# TECHNOLOGY

## Its position and impact on Surveying

RICS®

SOCIETY OF CHARTERED SURVEYORS IRELAND

THE SURVEY ASSOCIATION

GoReport®

# Introduction

In 2018 the first survey report was published that focused on the position and impact of PropTech on surveying, see **here**. The responses provided useful intelligence that shaped future content of events, conferences, journal articles, webinars and training.

Over the last 2 years the pace of technological change that is powering the digitisation of the built environment has continued to increase, requiring us to think strategically about how we deploy our expertise and resource. Surveyors need to be positioned centrally to add credibility to bridge between the technology sector and the surveying profession to ensure technology is an enabler to augment their knowledge, skills, expertise, and reflective thought. Technology is no longer an optional extra, without it Surveyors may find it more challenging to compete, be productive and add maximum client value.

As we highlighted in the last survey, technology presents both opportunities and threats to those working within the built environment. Circumstances and opinions can change rapidly when it comes to technology, so we decided the time was right to reach out to the industry to gain a fresh perspective of the professions position on technology.

Comparing the headline figures of the 2018 and 2020 survey has provided a positive picture of the direction of travel. In 2018 we received 303 responses, this time we increased this by over 50% to 476 providing a more full and robust set of data.

Those using PropTech has increased from 60% to 68%, those with a digital strategy in place or working on one was 57% now it is 79%, those with a good understanding of PropTech is up from 43% to 52%, those with the necessary skills and expertise to fully embrace PropTech has increased from 40% to 48%, and those who see PropTech as an opportunity has risen from 95% to 98% – almost all of those who responded. Whilst there is still more to do across the profession, the responses to the survey indicate there is an appetite to increase adoption of technology.

The publication of the 2020 report gives clarity on the main challenges ahead and provides a useful future reference point. In addition, we have created a Business Intelligence dashboard to enable more detailed analysis of the responses see **here**.

A huge thank you to the Royal Institution of Chartered Surveyors, The Society of Chartered Surveyors of Ireland and The Survey Association who helped with the creation of the questionnaire and to GoReport for their contribution and management of the survey and for the production of the report and dashboard.

Should you wish to discuss any aspect of this report, contact details of all those involved can be found at the back of this document.

# **Executive** Summary

**476**
RESPONSES

**75**%
AGE
25 – 54
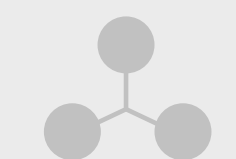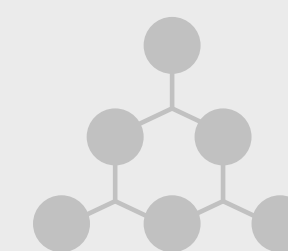
**95**%
UK
& IRELAND

**85**%
MALE

**15**%
FEMALE

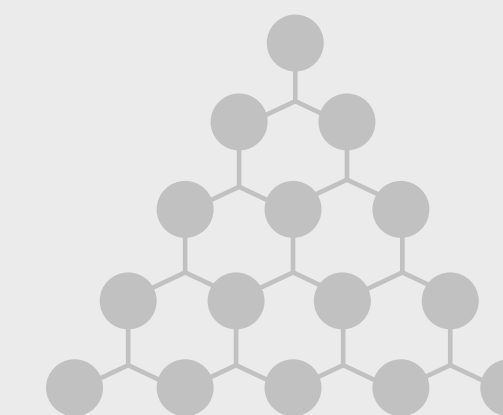SIZE OF ORGANISATION

MICRO
**38**%

SMALL
**14**%

MEDIUM
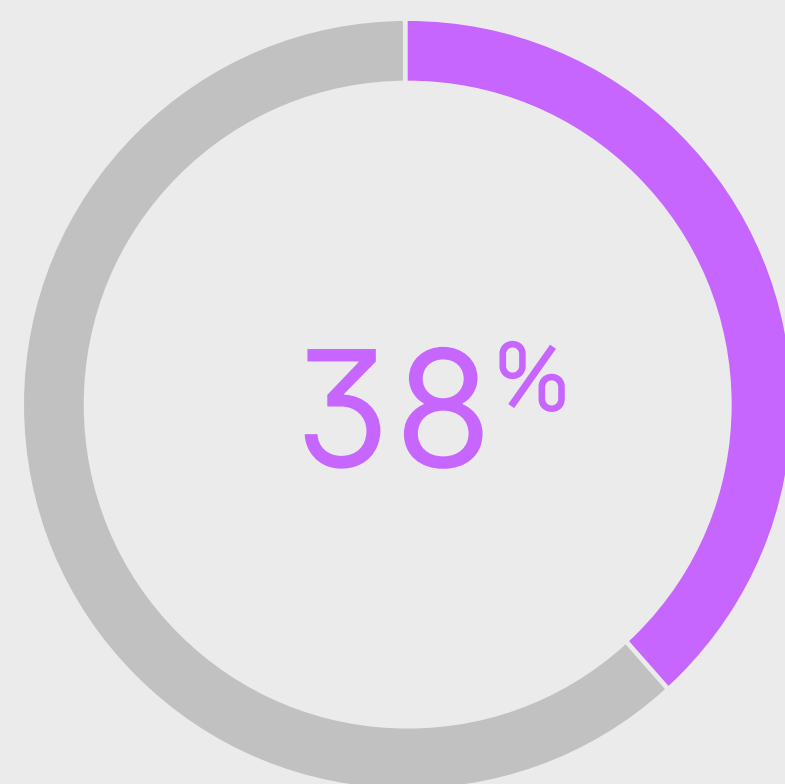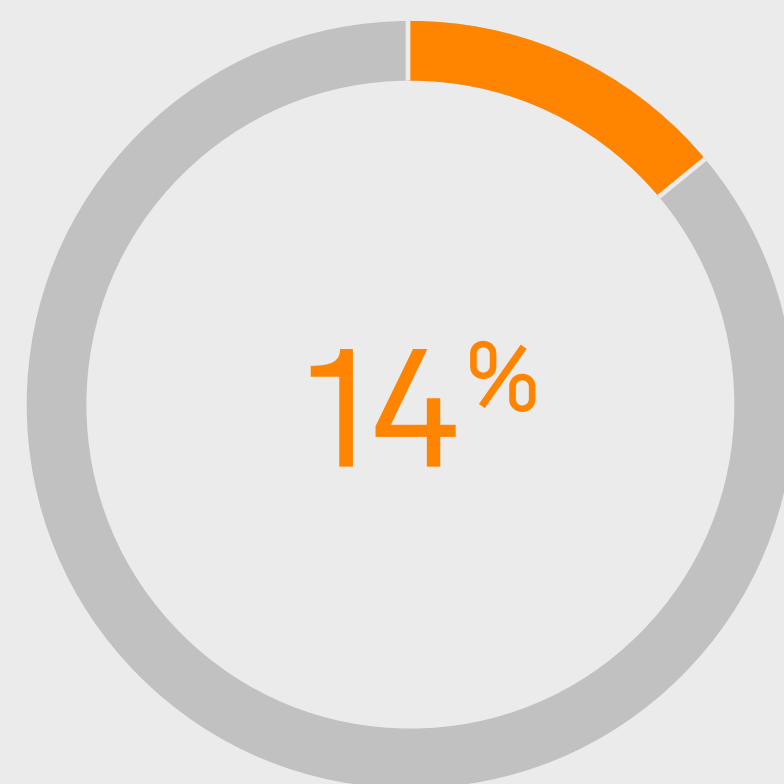**16**%

LARGE
**32**%

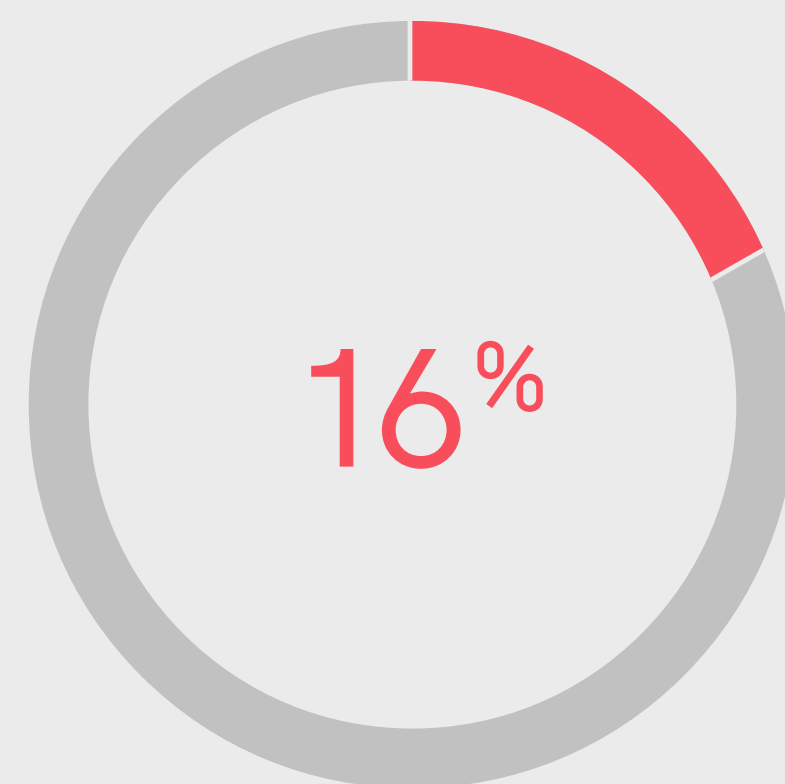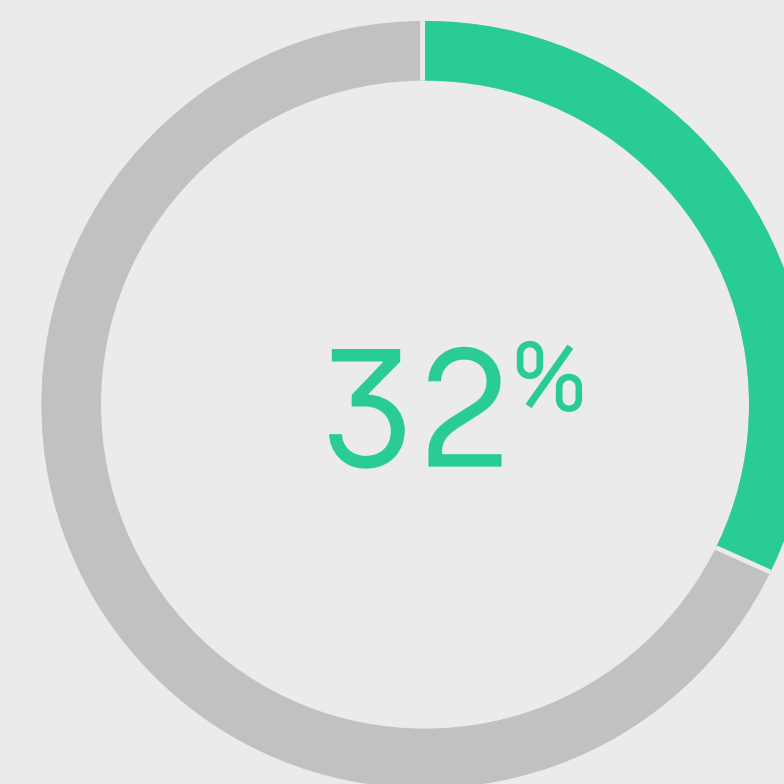# 01 What is the **size** of the organisation you work for?

