Report commissioned by:

CitA

Research by:

Mai Morrissey, Administrator, CitA

Executive Summary

The aim was to carry out a survey within the CitA Membership Network to assess the Alliance's performance in the past 12 months in achieving its member's needs. The survey results are intended to support CitA in ensuring all members' needs are addressed and recommendations are incorporated into services offered in 2019.

The main results from the membership survey are detailed below:

- CitA's impact/contribution to the Irish Construction's digital journey is rated highly by members.
- There is a high level of satisfaction among members in regard to the services provided by CitA but there were numerous suggestions that CitA can make in 2019.
- The majority of respondents are likely to recommend CitA to another company.
- In terms of what improvements can be made in 2019, respondents suggested that CitA should hold more events outside Dublin, help improve BIM awareness, and focus on case studies.
- Participants of the survey would like see challenges that companies are facing in their digital journey.
- In terms of services that CitA could enhance and develop in 2019, it was suggested that CitA could develop a BIM implementation strategy, and a library of reference materials.
- Participants of the survey felt that LEAN integration with the digital transition should be a central message of CitA's events in 2019, along with how a BIM mandate is feasible, and the scope of systems, products, and skills required to produce digital models.
- Additional comments and observations that were provided include strengthen the regional branches, and a need to reach the decision makers directly.

Survey Objectives and Methodologies

The purpose of this survey was to gain information to be used to determine if the Alliance performance in the past 12 months has achieved its member's needs. The survey also aimed to determine what future improvements it could provide in regard to services to its members.

The chief method utilized was primary research investigation, undertaken via electronic questionnaire sampling. The survey was sent out by email, and shared on social media, requesting feedback on their opinions on current membership offerings and in establishing possible offerings for 2019.

An initial link to the survey was sent out on the 31st October to CitA Members by email, a total of 32 responses were completed by the 10th December.

The questionnaire was Internet-enabled and potential respondents were emailed the website link, together with background information on the survey and detailed explanations as to how to complete it.

Q2 Which of the following stakeholders would your organisation best fit in?
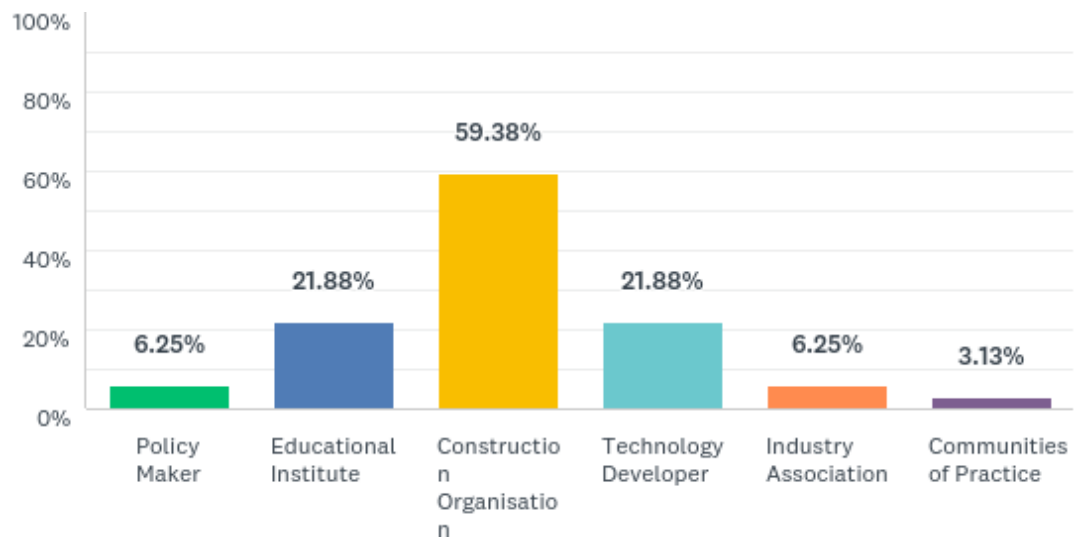
The majority of the survey respondents were from a construction organisation, followed by technology developers, and educational institutes at 21.88% each, policy makers, and industry associations at 6.25% each, and communities of practice making up 3.13% of the respondents.

