasing a Drone, also statistically unchanged compared with two years earlier.

Drones (Trended)							
	In 2023		In 2021		In 2019		In 2017
	Total		Total		Total		Total
	(158)		(106)		(236)		(234)
Purchase Level	8.2%	=	6.6%	=	5.1%	>	1.9%
Rental/Lease	3.8%	=	1.9%	=	1.7%	=	0.4%

In 2023, larger firms are more likely to have purchased a Drone. However, there are no other differences by subgroups in the purchase or rent/lease of Drones.

DRONES PURCHASE IN 2023 (By Firm Size and Primary Work Type)					
	Number of Employees			Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase Level	8.2	2.2	< 16	1.6	= 9
Rental/Lease	3.8	2.2	= 4.4	3.1	= 5.3

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

* Caution – small base

Trended Results

The only statistically significant difference shown below is that more firms working primarily on CII projects rented or leased a Drone in 2023 compared with 2021.

Drones (Trended)												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	2.2 =	3.4 =	2	16 =	10 =	10	1.6 =	2.8 =	1.2	9 =	6 =	5.2
Rental/Lease	2.2 =	1.7 =	0.7	4.4 =	2.1 =	3.5	3.1 =	0	0	5.3 >	0	< 2.6

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

* Caution – small base

Estimates and Projections: Drones

ALL INDUSTRY ESTIMATE OF NUMBER OF 2023 FIRMS PURCHASING AND RENTING/LEASING: DRONES

	Percent of Respondent Firms Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	8.2	81,842	6,711
Rental/Lease	3.8	81,842	3,110

3D Scanners

4.4% of electrical contracting firms surveyed reported purchasing a 3D scanner 2023, statistically unchanged compared with two years earlier.

3.2% reported renting/leasing a 3D scanner 2023 which is also statistically unchanged from the level reported for 2021.

3D Scanners (Trended)							
	In 2023		In 2021		In 2019		In 2017
	Total		Total		Total		Total
	(158)		(106)		(236)		(234)
Purchase	4.4%	=	6.6%	=	5.1%	=	2.4%
Rental/Lease	3.2%	=	5.7%	=	2.1%	=	1.6%

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

* Caution – small base

As shown below, in 2023, there are no subgroup differences by in the likelihood of purchasing or renting/leasing a 3D Scanner.

3D SCANNER PURCHASE IN 2023 (By Firm Size and Primary Work Type)					
		Number of Employees		Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase Level	4.4	3.4	= 5.9	3.1	= 5.3
Rental/Lease	3.2	2.2	= 2.9	0	= 5.3

Trended Results

Consistent with the fact that there were no statistically significant changes in purchase or rental/lease levels among the total sample compared with two years earlier, there are also no statistically significant differences by subgroup during the previous two years.

3D Scanners Trended												
	Number of Employees						Work Primarily In					
	1-9			10+			Residential			CII		
	2023	2021	2019	2023	2021	2019	2023	2021	2019	2023	2021	2019
	(89)	(58)*	(150)	(68)*	(48)*	(85)	(64)*	(36)*	(84)	(76)	(50)*	(116)
	%	%	%	%	%	%	%	%	%	%	%	%
Purchase Level	3.4 =	3.4 =	0.7	5.9 =	10 =	13	3.1 =	0 =	1.2	5 =	8 =	5.2
Rental/Lease	2.2 =	1.7 =	0.7	3 =	10 =	4.7	0	0	0	5 =	8	3.4

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

* Caution – small base

Estimates and Projections: 3D Scanners

ALL INDUSTRY ESTIMATE OF 2023 FIRMS PURCHASING AND RENTING/LEASING 3D SCANNERS

	Percent of Respondent Firms Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	4.4	81,842	3,601
Rental/Lease	3.2	81,842	2,619

3D Printers

3.2.% of electrical contracting firms surveyed purchased a 3D printer in 2023, statistically unchanged from its 2021 level.

1.3% of electrical contracting firms surveyed rented/leased a 3D printer in 2023, also statistically unchanged from its 2021 level.

3D Printers (Trended)					
	In 2023		In 2021		In 2019
	Total		Total		Total
	(158)		(106)		(236)
Purchase	3.2%	=	7.5%	=	4.2%
Rental/Lease	1.3%	=	3.8%	=	2.1%

There is no difference in *purchase* likelihood by number of employees or by primary type of work performed.

There is no difference in *rental/lease* likelihood by number of employees or by primary type of work performed.

