

RICS Americas Construction Management and Project Controls Council

Survey Results

March 2010

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Introduction & Methodology

- The Construction Management & Project Controls Council conducted a member survey to provide data on how the RICS members, particularly the quantity surveyors, are working in the Americas. With this information the Council will develop 'terms of appointment' guidelines for use in the region. The data will inform the general value message used to communicate with members and prospective members from the construction professional groups.
- The survey was conducted via the Internet to some 1,500 members in the Americas region who belonged to a construction or construction-related professional group, as well as those who were not identified with any professional group.
- Some 242 members completed the survey, representing a 16% response rate.

Summary

Industry/Company

The survey results indicate that most members either work for large companies of more than 500 employees or for small companies/consultancies with fewer than 10 staff. Fully 62% of respondents are split evenly between these two categories. This might indicate that principally large companies will have in-house quantity surveyors/cost managers; and that mid-size companies are more likely to hire these professional on a contract/consulting basis.

There is a fairly high rate (41%) of respondents indicating they are the only practitioner on staff, providing evidence of the specialized nature of the competencies of the chartered surveyor.

A high percent of respondent (58%) indicated that their companies originated in North America, while just 16% are based in the United Kingdom. This result seems to counter the perception that membership in the Americas region is dominated by UK-based firms.

A high percent of respondents work for clients in 1) Development/Property Manager, 2) Government and 3) Education; with Healthcare, Manufacturing and Financial Services following. These responses indicate that that RICS skill set is most employed by large, highly-regulated projects where adherence to standards and cost controls is important.

Work Practices

The highest percentage of respondents (92%) indicated that some portion of their time was allocated to Project and Cost Control activities, with 18% indicating that 81% to 100% of their time was taken up by this activity. This implies a trend toward frequent or continual auditing processes.

A little more than half of respondents described themselves as Quantity Surveyors (51%).

Respondents are more likely to work in their immediate area than internationally. 35% indicated they perform work in and around their local region, while 20% indicated they work internationally. Another 36% said they perform work in other states/islands.

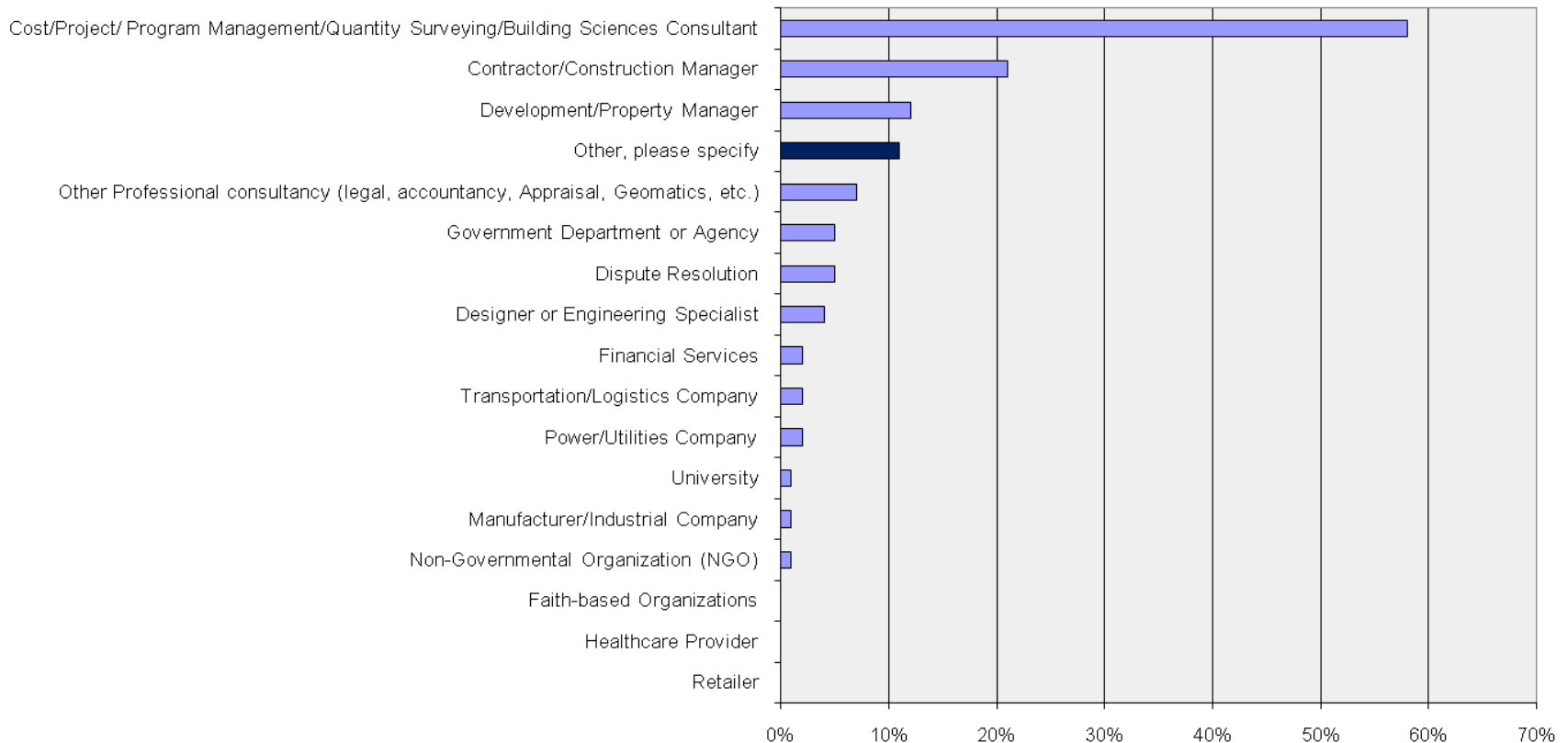
Summary (continued)

A little more than half of the respondents described themselves as Quantity Surveyors (51%).