**38%**

**14%**

**16%**

**32%**

MICRO <10

SMALL <50

MEDIUM <250

LARGE >250

## 02 What is your **gender**?

**15%** FEMALE

**85%** MALE

# 03 What is your **age**?

– 24   5%

25 – 34   26%

35 – 44   25%

45 – 54   24%

55 – 64   16%

65 +   4%

0    20    40    60    80    100
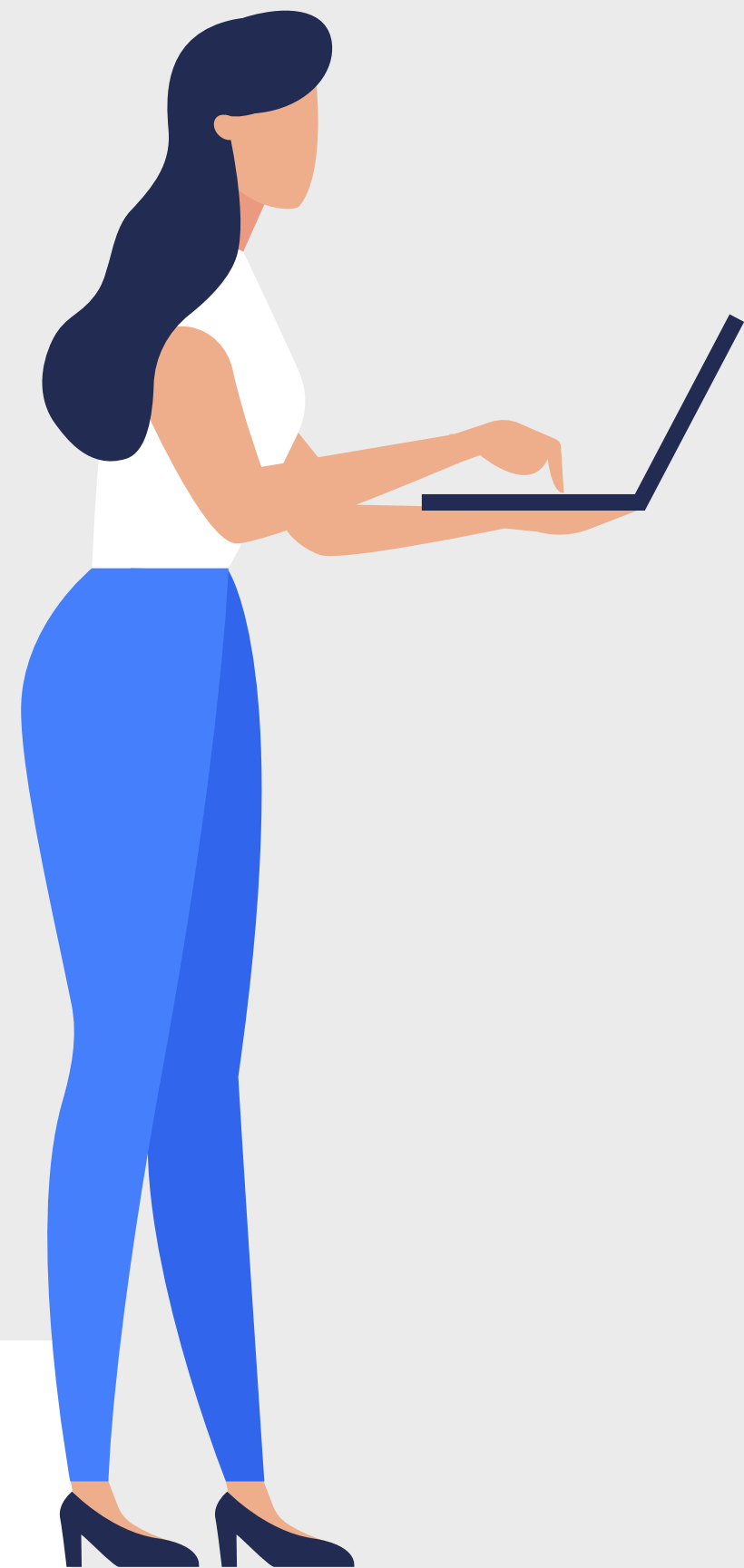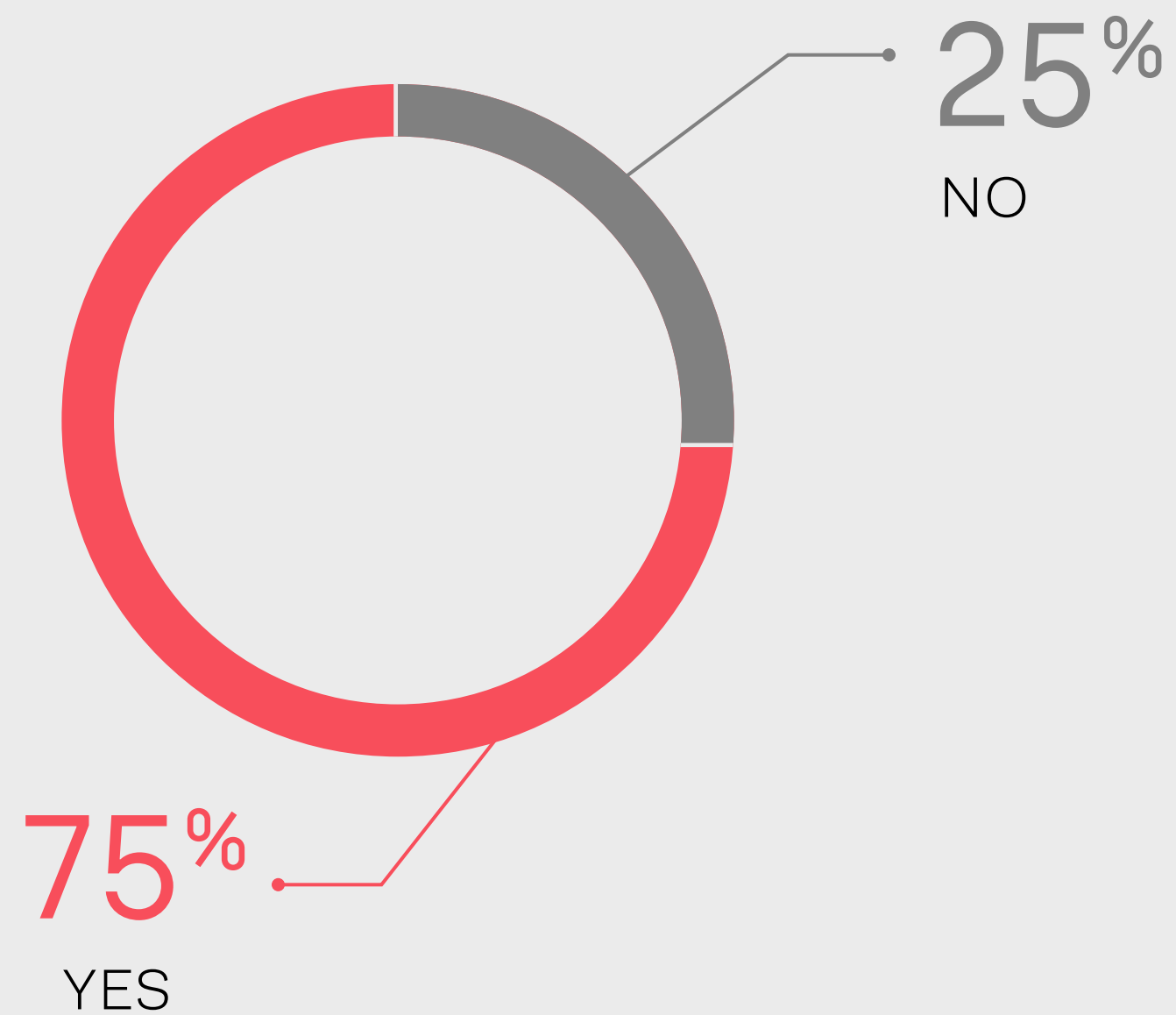
PERCENTAGE (%)
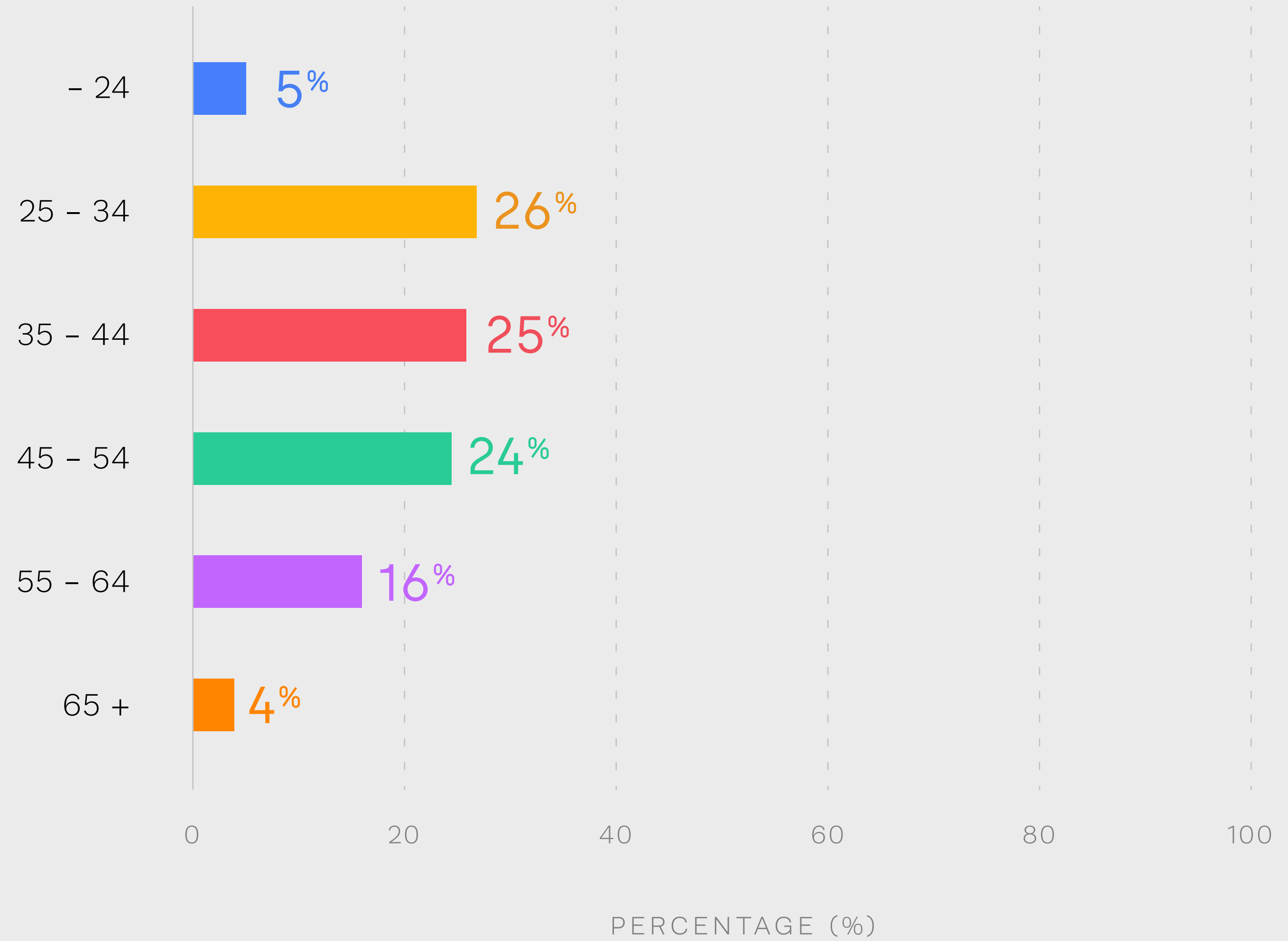
# 04 What is your **region**?