Q3 Which of the following categories of relative maturity do you feel these stakeholders are in at present on their digital journey in Irish Construction?
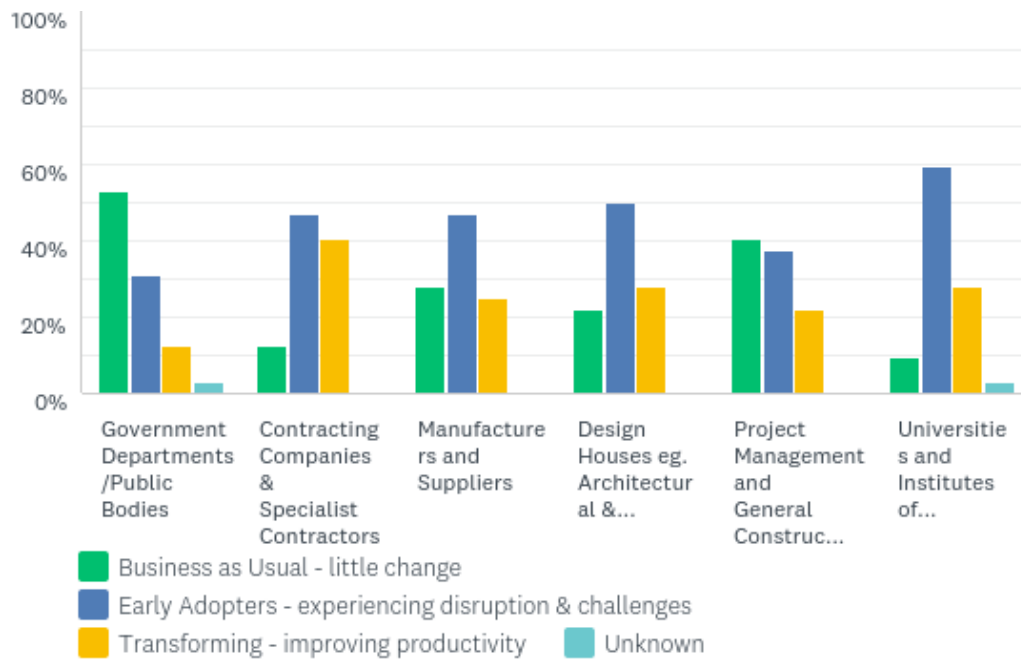
|	BUSINESS AS USUAL - LITTLE CHANGE	EARLY ADOPTERS - EXPERIENCING DISRUPTION & CHALLENGES	TRANSFORMING - IMPROVING PRODUCTIVITY	UNKNOWN	TOTAL	WEIGHTED AVERAGE
Government Departments/Public Bodies	53.13% 17	31.25% 10	12.50% 4	3.13% 1	32	1.66
Contracting Companies & Specialist Contractors	12.50% 4	46.88% 15	40.63% 13	0.00% 0	32	2.28
Manufacturers and Suppliers	28.13% 9	46.88% 15	25.00% 8	0.00% 0	32	1.97
Design Houses eg. Architectural & Engineering services	21.88% 7	50.00% 16	28.13% 9	0.00% 0	32	2.06
Project Management and General Construction Consultancy	40.63% 13	37.50% 12	21.88% 7	0.00% 0	32	1.81
Universities and Institutes of Technology	9.38% 3	59.38% 19	28.13% 9	3.13% 1	32	2.25

Contracting companies and specialist contractors are seen as the most mature in their digital journey in the Irish Construction Industry, whereas government departments and public bodies are perceived to have made the least amount of progress in their digital journey. Universities and Institutes of Technologies received the majority in the early adopters category.