When looking at technology, note that a high percent of respondents (71%) indicated they are involved or very involved with the use of estimating system (software). Conversely, fewer than 30% of respondents indicated they were involved with BIM Technology. Though BIM is a hot topic generally, it is still an emerging field of activity, which appropriately accounts for the small percentage of involvement indicated by the survey.

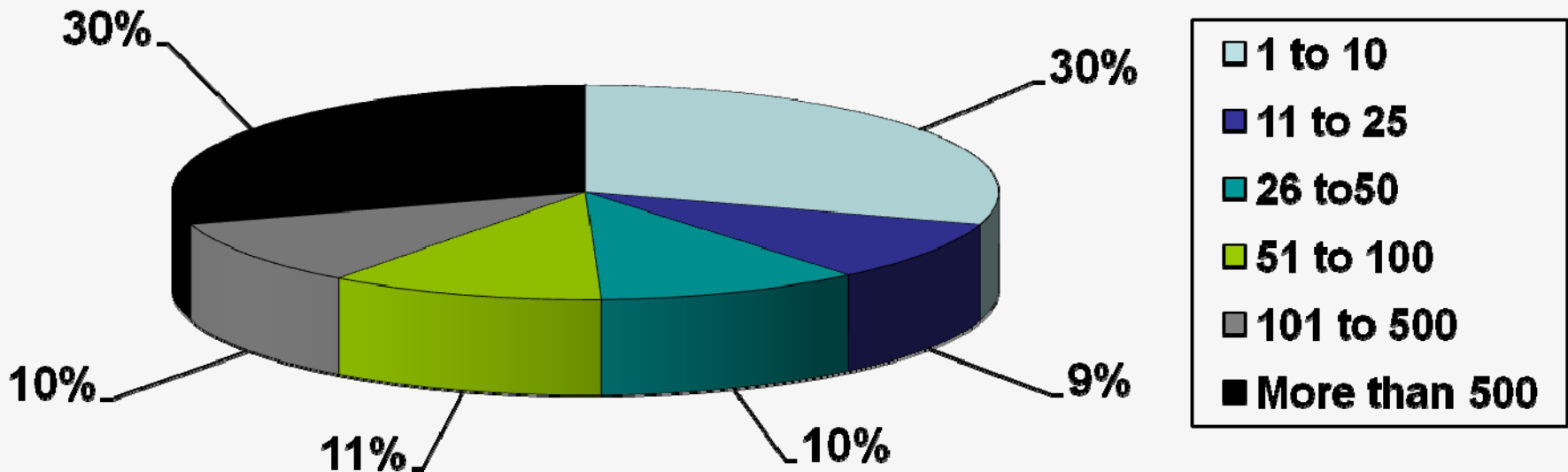
Industry/Company

For what type of company/firm do you work?



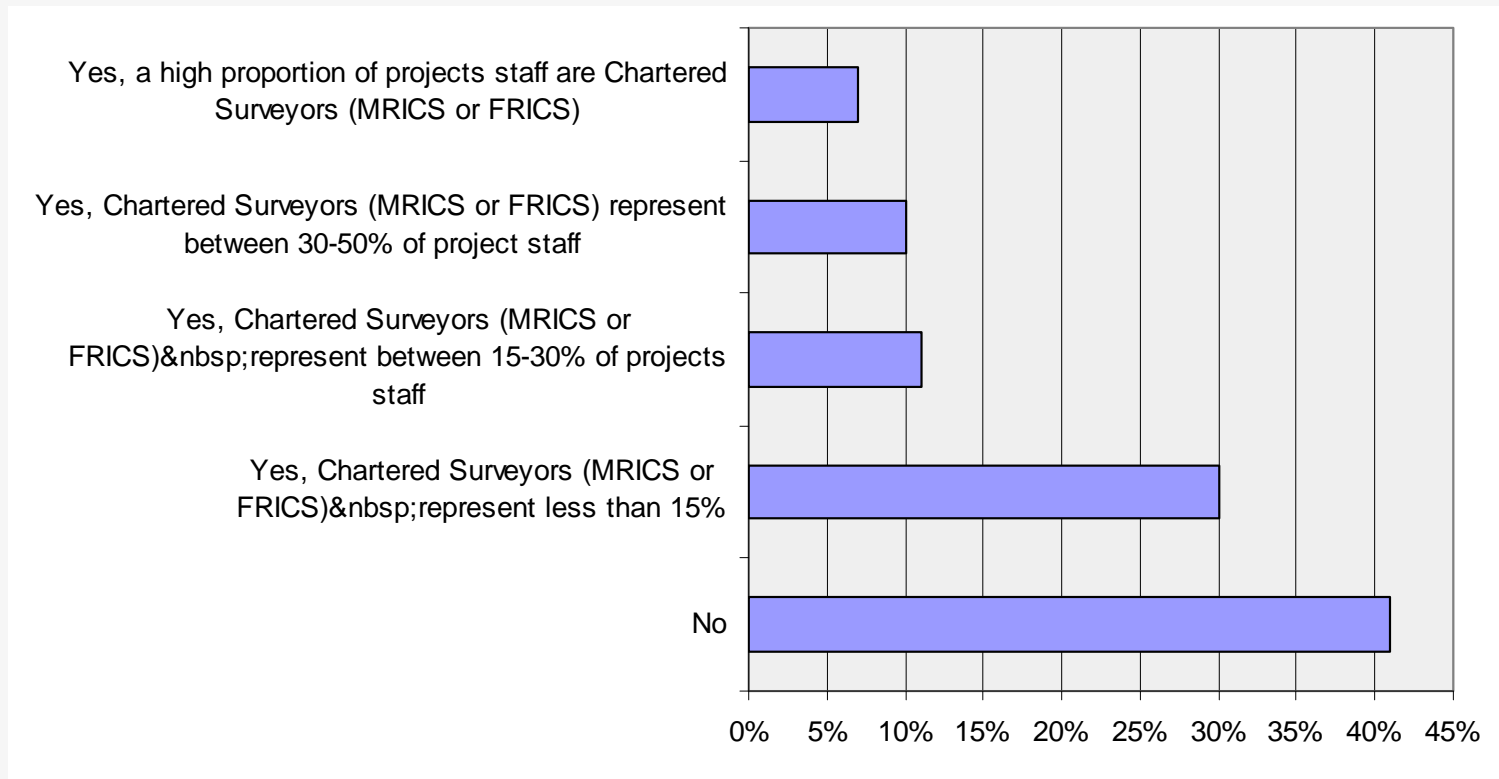
- By far the largest percent (58%) of respondents work for “Cost/Project Management/QS/ Building Science Consultant.”
- The next largest percent (21%) worked for the “Contractor/Construction Manager.”
- All other categories were at 12% or less.