- ● EAST ANGLIA
- ● EAST MIDLANDS
- ● LONDON
- ● NORTH
- ● NORTH WEST
- ● NORTHERN IRELAND
- ● ROI

- ● SCOTLAND
- ● SOUTH EAST
- ● SOUTH WEST
- ● WALES
- ● WEST MIDLANDS
- ● YORKSHIRE & HUMBERSIDE

1% AMERICAS

3% EUROPE
(OTHER THAN UK & ROI)

1% AUSTRALASIA

1% SUB-SAHRAN AFRICA

5%
3%
2%
7%
6%
11%
5%
6%
6%
2%
19%
10%
12%

## 5a Are you a member of the **Royal Institution of Chartered Surveyors**?



25%
NO

75%
YES

## 5b If **Yes** what **Professional Group** are you a member of?

| | | | |
|---|---|---|---|
| 65%<br>BUILDING SURVEYING | 8%<br>COMMERCIAL PROPERTY | <1%<br>ENVIRONMENT & RESOURCES | <1%<br>FACILITIES MANAGEMENT |
| <1%<br>GEOMATICS | <1%<br>MANAGEMENT CONSULTANCY | <1%<br>PLANNING & DEVELOPMENT | <1%<br>PROJECT MANAGEMENT |
| 4%<br>QUANTITY SURVEYING & CONSTRUCTION | 9%<br>RESIDENTIAL PROPERTY | 2%<br>RURAL | 8%<br>VALUATION |

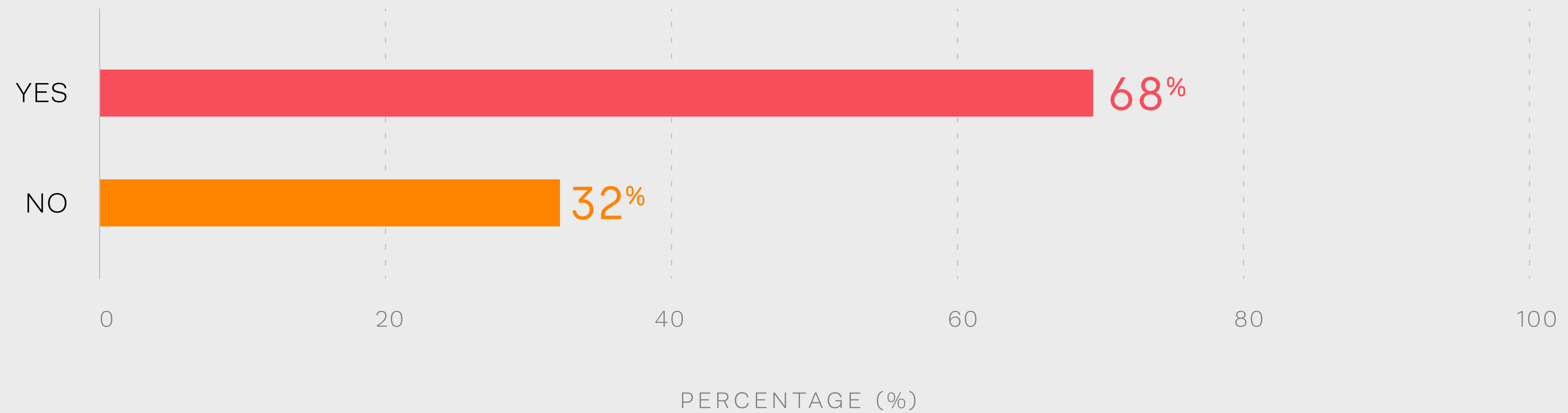## 6a Are you a member of the **The Survey Association**?

98<sup>%</sup>

NO

2<sup>%</sup>

YES
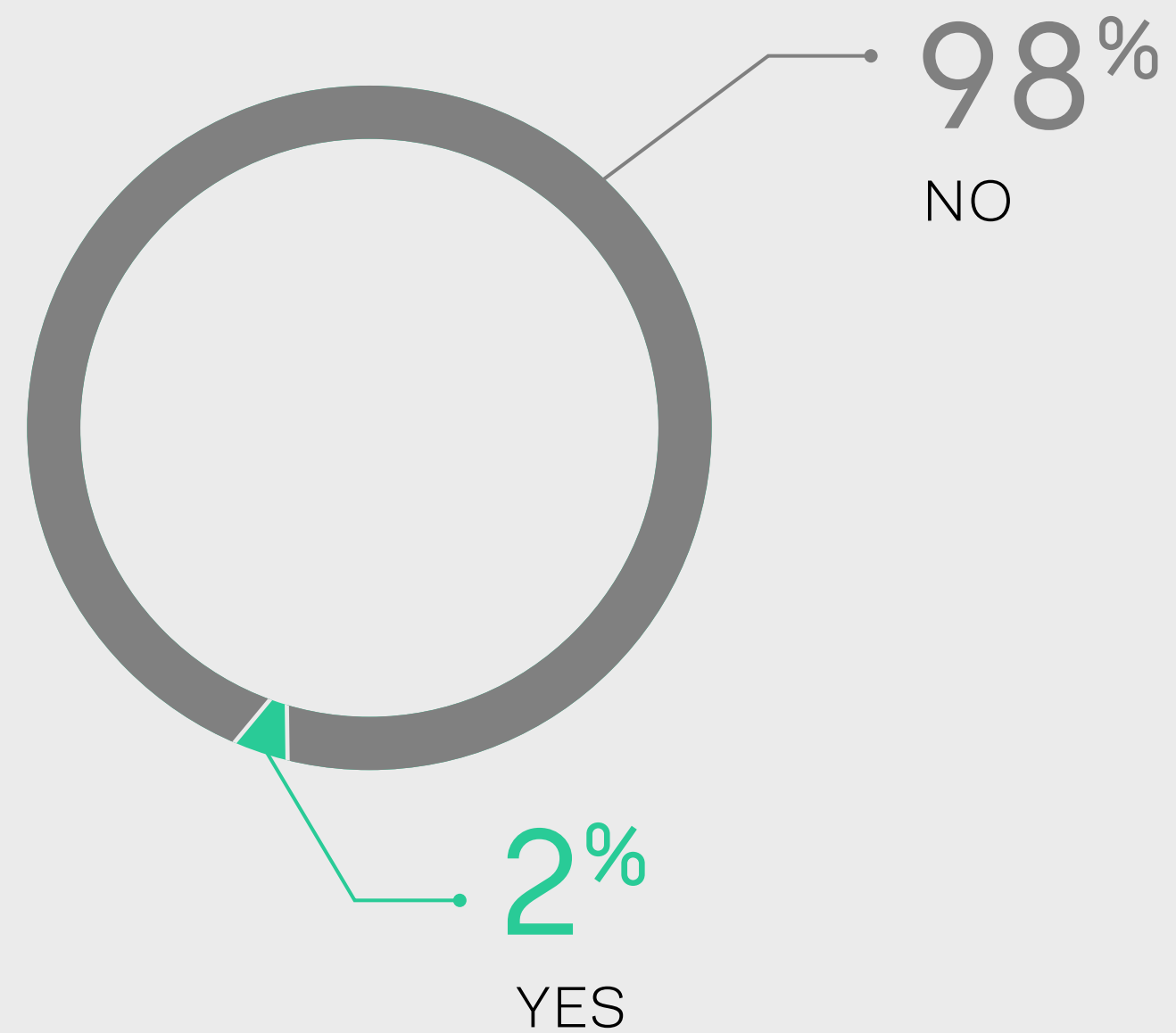
## 6b If **Yes** what **Professional Group** are you a member of?