Q4 How would you rate CitA's impact/contribution to the digital transition of the Irish Construction sector since its inception over 15 years ago?
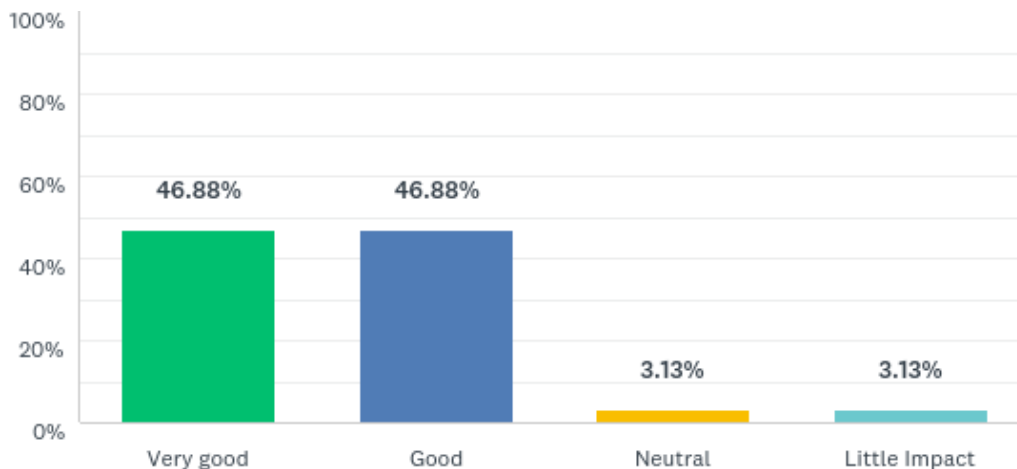

CitA's impact/contribution to Irish Construction Industry's digital journey was rated highly, with 46.88% of participants rating it as very good, and 46.88% rating it as good.

Q5 How would you rate the overall services provided by CitA in 2018?
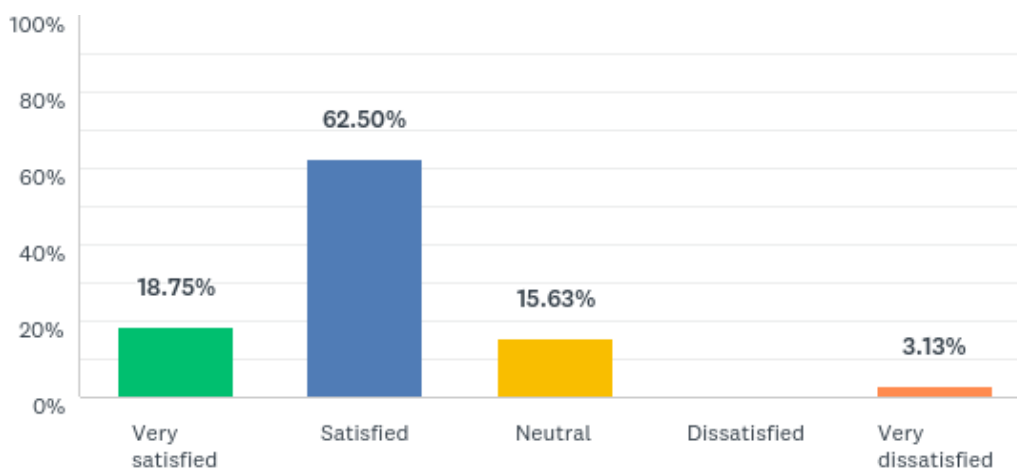
There was a high level of satisfaction in regards to the services provided by CitA, with over 62.5% satisfied and 18.75% very satisfied.