Number of employees working at your company/firm?



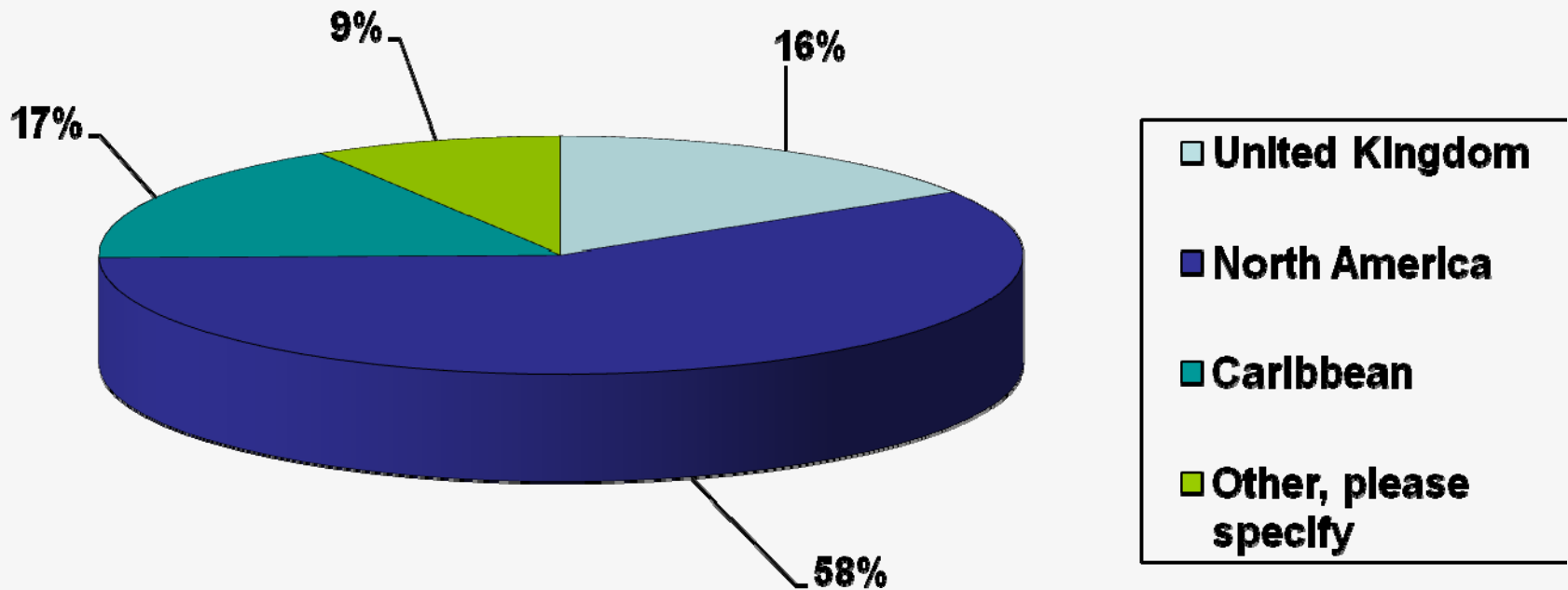
- Respondents either work for small firms (10 employees or smaller), 31%, or very large ones (more than 500 employees), 31%.

Does your company employ other Chartered Surveyors?