88<sup>%</sup>
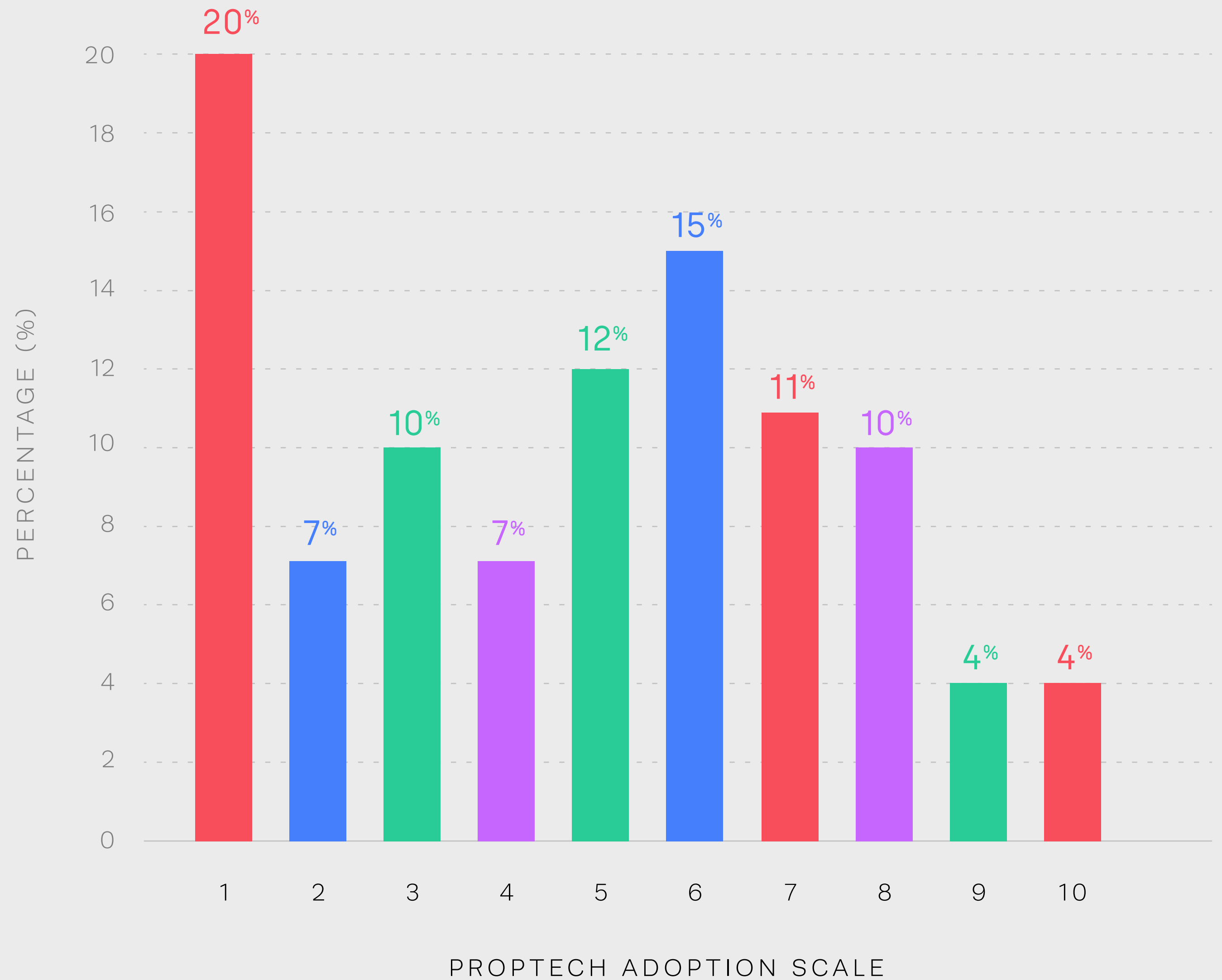
FULL

12<sup>%</sup>

SUPPLIER
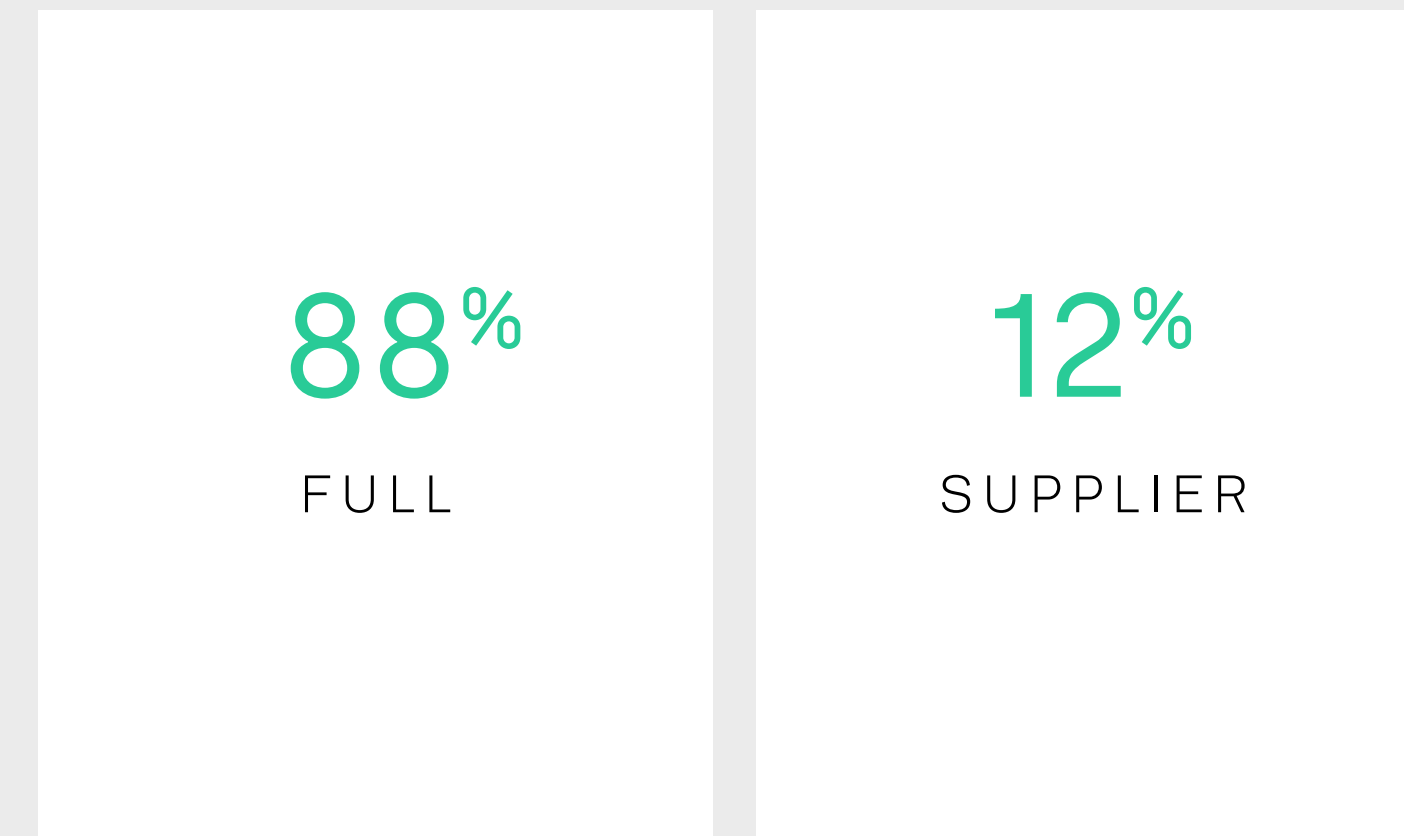
# 07 Are you using **PropTech**?

As defined as all aspects of innovation and how this impacts the built environment. This includes software, hardware, materials or manufacturing.

**YES** ████████████████████ **68**%

**NO** █████████ **32**%

0          20          40          60          80          100
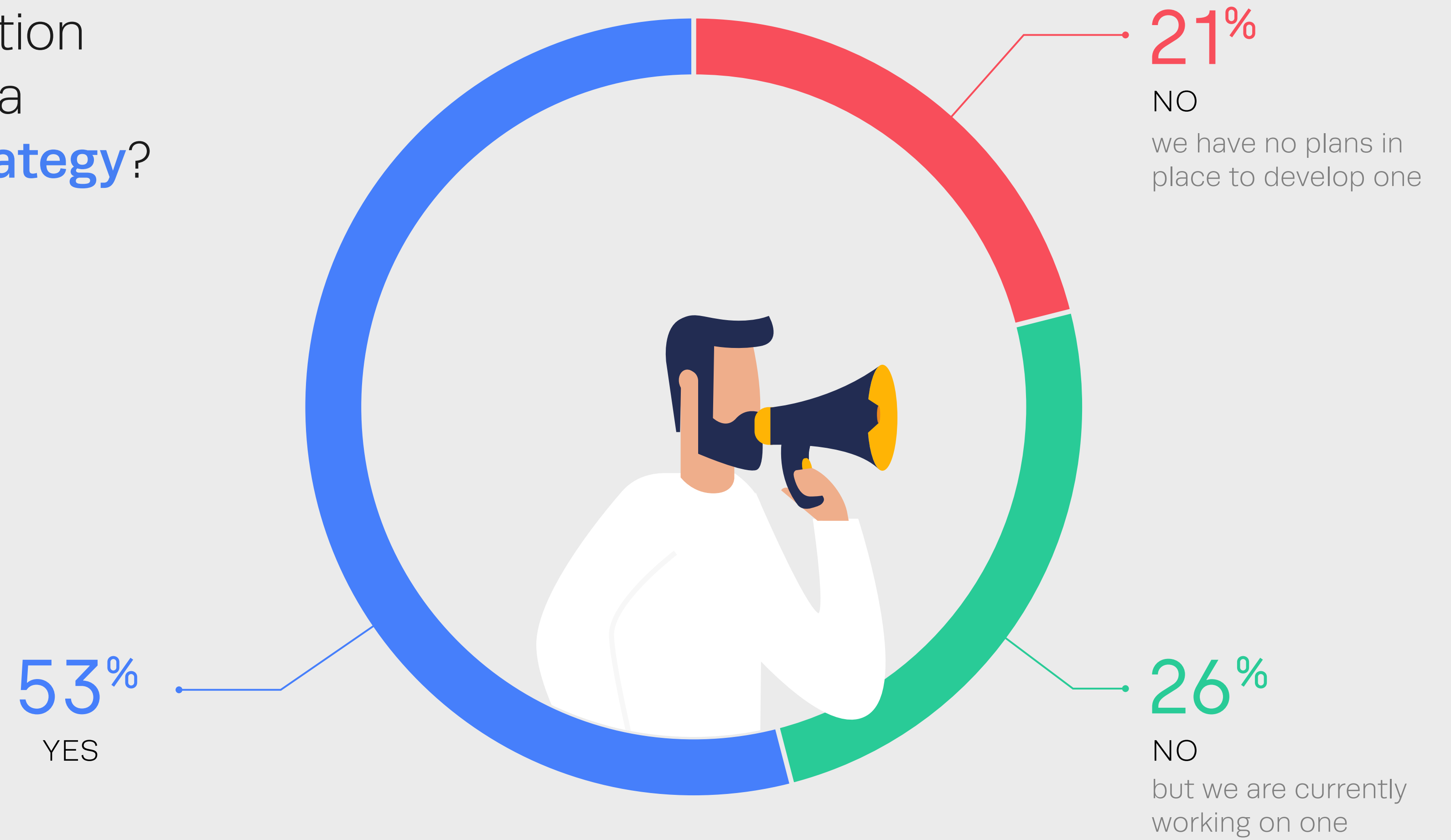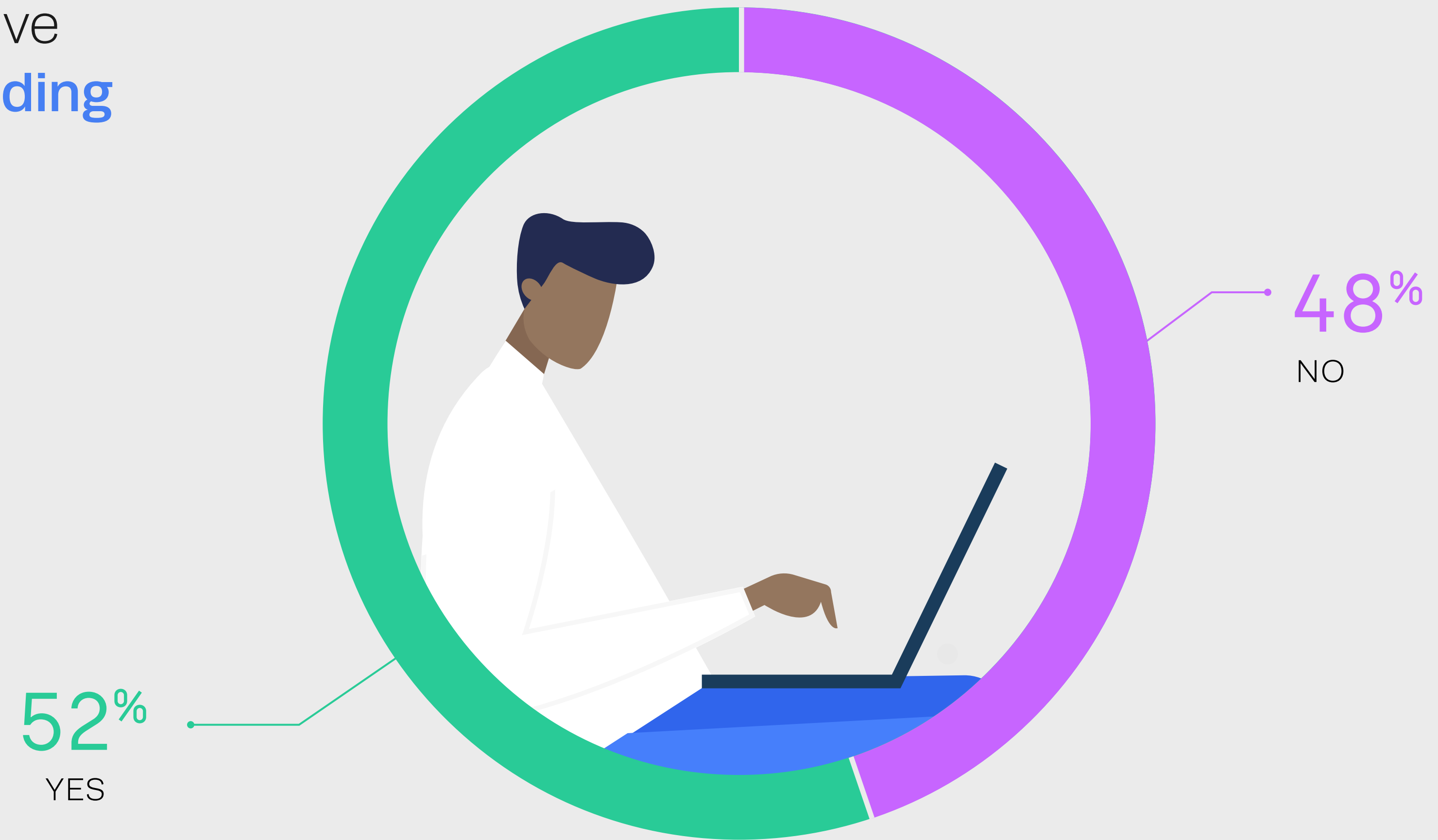
PERCENTAGE (%)