Q6 How likely are you to recommend CitA to another company?
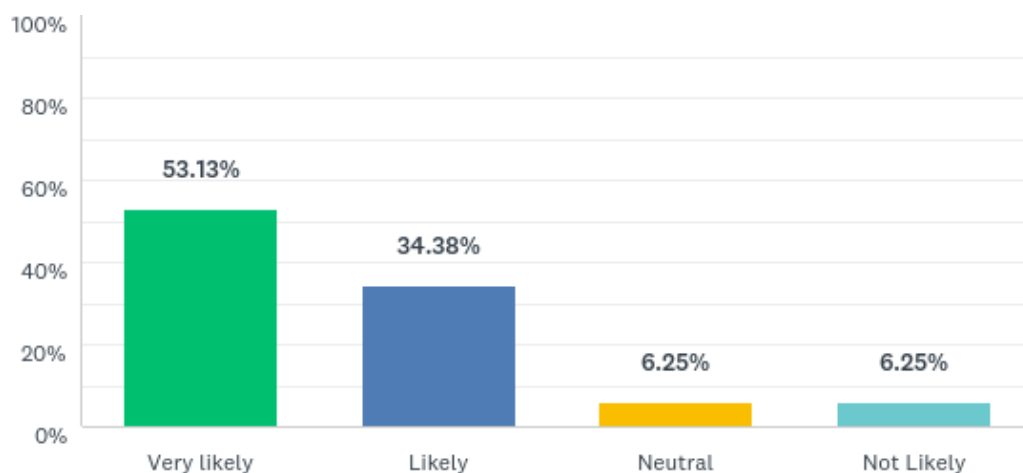
The majority of respondents were very likely to recommend CitA to another company, with only 6.25% not likely.

Q7 Where do you think CitA can make improvements in 2019?

The key suggestions as to how CitA can make improvements are as follows:

- More seminars/gatherings outside of Dublin.

- Help to improve BIM awareness for senior managers.

- Need for a tailored message to each cohort of the Construction Sector to drive engagement

- Publish guidance documentation.

- Market/communicate more of CitA's service offerings & needs to be an industry influencer.

- Better VC facilities to enable better participation by people outside Dublin.

- Align with decision makers both in public and private sector.

- Focus on example projects, illustrating the practical approaches taken by AEC companies in applying BIM processes, procedures and technology to all work stages. Also need to engage private clients in CitA events to educate them on the benefits to them.

- Leadership on Digital Roadmap.

- Entice more clients into the group.

Q8 What would you like to see more of in 2019?

The below is a selection of responses with regards to what members would like to see more of in 2019:

- Suppliers demonstrating how data can be used through the project life cycle from concept design to handover to client operations.
- The challenges companies are facing in their digital journey.
- Lean Solutions.
- Time lapse videos of construction projects. Drone usage on construction projects.
- Get the decision makers in the different stakeholders to attend at least one session.
- Progression on technologies.
- Local Regional events, supported by central office.
- Seminar for demonstrating new technologies.
- Content creation on the website, e.g. case studies, interviews.

Q9 What service is not currently offered by CitA that could be developed as an enhanced service in 2019?

Suggestions of what CitA could develop as an enhanced service in 2019 are listed below:

- CitA does not cater for members/non-members to walk in off the street to chat with somebody on BIM, digital construction, the Irish Road Map or CitA in general.
- BIM implementation strategy
- Library of reference materials and information from presentations
- Recommendations of Software / Apps solutions that are available within the construction marketplace or reviews completed of previously used Software applications, from a neutral perspective or from CitA Members, as knowledge sharing.
- Run the regions similar to the Engineers Ireland Regions.
- Discipline based pool of resources that each discipline can go to, to gain knowledge on benefits of BIM to their specific discipline.
- What are the demands of the clients going to be 12/24/36 months after occupying the building in terms of their technology requirements within the building and connectivity to the outside world. Training in this regard should pay big dividends to our industries capability on both a national and international level.

Q10 What message do you feel should be front and centre in CitA's Digital Transition series and national roadshow in 2019?

A selection of the ideas and suggestions of the messages that participants would like to see at CitA events in 2019 are listed below:

- CitA should sell and educate about the roadmap.

- Integration of LEAN with the digital transition. Encouraging greater use of IT in the field, off-site manufacturing, QA control, etc.

- Demystifying digital processes, making them relevant and accessible to all.

- How a BIM mandate is feasible.

- The wide scope of systems, products and skills required to produce Digital Models.