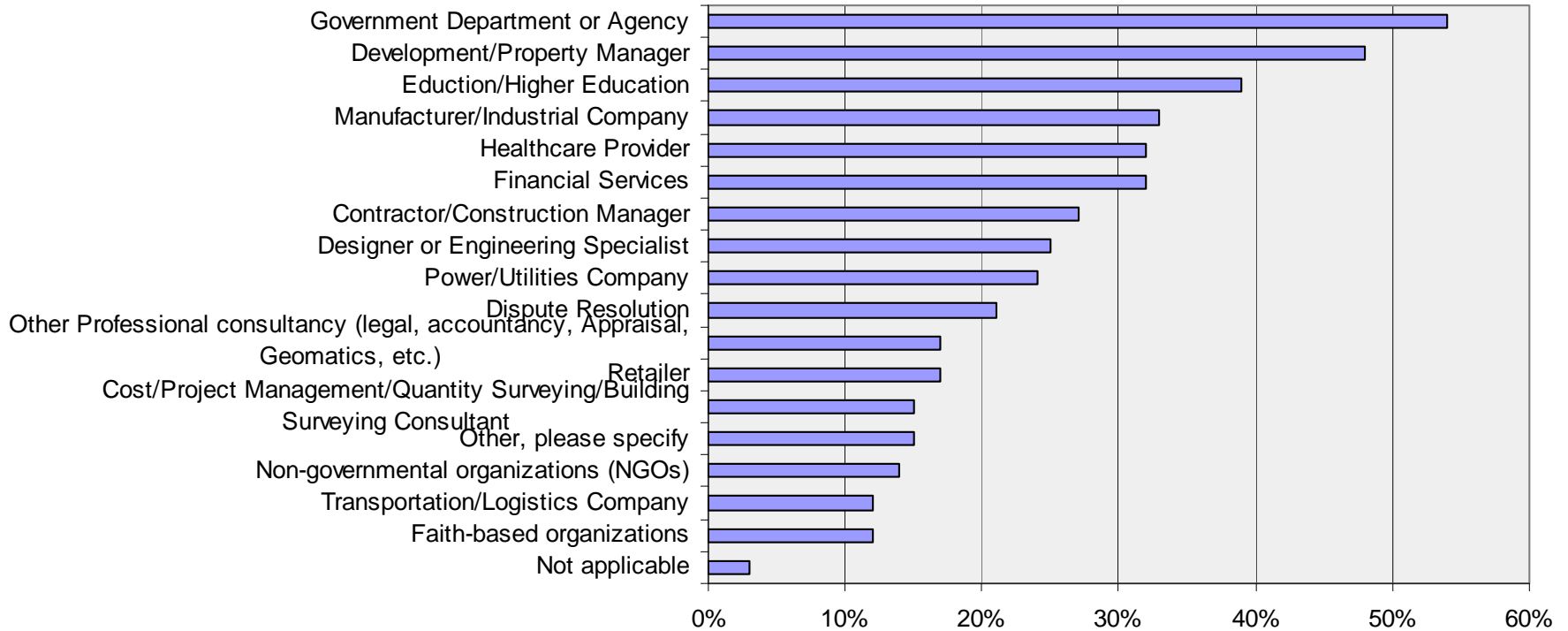
- 41% indicate they are the only chartered surveyor on staff.

Regional origin of your company?



- High percent (58%) of companies originate in North America.
- Just 16% are UK based. This seems to counters perception that members are all ex-pats working for UK based first.

What type of client company/firm do you typically provide services to (select all that apply)?



- High percent of respondents work for clients in 1) Development/Prop Mgr, 2) Government and 3) Education; with Healthcare, Manufacturing and Financial Services following. This implies that membership is skewed to large highly regulated projects.

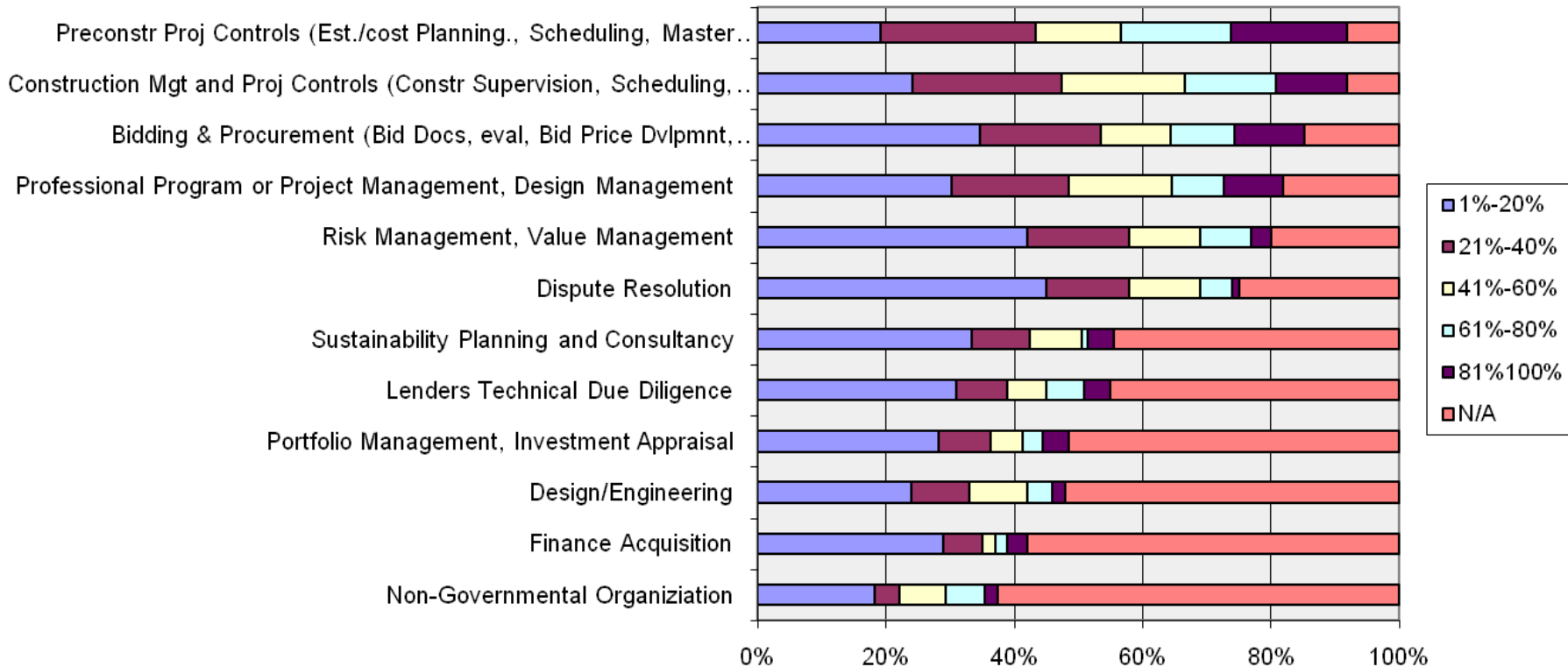
What type of client company/firm do you typically provide services to (select all that apply)?