# 08

Where would you rank your organisation with regards to **PropTech adoption** across every work stream and service, on a **scale of 1–10**, where 1 is no adoption and 10 is fully adopted?



PERCENTAGE (%)

20%  7%  10%  7%  12%  15%  11%  10%  4%  4%

PROPTECH ADOPTION SCALE

09 Does the organisation you work for have a **digital** or **data strategy**?

21% NO
we have no plans in place to develop one

26% NO
but we are currently working on one

53% YES

# 10

## Do you feel you have a **good understanding** of **PropTech**?
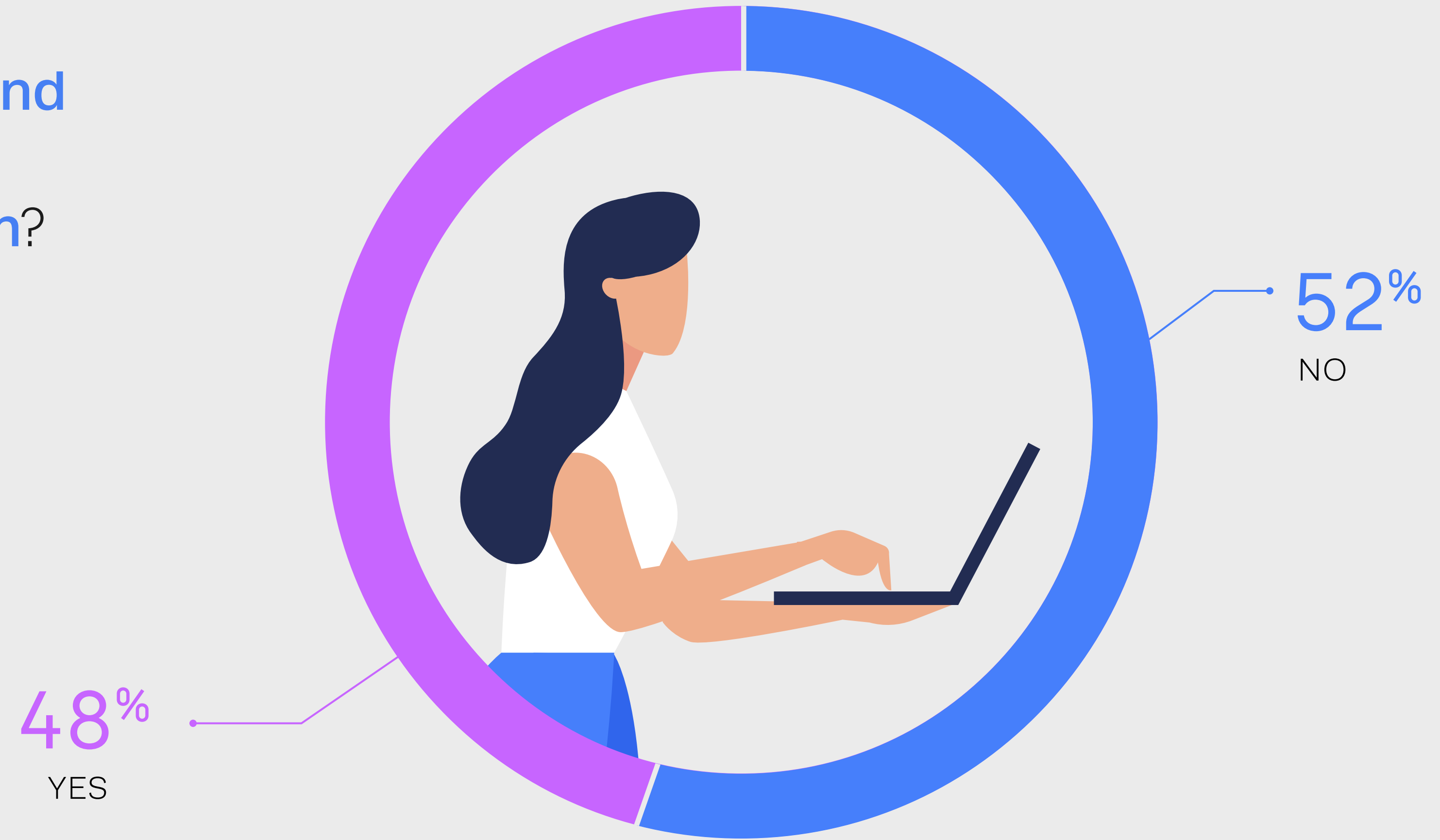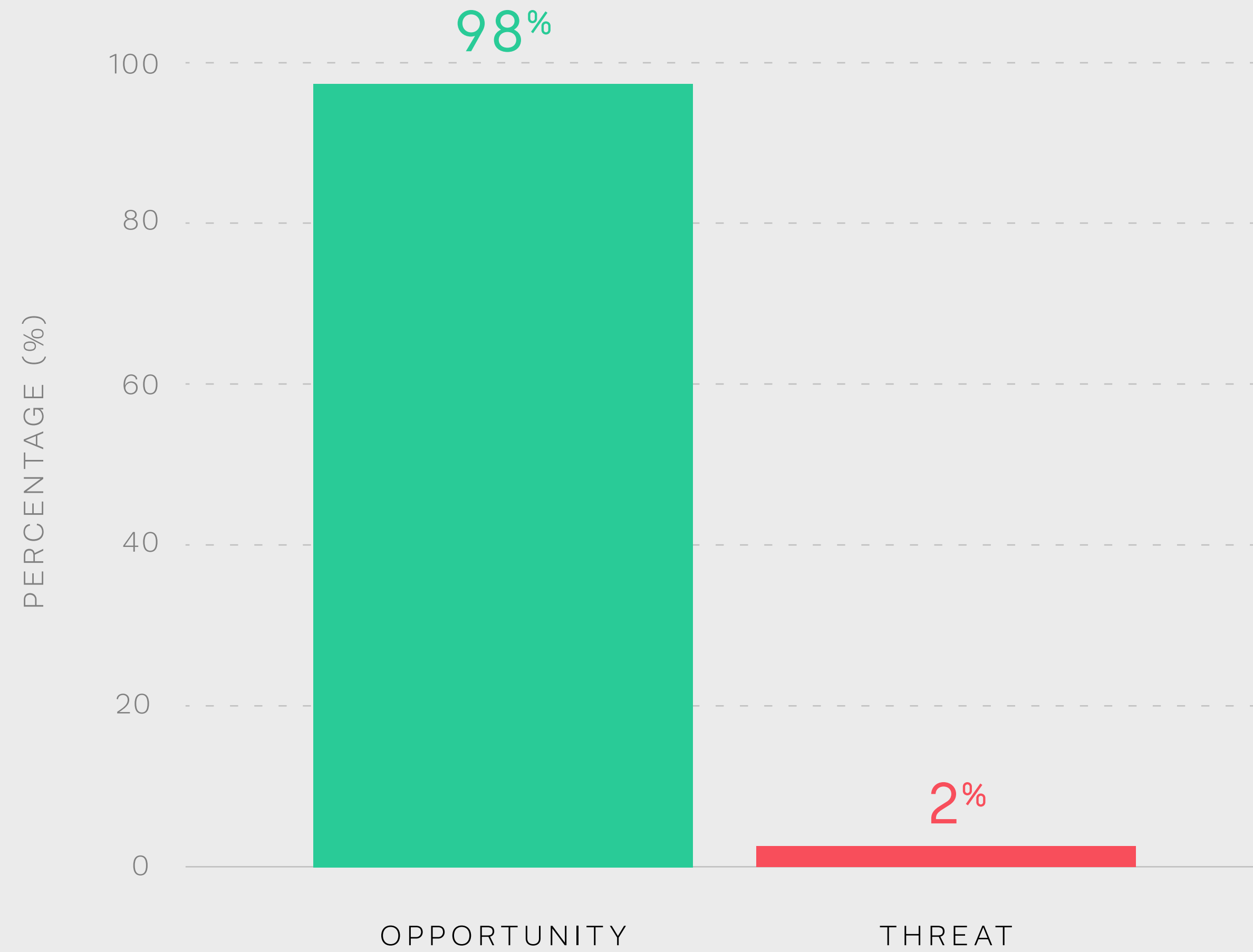
48%
NO

52%
YES

# 11

## Does the organisation you work for **invest heavily** in **PropTech** and **related training**?



61%
NO

39%
YES

# 12

Do you have the **necessary skills and expertise** to fully embrace **PropTech**?