3D PRINTER PURCHASE IN 2023 (By Firm Size and Primary Work Type)					
	Number of Employees			Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase Level	3.2	2.2	= 4.4	3.1	= 3.9
Rental/Lease	1.3	2.2	= 0	0	= 1.3

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

* Caution – small base

Trended Results

There is only one statistically significant difference shown below: Significantly fewer firms with 10+ employees *rented or leased* a 3D Printer in 2023 compared with two years earlier.

3D Printers (2023) -- Trended By Subgroup										
	Total		Number of Employees				Work Primarily In...			
			1-9		10+		Residential		CII	
	2023	2021	2023	2021	2023	2021	2023	2021	2023	2021
	(158)	(106)	(89)	(58)*	(68)*	(48)*	(64)*	(36)*	(76)	(50)*
	%	%	%	%	%	%	%	%	%	%
Purchase Level	3.2 =	7.5	2.2 =	5.2	4.4 =	10.4	3.1 =	5.6	3.9 =	6.0
Rental/Lease	1.3 =	3.8	2.2 =	1.7	0 <	6.3	0 =	0	1.3 =	4.0

Estimates and Projections: 3D Printers

ALL INDUSTRY ESTIMATE OF 2023 FIRMS PURCHASING AND RENTING/LEASING: 3D PRINTERS

	Percent of Respondent Firms Buying	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
	%	#	#
Purchase	3.2	81,842	2,619
Rental/Lease	1.3	81,842	1,064

Robots (This section also appears in the first volume of this Breakout report)

Both 2023 *purchase* and *rental/lease* remain low in this category:

- 1.3% reported purchasing a Robot in 2023.
- 1.9% reported rental/lease of a Robot in 2023.

ROBOTS (2023 Trended)		
	Total	
	2023	2021
	(158)	(106)
	%	%
Purchase Level	1.3 =	2.8
Rental/Lease	1.9 =	1.9

There are no statistically significant differences by the subgroups shown below in terms of purchase or rental/lease.

ROBOTS (2023)					
		Number of Employees		Work Primarily In	
	Total	1-9	10+	Residential	CII
	(158)	(89)	(68)*	(64)*	(76)
	%	%	%	%	%
Purchase	1.3	0	2.9	0	2.6
Rental/Lease	1.9	2.2	1.5	1.6	2.6

* Caution: small base

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

Trended Results

There are no statistically significant differences by the subgroups shown below in terms of purchase or rental/lease compared with two years earlier.

Robots (2023) -- Trended By Subgroup										
	Total		Number of Employees				Work Primarily In...			
			1-9		10+		Residential		CII	
	2023	2021	2023	2021	2023	2021	2023	2021	2023	2021
	(158)	(106)	(89)	(58)*	(68)*	(48)*	(64)*	(36)*	(76)	(50)*
	%	%	%	%	%	%	%	%	%	%
Purchase Level	1.3 =	2.8	0 =	0	2.9 =	6.3	0 =	0	2.6 =	6.0
Rental/Lease	1.9 =	1.9	2.2 =	1.7	1.5 =	2.1	1.6 =	0	2.6 =	0

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow

* Caution: small base

ALL INDUSTRY ESTIMATE OF 2023 NUMBER OF FIRMS PURCHASING AND RENTING/LEASING: ROBOTS

	Percent of Respondent Firms Buying or Renting	Number of EC Firms (Source: 2022 CBP)	Projected Number Firms Buying or Renting
Robots	%	#	#
Purchase	1.3	81,842	1,064
Rental/Lease	1.9	81,842	1,555

Use/Ownership of Computers and Electronic Devices

Certain questions in the 2024 Profile Survey were given to only a part of the sample in order to keep the overall survey shorter and more manageable. The findings in this section are based on a different set of respondents (those in V8) rather than those who answered the preceding questions on Tools and Equipment purchase (those in V3).

99% of respondents reported they that they or their firm uses/owns one or more of the 16 types of computers and electronic devices measured in this survey, statistically unchanged from 2021.

Ownership of phones and computers are on an approximate par, with 98% of survey participants reporting usage or ownership of Computers—Desktop/laptop/tablets—while 92% reported use or ownership of Phones (Smart phone/ Mobile phones/Two-way radios/Push-to-talk phones).

- Computers in total—Desktop/laptop/tablets—is statistically unchanged compared with two years ago.
- **Use or ownership of phones** *overall* posted a statistically significant **decrease** compared to two years ago. This decrease is probably due to a non-significant decrease in ownership of Smart phones (the largest component of this category) between 2022 and 2024.