Other, please specify	Number of Responses
Advertising, Publishing	1
Affordable Housing Developers	1
Banks, Investors	1
Energy Sector	1
Financial Institutions and Investors	1
Insurance Companies	1
K-12 Education	1
Landlords & tenants	1
Pension Funds	1
Petrochemical	1
Resort Developer	1
To the Public	1
Various Commercial Industries	1
All of the above	2
Mining	2
Private Clients	3
Property Developers	3
Hospitality	4
Oil & Gas Industry	6

- Of those who responded “Other”:
 - 6 provide services to clients in the Oil & Gas Industry.
 - 4 provide services to clients in the Hospitality Industry.
 - 3 provide services to Property Developers.
 - 3 provide services to private clients.

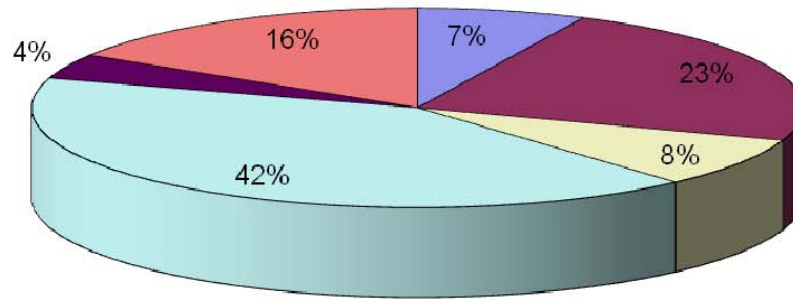
Work Practices

What percentage of your time is allocated to following work functions?



- Higher percent of time is allocated to project and cost control activities. This implies a trend toward continual auditing process.

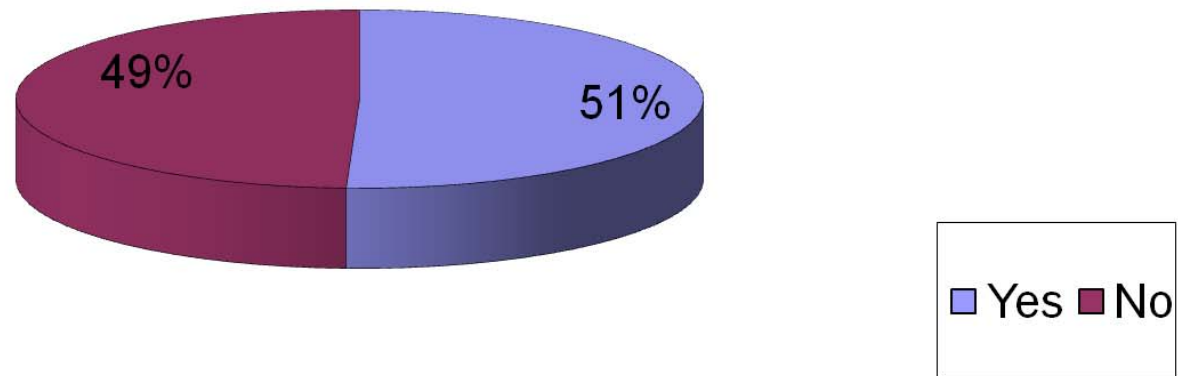
Typical Role



- Project Initiator, Lender, Owner, Government Department or Agency representative
- Program/Project Manager, Owner Representative
- Construction Manager
- Project Controls Consultant, Professional Advisor
- Independent Third Party Auditor/Monitor
- Other, please specify

- By far the typical role of respondents is as a consultant/professional advisor.

Do you describe yourself as a Quantity Surveyor?



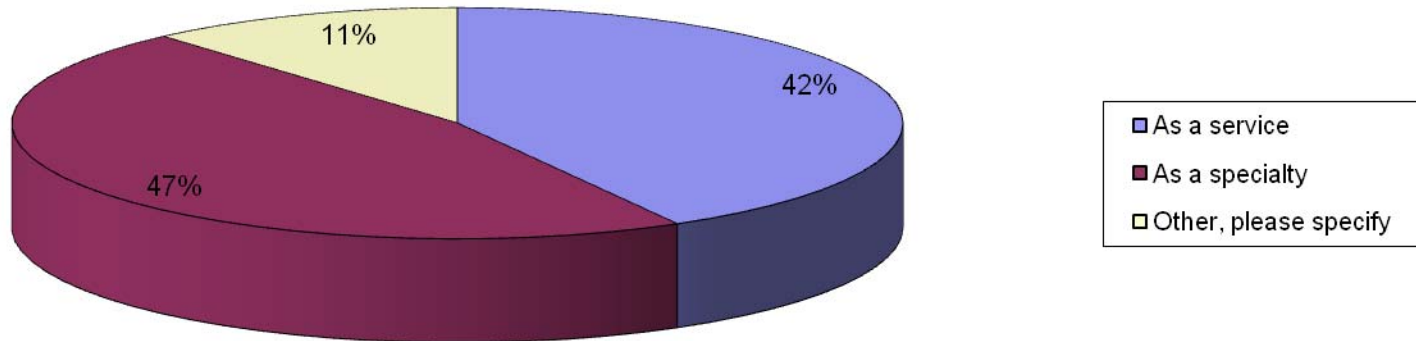
- A little more than half of respondents describe themselves as Quantity Surveyors (51%).

If you do not describe yourself as a Quantity Surveyor, how would you categorize your professional expertise?

How would you categorize your professional expertise?	Number of Responses
Cost Consultant	3
Chartered Valuation Surveyor	3
Commercial	3
Developer	3
General Practice Surveyor	3
Construction Professional	4
Project Control Advisor	4
Cost Manager	5
Construction Cost Estimator	6
Valuation	8
Construction Consultant	8
Chartered Building Surveyor	9
Project Management	18

- There are more than 40 categories of professional expertise identified by survey respondents, the most common of which are listed here.
- 18 respondents work in Project Management.
- 9 respondents are Chartered Building Surveyors.
- 8 respondents are Construction Consultants.
- 8 respondents work in Valuation.