**52%**
NO

**48%**
YES

# 13

## In relation to your role do you see **PropTech** as an **opportunity** or **threat**?



98%

2%

PERCENTAGE (%)

100

80

60

40

20

0

OPPORTUNITY

THREAT

# 14 Do you use any **Business Intelligence software** to carry out analysis of your data?

YES ▬▬▬▬▬ 21%

NO ▬▬▬▬▬▬▬▬▬▬▬▬▬ 79%

0   20   40   60   80   100

PERCENTAGE (%)
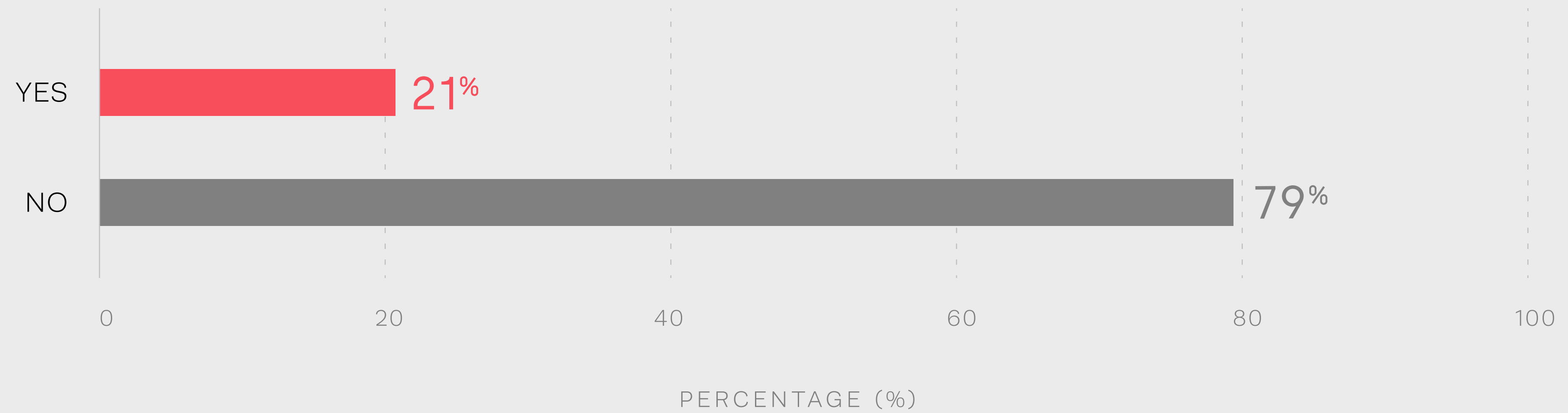
## 15 Will **PropTech** increase productivity?

| 31% | 52% | 4% | <1% | 13% |
|---|---|---|---|---|
| STRONGLY AGREE | AGREE | DISAGREE | STRONGLY DISAGREE | DOES NOT APPLY TO ME |
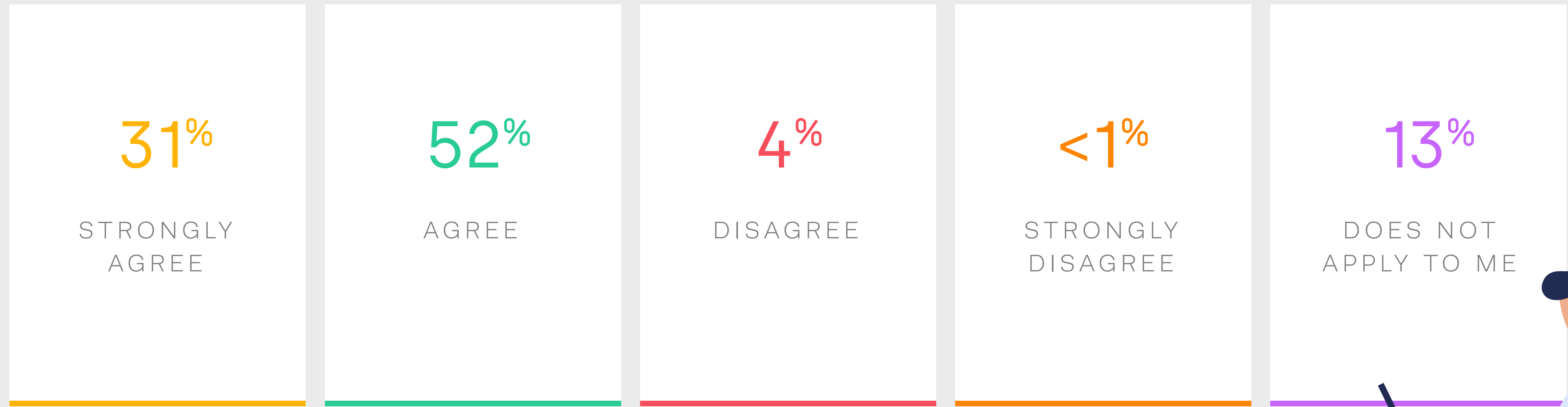
# 16 What are the challenges holding back wider adoption of **PropTech**?

**39%**
HAPPY WITH TRADITIONAL METHODS

**38%**
LACK OF CLARITY ON THE BENEFITS

**26%**
LACK OF COMPATIBILITY WITH EXISTING IN–HOUSE TECHNOLOGY

**40%**
TIME REQUIRED TO IMPLEMENT

**12%**
TRIED IT PREVIOUSLY & HAD ISSUES

**32%**
UNSURE WHICH SOLUTION / TOO MANY OPTIONS

**38%**
UNSURE ON ROI (RETURN ON INVESTMENT)

**15%**
LIMITATIONS OF TECHNOLOGY

**47%**
LACK OF TRAINING / KNOWLEDGE

**5%**
THERE ARE NO CHALLENGES

**22%**
LACK OF DIGITAL LEADERSHIP FROM MANAGEMENT

**33%**
FEAR OF CHANGE

**39%**
COST/LACK OF FUNDS

19

# 17 What do you think will be the **major challenges** facing the sector and its increased reliance on data?

Ranked in order, 1 being the lowest challenge and 5 the highest challenge.

| | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| ACCESS TO DATA | **37%** | 22% | 17% | 16% | 8% |
| DATA EXISTS IN SILOS | 21% | **33%** | 16% | 12% | 18% |
| QUALITY OF DATA | 19% | 20% | **27%** | 17% | 17% |
| DATA OWNERSHIP ISSUES | 9% | 16% | 24% | **38%** | 13% |
| PRIVACY & ETHICAL USE OF DATA | 8% | 17% | 17% | 13% | **45%** |

SCALE OF CHALLENGE (RANKED 1–5)