However, at the same time, use/ownership of non-smart or non-multifunctional phones posted a statistically significant **increase** between 2022 to 2024 so that Smart phones are now a smaller ratio of the total category. That is, the ratio between Smartphones and phones that are not smart or multifunctional went from a ratio of about 5 to 1 (94% vs. 18%) to a ratio of about 3 to 1 (91% to 27%). It would be interesting to do research on this topic to determine why this is the case.

In 2018, we added a category called “New Technology” to include Thermal imaging cameras, VR/AR headsets, 3D scanners, Wearable technology and Drones. No new electronic devices were added to this question in 2022 or in 2024.

USE/OWNERSHIP OF COMPUTERS and ELECTRONIC DEVICES										
(V8) Q15A	In 2023		In 2021		In 2019		In 2017		In 2015	In 2013
	Total		Total		Total		Total		Total	Total
	(142)		(172)		(232)		(229)		(304)	(271)
	%		%		%		%		%	%
“ANY” Ownership	<u>99</u>	=	<u>99</u>	=	98	>	<u>94</u>	=	<u>95</u>	< 98
(Smart [*]) /Mobile/Cell Phones or Two-Way Radios (Net)	92	<	98	>	94	>	<u>89</u>	=	<u>89</u>	< 94
Smartphones [*] ^Δ	91	=	94	=	90	>	73	=	79	= 74
Two-way radios	31	=	30	=	29	=	26	=	25	= 29
Mobile phones/cell phones (not smart or multifunctional)	28	>	18	=	19	<	34	>	27	< 55
Push-to-talk phones	3.8	=	3.5	=	6	=	8	=	5	= --
Desktop/Laptop/Tablet (Net)	<u>98</u>	=	99	>	94	>	<u>85</u>	<	91	= <u>90</u>
Desktop Computer (office/trailer) ^Δ	84	=	87	>	76	=	72	<	82	= 81
Laptops ^Δ	80	=	81	>	74	>	62	<	74	> 66
Tablets (iPad®, etc.) ^Δ	64	=	56	=	50	=	43	<	54	> 40
GPS	40	=	35	=	31	=	31	<	38	= 40
Fleet tracking	30	>	19	>	10	=	11	=	10	= 7
Time clocks or personnel tracking devices	20	>	11	=	10	=	9	=	8	= 8
New Technology (Net)	<u>40</u>	=	<u>41</u>	=	<u>33</u>	=	<u>35</u>		--	= --
Thermal imaging camera	32	=	33	=	25	=	29		--	= --
Wearable technology	13	=	11	>	6	=	5.7		--	= --
Drones	10	=	7.6	=	8.2	>	3.1		--	= --
3D scanners	10	>	4.1	=	6.5	=	6.2		--	= --
VR/AR headsets or hardhats	3.8	=	4.1	=	5.2	=	8.8		--	= --
3D printers [*] ^Δ	6.2	>	1.7	=	2.6		--		--	= --
Robots	1.5		-		-		-		-	= -

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

^{*} ^Δ 3D printer was added in 2020

^Δ Wording changed in 2014 from Workstations to Desktop Computer (Office/Trailer)

^Δ Wording changed in 2014 from Field Laptop to Laptop

^Δ Wording changed in 2014 from Smartphones or PDAs to Smartphones

^Δ Wording changed in 2018 from Tablets (iPad®, etc.) to Tablets (iPad®, etc.) of any size

Use/Ownership of Computers and Electronic Devices, continued

Use/ownership of the specific types of computer and electronic equipment is typically statistically significantly higher among larger electrical contracting firms compared to their smaller counterparts. The only exceptions are Any usage and the two largest categories of Desktops/Laptops on a net or total basis and Smart/Mobile phones/cell phones on a net or total basis and Smartphones, where there is no difference. In contrast, phones that are not smart or multifunctional and Push-to-talk phones are more likely to be used/owned by larger firms. There is also no difference by company size on these types of New Technology: Wearable technology and 3D scanners, 3D printers and Robots.

- As was the case two years ago, note that there are no categories where use/ownership is statistically higher among firms with 1-9 employees compared with their larger counterparts.

In addition, usage and ownership of electronic devices tends to be higher among firms that work primarily on CII construction compared to those firms that work primarily on residential construction. The only exceptions are the same as by number of employees where there are no exceptions in Any usage and in the two largest categories of Desktops/Laptops and Smartphones and Mobile phones on a net or total basis. In addition, there are no differences by primary type of work performed on GPS systems, Time clocks (personnel tracking devices) and these types of New technology: Wearable technology, Drones, 3D scanners and 3D printers, Robots.