If you describe yourself as a Quantity Surveyor, do your clients recognize Quantity Surveyor as a service or specialty?



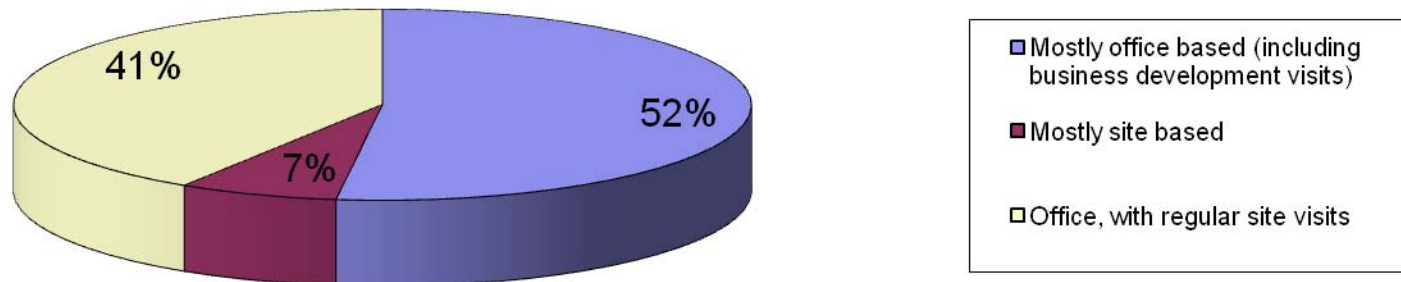
- Of those who do, they are split on how clients recognize QS.
- 42% say as a service and 47% say as a specialty.

Do your clients recognize Quantity Surveyor as a service or specialty?

Other, please specify	Number of responses
Expert Witness	1
Generalist rather than specialist	1
Not within a construction context	1
The few who know the term do not understand it	1
Both Service & Speciality	2
No recognition	6

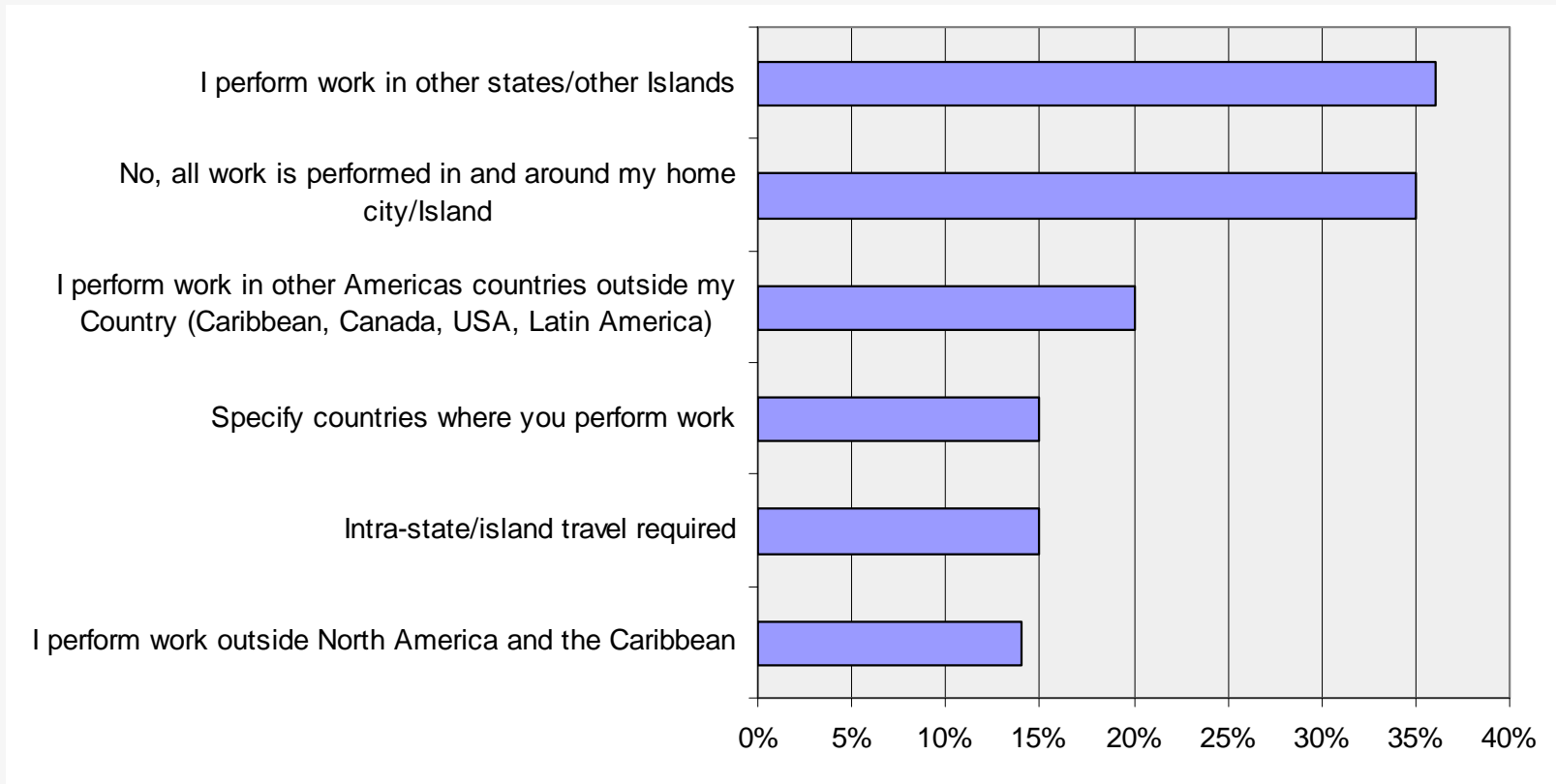
- 6 respondents say that their clients do not recognize the term Quantity Surveyor at all.
- 2 say their clients recognize Quantity Surveyor as both a service and a specialty.