20
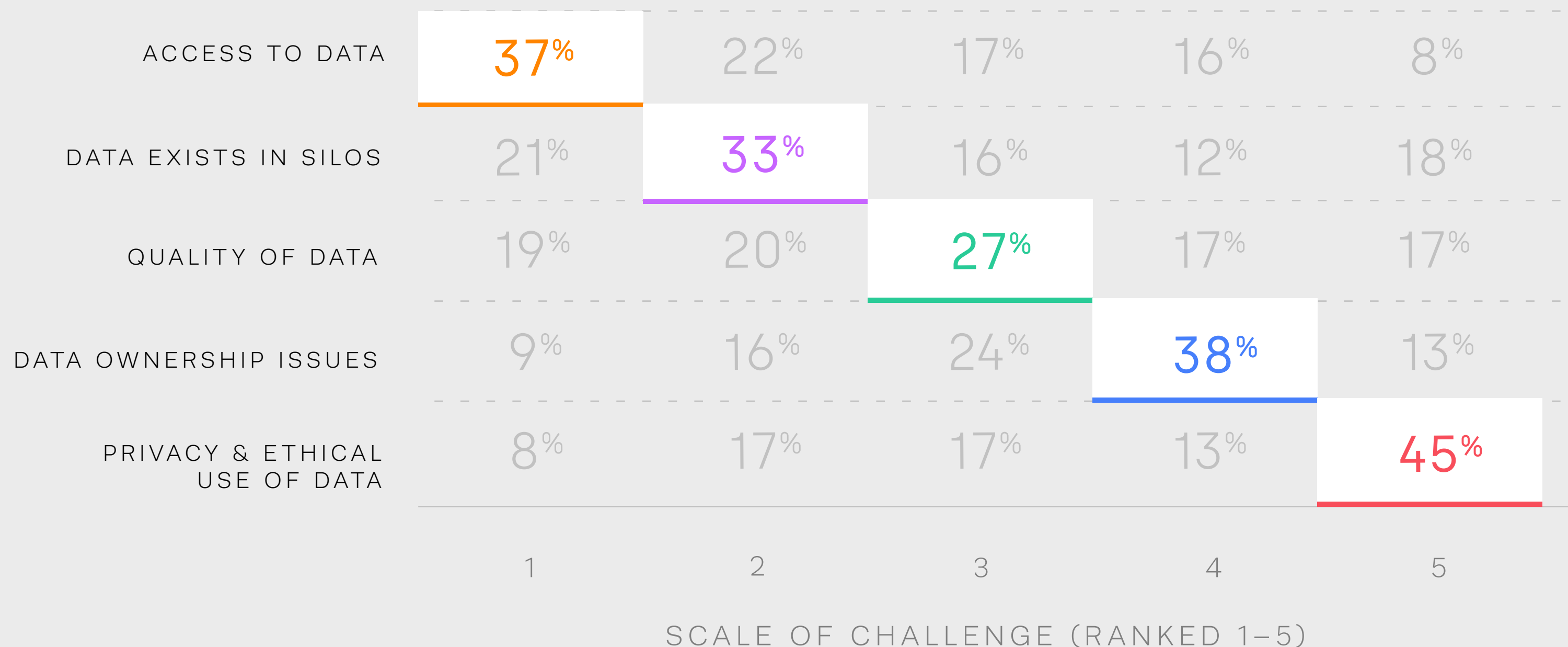
# 18

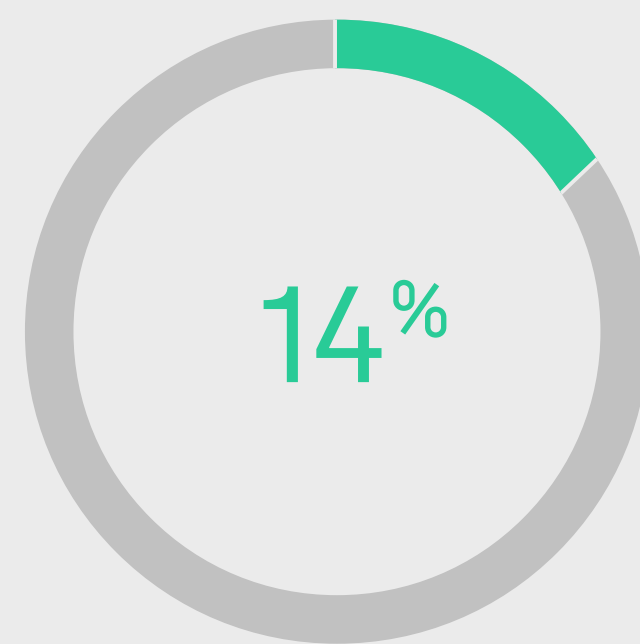## Do you feel your organisation is **well positioned** to leverage maximum value and insights from its data?

47%
NO

53%
YES
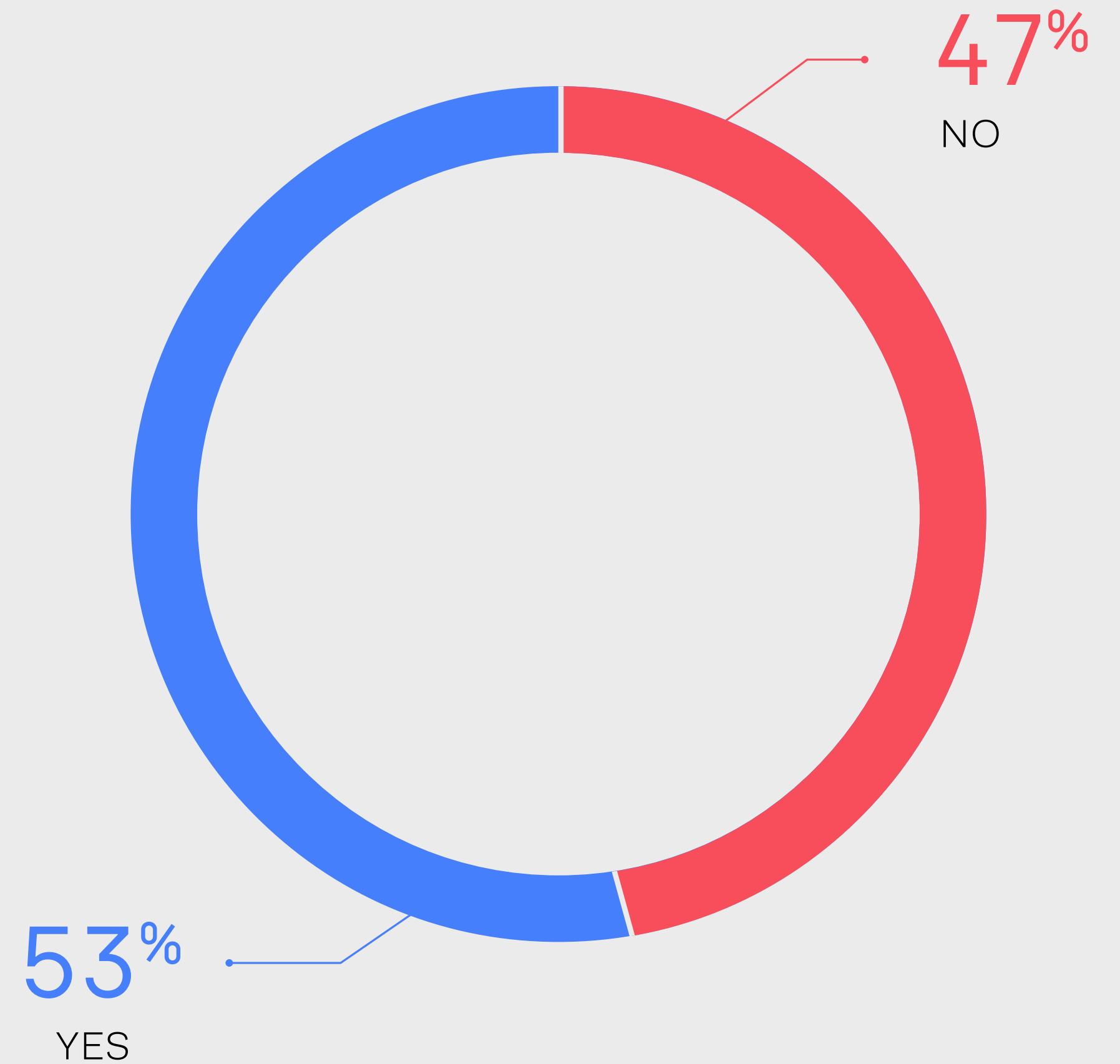
19 The **ethical use of data** within the sector will be a significant issue in the future
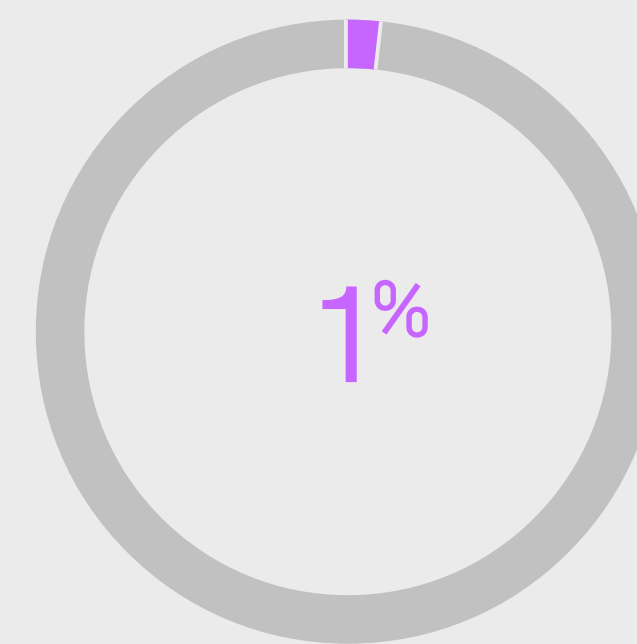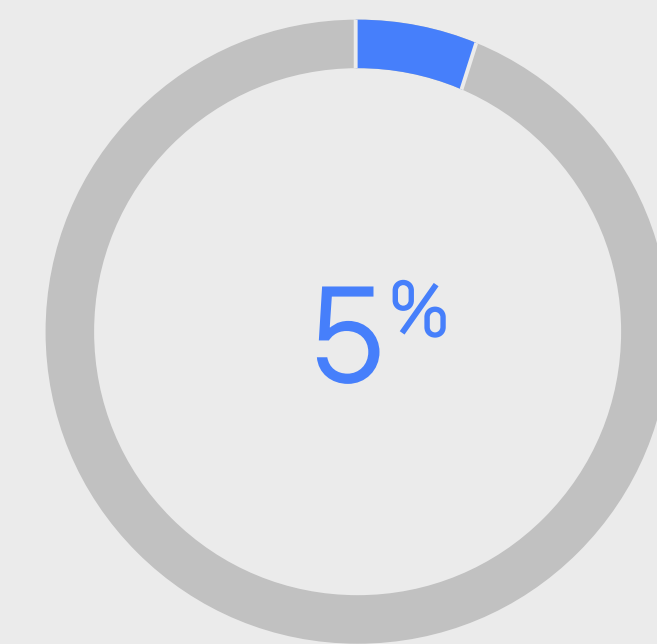
26%
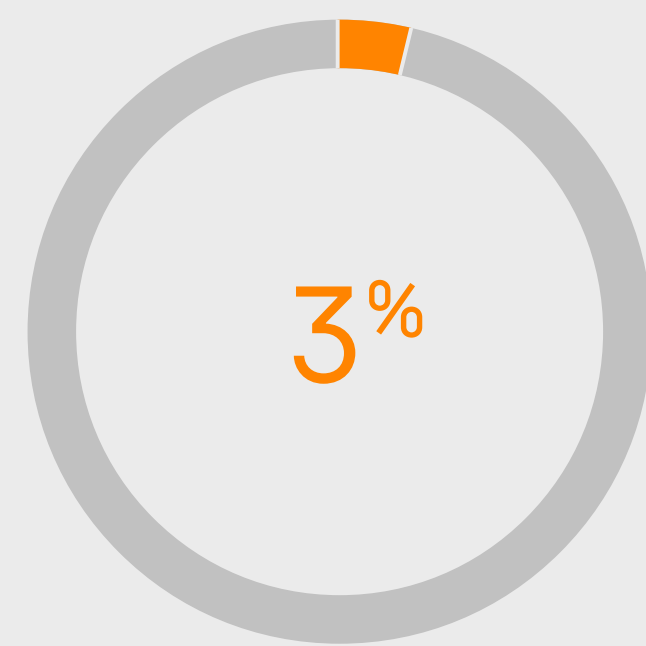
54%