USE/OWNERSHIP OF COMPUTERS and ELECTRONIC DEVICES (In 2023)						
(V8) Q15A		Number of Employees			Work Primarily In	
	Total	1-9	10+		Residential	CII
	(142)	(66)	(76)		(50)	(78)
	%	%	%		%	%
<u>“ANY” Ownership</u>	<u>99</u>	<u>98 =</u>	<u>99</u>		<u>98=</u>	<u>99</u>
(Smart*) /Mobile/Cell Phones or <u>Two-Way Radios (Net)</u>	<u>92</u>	<u>93</u>	<u>92</u>		<u>91 =</u>	<u>94</u>
Smartphones	91	90	92		89 =	94
Two-way radios	31	14	< 45		13	< 41
Mobile phones/cell phones (not smart or multifunctional)	28	15	< 38		20	< 30
Push-to-talk phones	3.8	3.4 =	4.2		2.2 =	1.4
Desktop/Laptop/Tablet (Net)	<u>98</u>	<u>97 =</u>	<u>99</u>		<u>96 =</u>	<u>99</u>
Desktop computer (office/trailer)	84	76	< 90		76	< 89
Laptops	80	71	< 87		63	< 89
Tablets (iPad®, etc.)	64	41	< 83		50	< 72
GPS	40	31	< 48		39 =	37
Fleet tracking	30	9	< 48		17	< 34
Time clocks or personnel tracking devices	20	10	< 28		20 =	20
<u>New Technology (Net)</u>	<u>40</u>	<u>20</u>	<u>< 56</u>		<u>30</u>	<u>< 48</u>
Thermal imaging camera	32	12	< 48		15	< 39
Wearable technology	13	10 =	16		13 =	11
Drones	10	3	< 16		7 =	9
3D scanner	10	7 =	13		4.3 =	10
VR/AR headsets or hardhats	3.8	3.4 =	4.2		2.2 =	2.8
3D printer (First asked in 2020)	6.2	5 =	7		2.2 =	4.2
Robots	1.5	0=	2.8		0=	2.8

Bolded numbers denote significant differences at the 90% level of confidence in the direction of the arrow.

Electronic Devices Company is Considering Adding

54% of the electrical contractors surveyed are considering adding computers and/or electronic devices in the next 12 months. This is a statistically significant decrease compared to two years earlier, although still a substantial percent. Further, none of the individual categories posted a significant change compared with two years earlier.

Overall, 22% of the electrical contractors surveyed said that they are considering a purchase of one or more of these “New Technology” devices: Thermal imaging cameras (10%, unchanged from two years earlier), Wearable technology (9%), Drones (7%), and 5% or less for 3D scanner or a 3D printer (all unchanged from two years earlier)

While these numbers are still small, we will be watching their progress and expect them to increase, perhaps even dramatically over time.

In the more mature categories of Computers and Phones, 41% of those surveyed are considering the purchase of a Desktop, Laptop and/or Tablet, as a broad category. 25% are considering the purchase of one or more type of Phone or Two-way radio/ Push-to-talk phone.

As we noted two, four and six years ago, the wide array of computers and electronic devices that electrical contractors are considering for purchase might provide a fruitful environment to Big Box electronics vendors such as Best Buy or even Amazon or e-Bay. It may be particularly helpful for marketers to maintain a constant presence in front of electrical contractors as they are making their purchase decisions.

The following individual product types, mentioned most often as considered additions:

Highlighting indicates considered additions 10% and over	Total Considering Adding (2024 Profile Study)	Total Considering Adding (2022 Profile Study)
	(142)	(172)
	%	%
“ANY”	54%	≤67
Computers/Laptops/Tablets	41	45
Tablets (iPad®, etc.)	30	29
Laptops	27	27
Desktop computer (office/trailer)	24	23
Phones	25	28
Smartphones	21	24
Fleet tracking devices	12	9
New Technology	22	26
Thermal imaging cameras	10	10
Wearable technology	9	5.2
Drones	7	11
3D scanner	5	4.7
VR/AR headsets or hardhats	4	4.1
3D printer	3	5.2

Use of Software

Δ Current Use of Software

The same group of respondents were shown a list of 17 types of business functions and asked how their firm handles these functions.

- Starting in the 2018 Profile Study, we asked about respondent use of software in a different way than in previous Profile Studies. Instead of asking the participants about their use of “software,” we asked if the respondents handled each of the (now 17) tasks “...internally, using a computer”. This was done because we had concerns that the word “software” may be ambiguous to survey participants. Specifically, over the past few Profile Studies we came to believe that the use of software question did not accurately reflect the computer related activity of electrical contractors. For instance, eight years ago, only 73% of those who took the survey online (where the invitation was sent by e-mail) said that they or their firm uses computer software to access the Internet!