Are you primarily office based or site based?



- 52% of respondents indicated they were mostly office based.
- Just 7% said they were mostly site based.
- 41% said they were office based, with regular site visits.

Do you perform work in areas outside your local region?



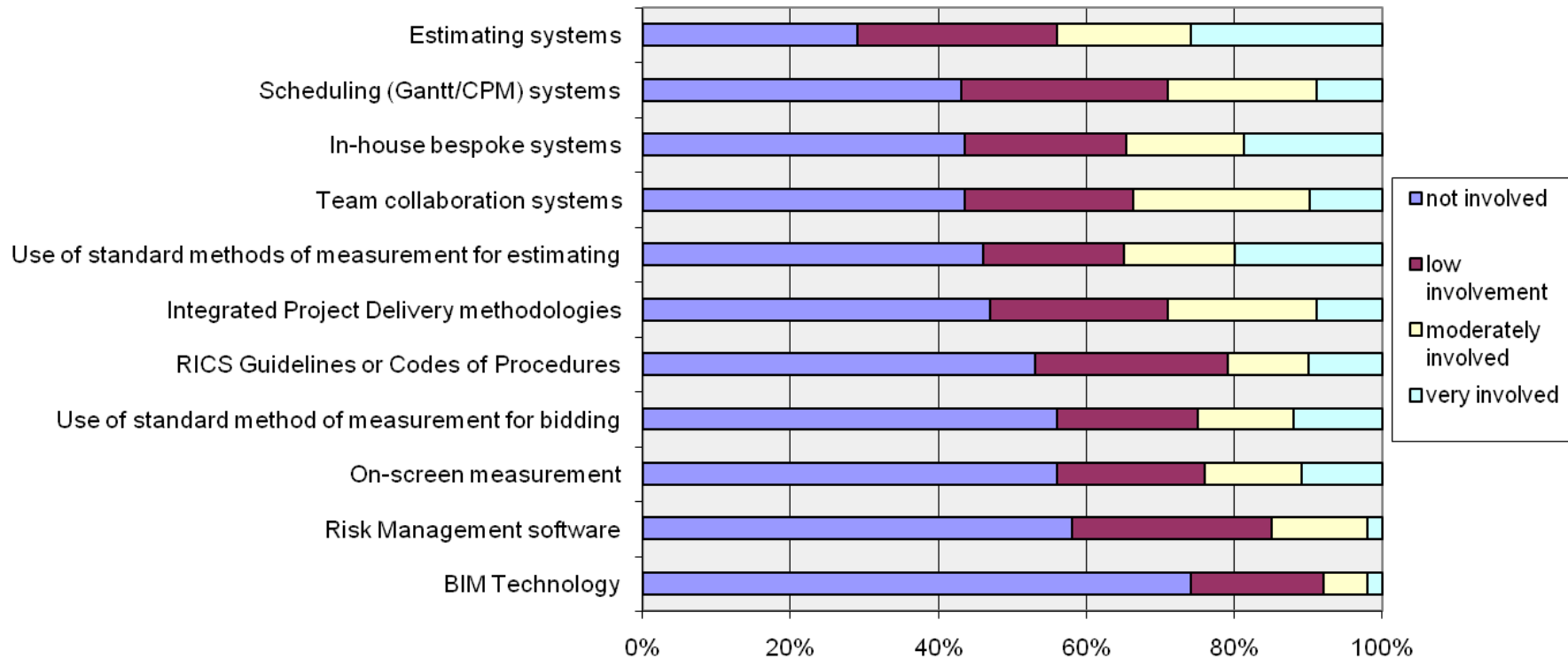
- 20% indicated that they work internationally.
- 35% indicated that perform work in and around their local region.
- 36% said they perform work in other states/islands.

Do you perform work in areas outside your local region?

Specify countries where you perform work	Number of Responses
Bahamas	2
Brazil	2
Chile	2
India	2
Jamaica	2
Middle East	2
Nigeria	2
South America	2
Trinidad & Tobago	2
Australia	3
China	3
Europe	3
Mexico	5
UK	7
USA	10
Canada	13