14%

1%

5%
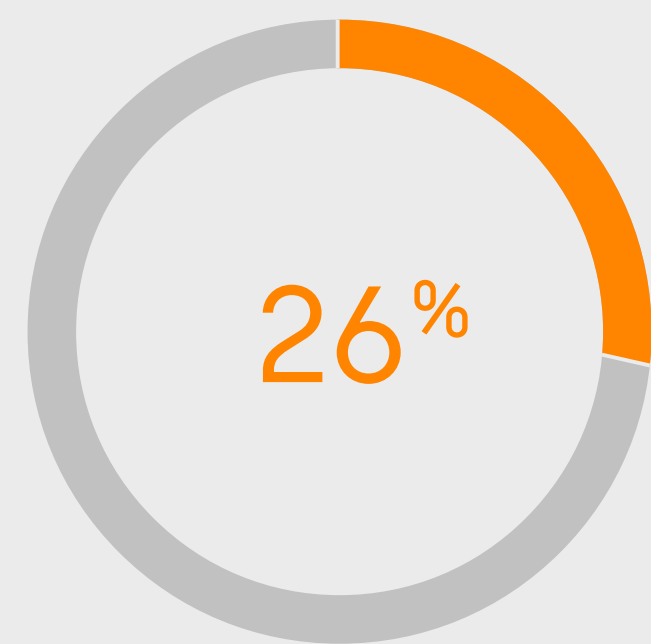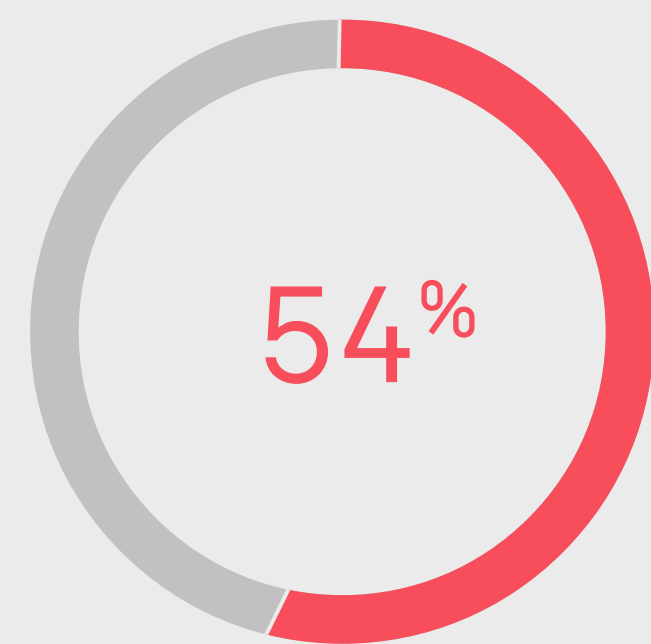
STRONGLY AGREE

AGREE

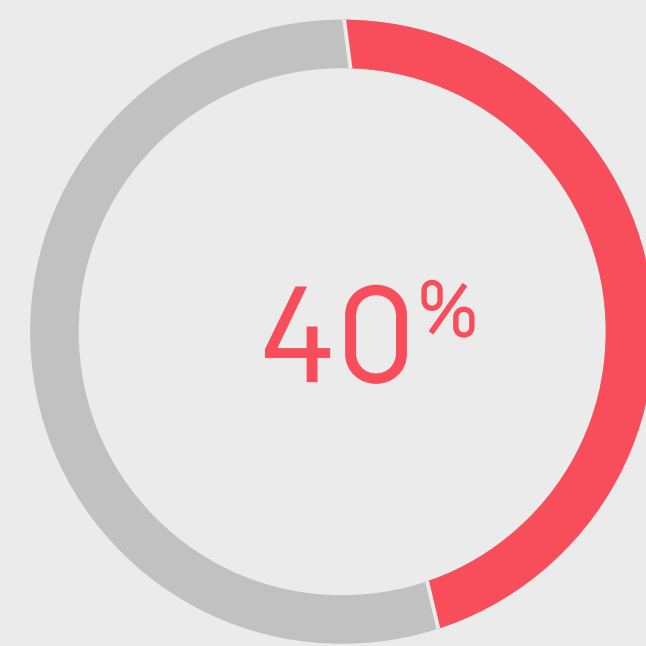DISAGREE

STRONGLY DISAGREE

DOES NOT APPLY TO ME

# 20 The sector has done enough to **ensure the ethical use of data**.
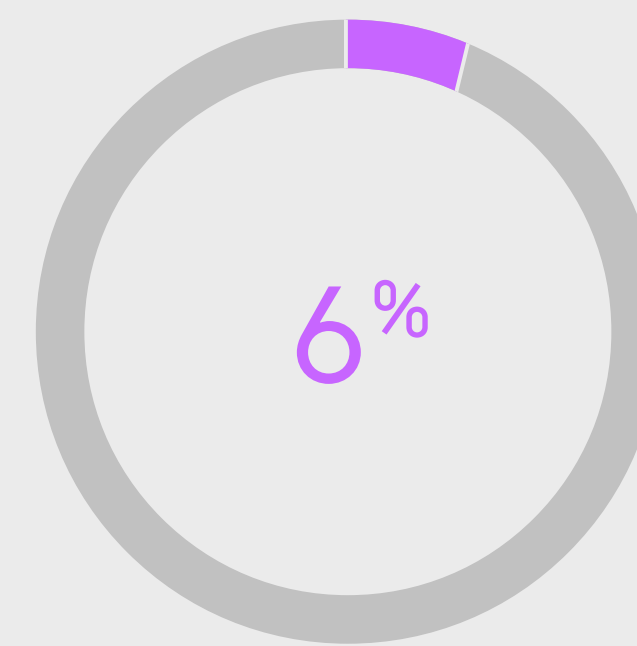
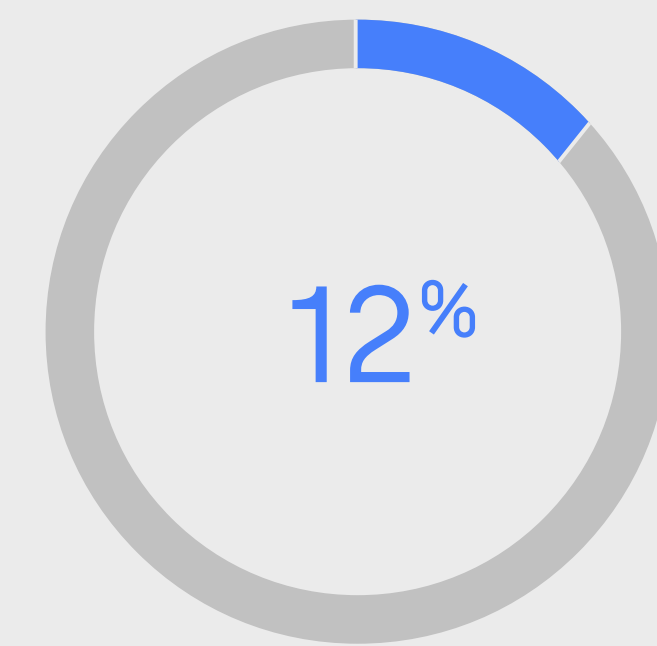**3%**
STRONGLY AGREE

**40%**
AGREE

**39%**
DISAGREE

**6%**
STRONGLY DISAGREE
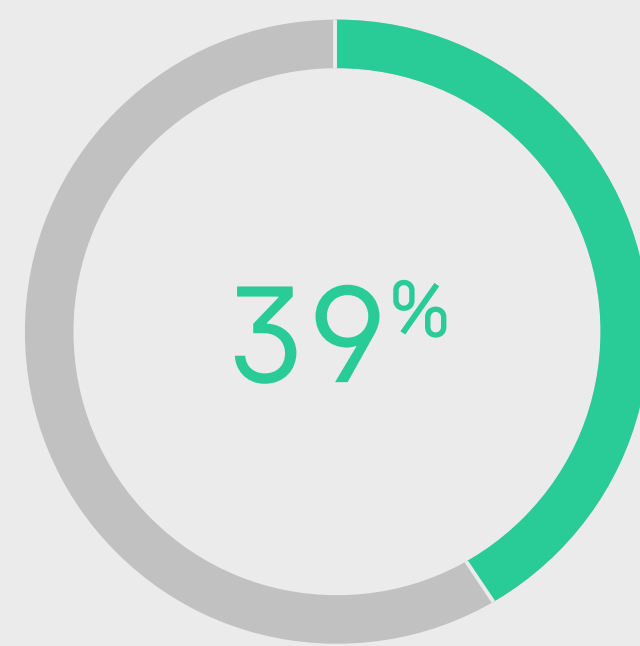
**12%**
DOES NOT APPLY TO ME

# Business Intelligent Dashboard Results

For a more interactive experience and in depth analysis of the responses click on our Business Intelligence Dashboard here.

# Andrew Knight

ROYAL INSTITUTION OF CHARTERED
SURVEYORS INTERNATIONAL DATA
STANDARDS DIRECTOR

"

RICS is delighted to support this survey,
it's clear that the real estate industry understands
the value and importance of using technology,
and RICS will continue to support the profession
to gain the skills and knowledge to allow a step
change in the adoption of the range of solutions
and tools already available.  RICS' Data Standards
are now supporting the ability to share real estate
data across market participants in a controlled
and consistent way, and our Tech Affiliate
Programme, and recently launched digital
community, continue to support vibrant
engagement between the profession and the
technology sector.

The built and natural environment was already
going through a period of unprecedent structural
change and with the challenges presented by
covid–19, increased adoption technology across
the sector has the potential to provide further
resilience for the profession. "

# Edward McAuley

ASSOCIATE, SCSI ROYAL INSTITUTION
OF CHARTERED SURVEYORS
HEAD OF PRACTICE & POLICY, SCSI

"

As Surveyors, we are seeing a greater impact of
technology on our business, service delivery and
working habits year–on–year. Whilst change can
be viewed by some with trepidation, the benefits
of early adoption can be very positive for most
businesses to drive efficiency, service
improvements and more certainty for financial
planning.

Thankfully, as construction and property
professionals, our clients seek trusted advisors,
meaning that human interaction has a positive
future. The changing landscape means that
clients demand the best and latest technology so
it's important that we keep up to date with the
latest changes in our sectors.

Research such as this Technology report is a
great reminder of the journey we have taken
as individual businesses and how far yet
we have to travel. "

# Rachel Tyrrell

SECRETARY GENERAL,
THE SURVEY ASSOCIATION

" PropTech covers a broad array of software and TSA Members, geospatial professionals, are very conversant with survey processing, GPR processing, CAD, modelling software and more.

TSA were delighted to be included in the questionnaire this time around and the subsequent report. We look forward to engaging further and helping to widen the conversation. "

# David Bell

EXECUTIVE CHAIRMAN,
GOREPORT

" As a technology partner for many surveyors, we are delighted to once more contribute to the survey and gain refreshed perspective on what is important for the profession.

Since the last survey in 2018, surveyors are seeing a greater impact of technology on their business and many are actively embracing the opportunity to drive efficiency, service improvements and to make more informed decisions.

In the current climate, now more than ever we witnessing the true value of technology and the benefits of digitisation as surveyors look to find smarter and more flexible ways of working. A continuation on this journey will enable the profession to be more resilient to deliver services to clients.

The survey highlights the importance of increased information and training required for successful integration of technology into everyday working practices and the need to adopt a customer–centric flexible approach. I am optimistic this year we will see the traditional property sector make substantial strides in preparing for the future. "

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