As shown below, 82% say that they handle one or more business functions in this way, which we see as another way of saying that they use software for these functions.

Fourteen of the 17 software types are statistically unchanged compared with two years earlier while three of the software types posted a statistically significant decrease.

- In those cases, there is some indication that the business functions are being handled differently—such as outsourcing rather than that they are not being performed.

Use of Software (Trended)		
	Task Handled Internally, Using a Computer (V8)	
	2024	2022
	(142)	(172)
	%	%
ANY	82 <	92
Job Cost Control/Analysis	70 =	66
Estimating	69 <	78
Accounting/Payroll	68 <	80
Procurement	63 =	63
Scheduling Service Work/Logistics	61 =	59
Time and Attendance Software	61 =	60
Project Management	59 =	59
Take-Off	58 =	57
Productivity Software	56 <	72
Tool/Equipment Inventory Control	51 =	45
Workforce Management	49 =	51
Project Collaboration Software	42 =	40
Fleet Management/Vehicle Locator	40 =	34
Pre-Fab Detailing	31 =	26
CAD	30 =	37
BIM (Building Information Modeling)	23 =	26
Geospatial Mapping	20 =	19

As noted in the previous page, overall, about 8 in 10 (82%) of the electrical contracting firms we surveyed make use of one or more of the types of software included in the 2024 Profile Study. Use of Any of these types of software is substantially and significantly higher among larger firms than among their smaller counterparts (88% vs. 76%).

- Larger firms are more likely than their smaller counterparts to currently use each of the different types of software shown on the next page. As a consequence, they are also more likely to currently use 8 or more types of software compared with firms with 1-9 employees.
- Similarly, firms that derive more than one half of their revenue from CII projects are also more likely than firms that work primarily on residential projects to currently use each of the types of software included in the survey. Note that firms that work primarily on CII projects tend to be larger.
- To the extent that there are differences by age, older respondents—those aged 65 or older—are less likely than respondents aged 35-54 to make use of these types of software.

The most frequently cited types of business functions or activities that are “handled internally, using a computer are”: Job Cost Control/Analysis (70%), Estimating (69%), Accounting/Payroll (68%), Procurement (63%), Scheduling Service Work/Logistics (61%), Time and Attendance (61%), Project Management (59%), Take-Off (58%), Productivity Software (56%), Tool/ Equipment Inventory Control 51% and Workforce Management (49%).

Computer Software/Technologies Company Currently Uses (2024)								
	Based on “Handled Internally, Using a Computer” (V8), Q14A							
	Total	Number of Employees		Firm Works Primarily In		Respondent Age		
		1-9	10+	Residential	CII	35-54	55-64	65+
	(142)	(66)	(76)	(50)	(78)	(37)	(53)	(48)
	%	%	%	%	%	%	%	%
ANY	82	76	< 88	76 =	86	-	-	-
Job Cost Control/Analysis	70	56	< 82	60	< 77	-	-	-
Estimating	69	59	< 78	64 =	74	-	-	-
Accounting/Payroll	68	52	< 82	56	< 73	-	-	-
Procurement	63	47	< 78	42	< 77	-	-	-
Scheduling Service Work/Logistics	61	53	< 68	56 =	60	-	-	-
Time and Attendance Software	61	44	< 75	46	< 68	70 >	-	-
Project Management	59	41	< 75	50	< 68	70 >	-	-
Take-Off	58	39	< 74	44	< 65	70 >	-	-
Productivity Software	56	36	< 74	44	< 66	-	-	-
Tool/Equipment Inventory Control	51	32	< 67	30	< 60	-	-	-
Workforce Management	49	33	< 62	34	< 58	-	-	-
Project Collaboration Software	42	17	< 63	24	< 51	-	-	-
Fleet Management/Vehicle Locator	40	20	< 58	26	< 49	-	-	-
Prefab Detailing	31	21	< 40	18	< 39	46 >	> 21	-
CAD	30	12	< 45	12	< 37	-	-	-
BIM (Building Info Modeling)	23	15	< 29	12	< 27	-	-	-
Geospatial Mapping	20	12	< 36	14 =	21	-	-	-
Only 1 Type	5	9 >	1.3	6	4	-	-	-
2-3 Types	5	8 =	2.6	6	4	0 <	9 >	-
4 -7 Types	14	20 >	9	22 >	9	-	-	-
8+ Types	59	39	< 75	42	< 69	-	-	-
None/Don't Know/No Answer	17	24 >	12	24 =	14	-	-	-

For age breaks: Only significant differences are shown; Empty cells indicate no difference from total