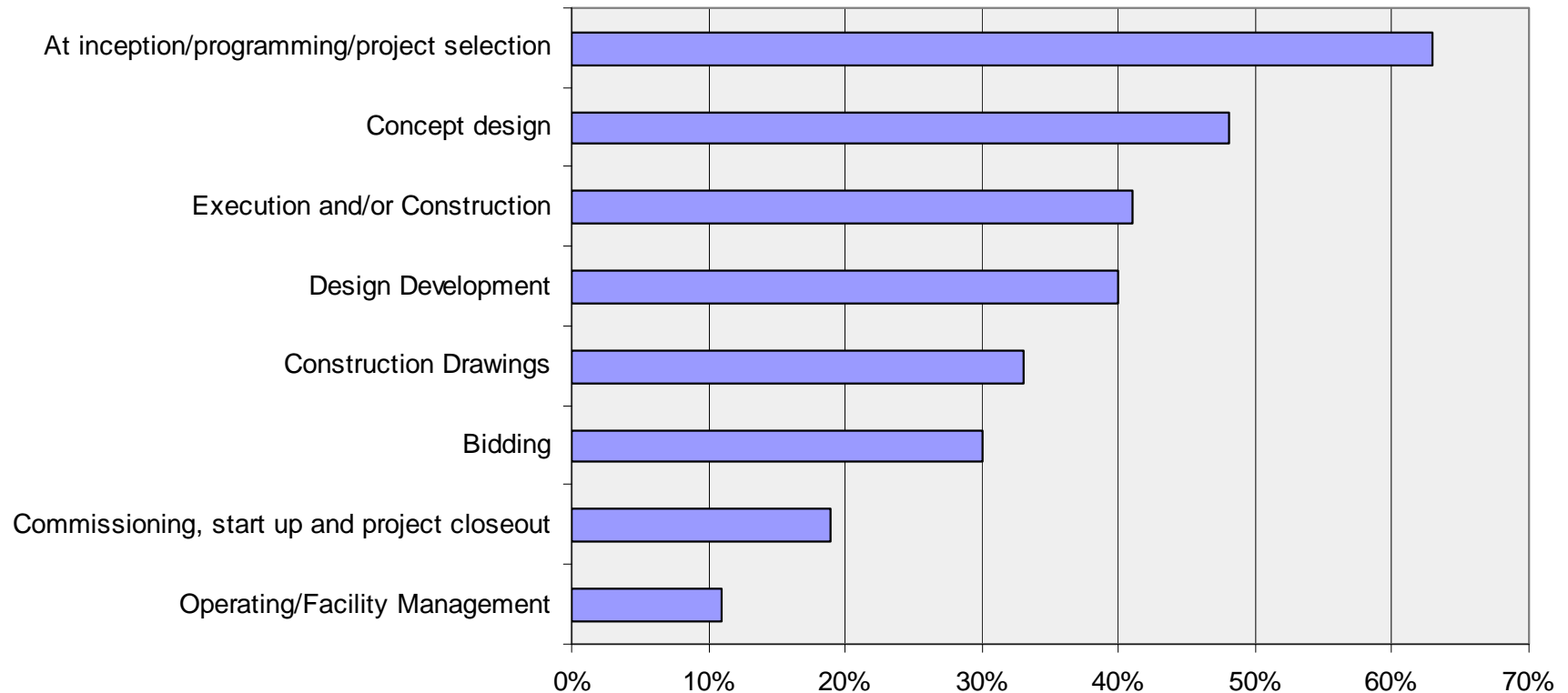
- The survey respondents named more than 50 different countries or regions, the most common of which are listed here.
- 13 respondents also work in Canada.
- 10 respondents also work in the US.
- 7 respondents also work in the UK.
- 5 respondents also work in Mexico.

How involved are you in the use of the following:



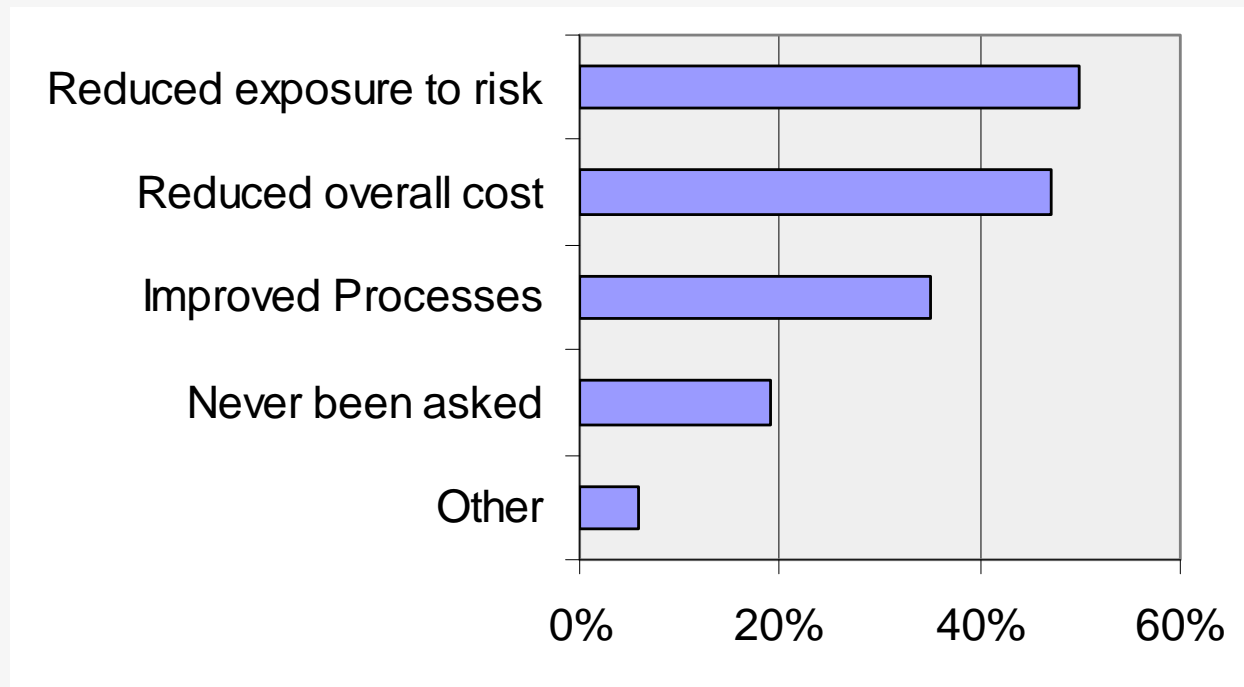
- The highest percent of respondents (44%) indicated they are involved or very involved with the use of Estimating system.
- 35% said they were involved or very involved with in the use of standard methods of measurement for estimating, as well as In-house bespoke systems.
- 34% said they were involved or very involved with Team Collaboration systems.
- Though BIM Technology is a hot topic, it is still an emerging field of activity and therefore currently accounts for a small percentage of involvement.

When do you typically become involved in a project?



- 63% of respondent indicated that they get involved in a project at inception.
- 19% say they are there for Commissioning, start up and project closeout.
- Just 11% say they become in involved in the operations/facilities management.

How do you measure the value your services provide to your clients?



- 50% of respondents measure the value of services provided to clients by measuring reduction of risk.
- 47% of respondents measure the value of services provided to clients by measuring reduction of cost.