- Pushing towards Ireland's BIM mandate.

- Practical examples of how BIM has been applied throughout all work stages on a project.

- The Government needs to "Digital Up" and lead the way taking advantage of opportunities that will come through Brexit to mitigate the challenges that Brexit may also bring.

- Enabling & delivering the digital roadmap.

- Client benefits.

- Transformation of work practices and the implementation of new technology.

- Construction 4.0 and the use of Digital Twins, Augmented Reality, Internet of Things, Big Data and Artificial Intelligence are all likely consumers of BIM data.

Q11 CitA are looking to 2019 as the year to focus on the theme of 'Productivity Improvement'. Would you be supportive of this theme?
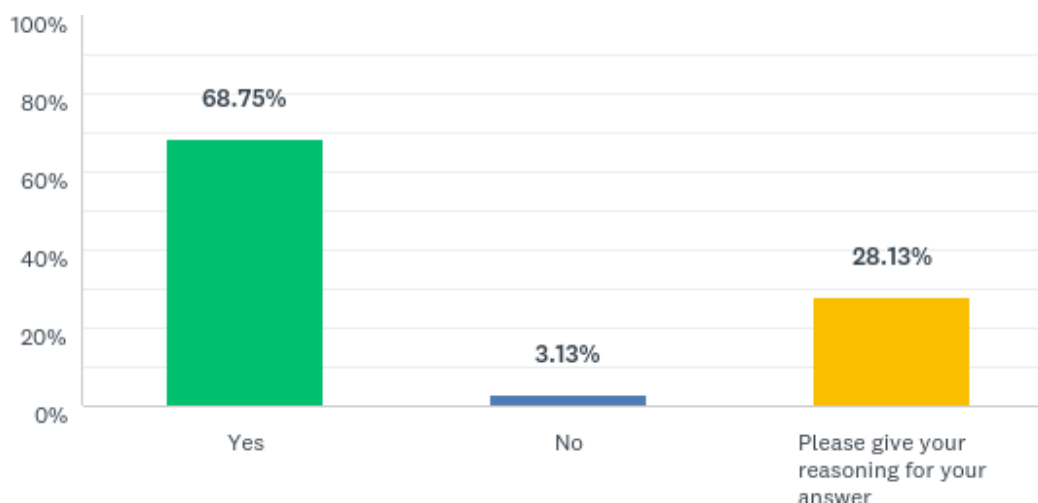
The majority of respondents would support the theme of 'Productivity Improvement', with only 3.13% stating they would not support this theme. Some of the reasons for participants' answers include;

- The proposed theme will mean something different to all industry stakeholders such as architects or engineers or construction professionals. Link everything back to money savings, gains in productivity and efficiency, and why investment is important.
- Productivity is key, there is a need to demonstrate that the process will improve productivity and lead to better margins for everybody. To date, this have not been demonstrated by anybody.
- Productivity improvement is an untapped area for the potential for digital technologies.
- Topcon's global theme 'the Intersection of Infrastructure of Technology' embodies this theme of using digital technology to help improve the global aging infrastructure system, this is a perfect fit for Topcon.

Q12 Please provide any additional comments/observations that will help CitA complete its programme of services and activities 2019.

- LEAN has a huge part to play in the improvement of efficiency going forward. The digital transition is instrumental in this.
- Focus on not just software, focus on lean initiatives also within companies and how these changed how they worked. Disruptive innovation.
- People at CitA events are Technically Interested but not necessarily decision makers. Need to reach the decision makers more directly.
- Need to strengthen regional branches.
- Bring smaller contractors along and look at standardisation of procurement process.

Findings and Conclusions

In summary, it appears that there was a high level of satisfaction from members in 2018. CitA is regarded as having a positive impact on the digital journey in the Irish Construction Industry, the services CitA provide were rated highly, and the majority of the survey respondents would recommend CitA to another company. The following results were recorded:

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Overall, a high level of satisfaction was recorded from the survey result, with positive ideas and suggestions put forward for 2019.