

2020

TECHNOLOGY

Its position and
impact on Surveying



Introduction



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Royal Institution of Chartered Surveyors UK & Ireland World Regional Board Member

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.

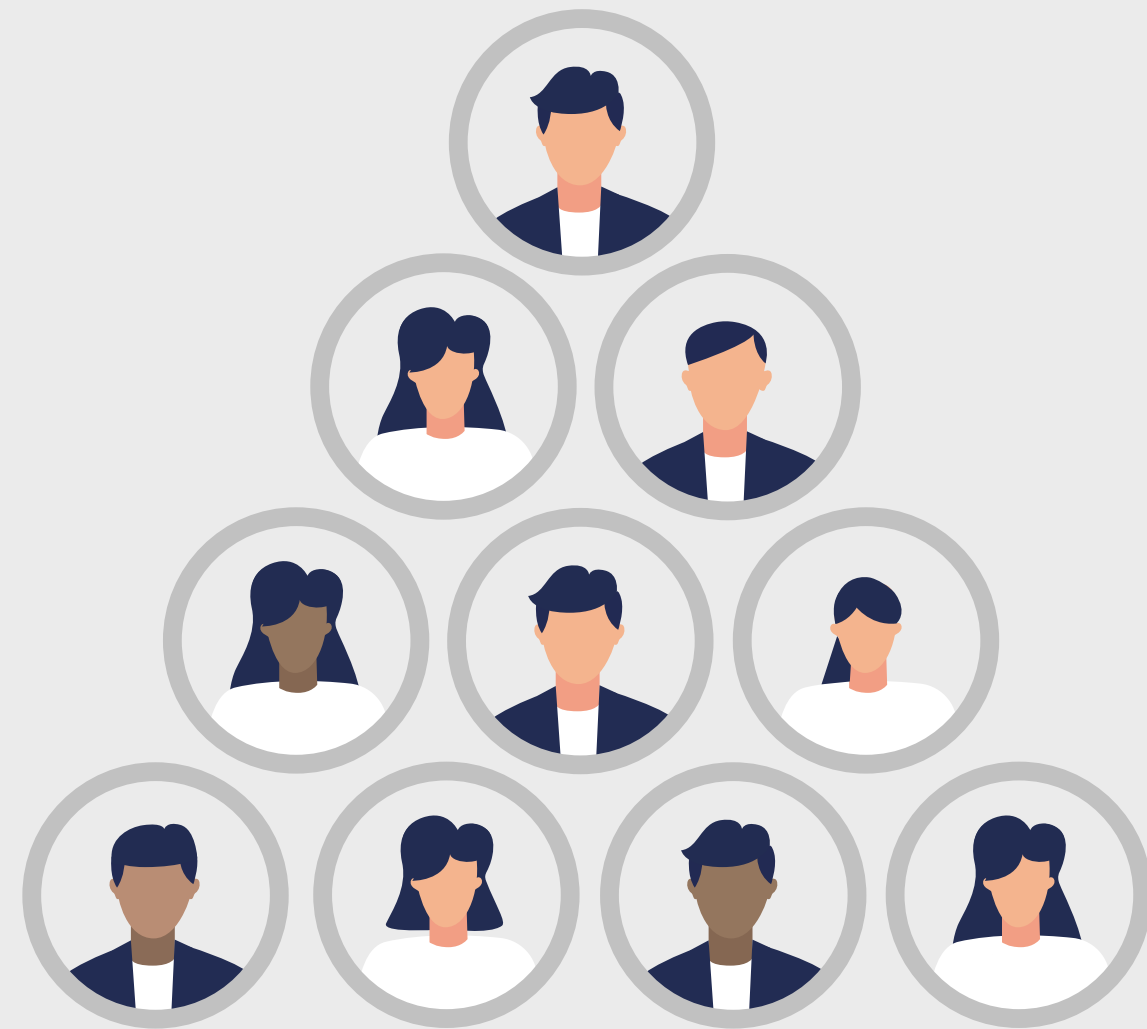
Those using PropTech has increased from 60% to 68%, those with a digital strategy in place or working on one was 57% now it is 79%, those with a good understanding of PropTech is up from 43% to 52%, those with the necessary skills and expertise to fully embrace PropTech has increased from 40% to 48%, 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

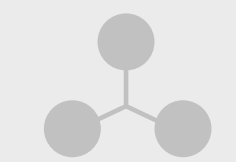


85%
MALE



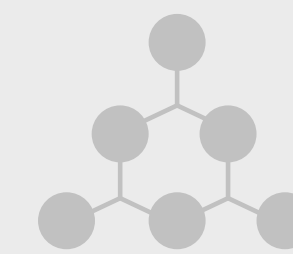
15%
FEMALE

SIZE OF ORGANISATION



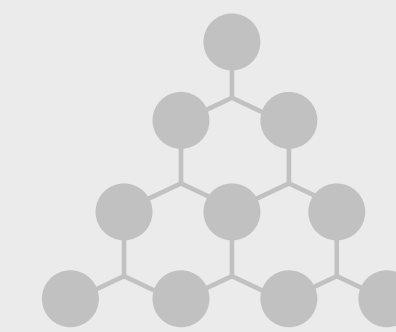
MICRO

38%



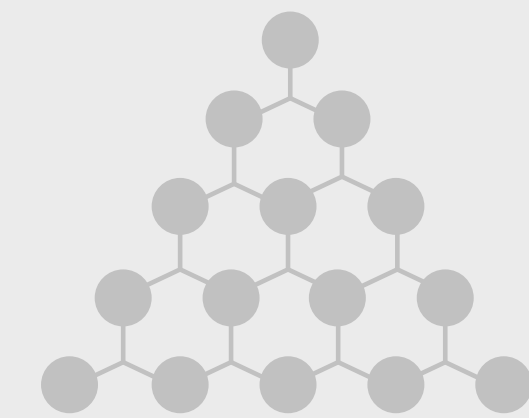
SMALL

14%



MEDIUM

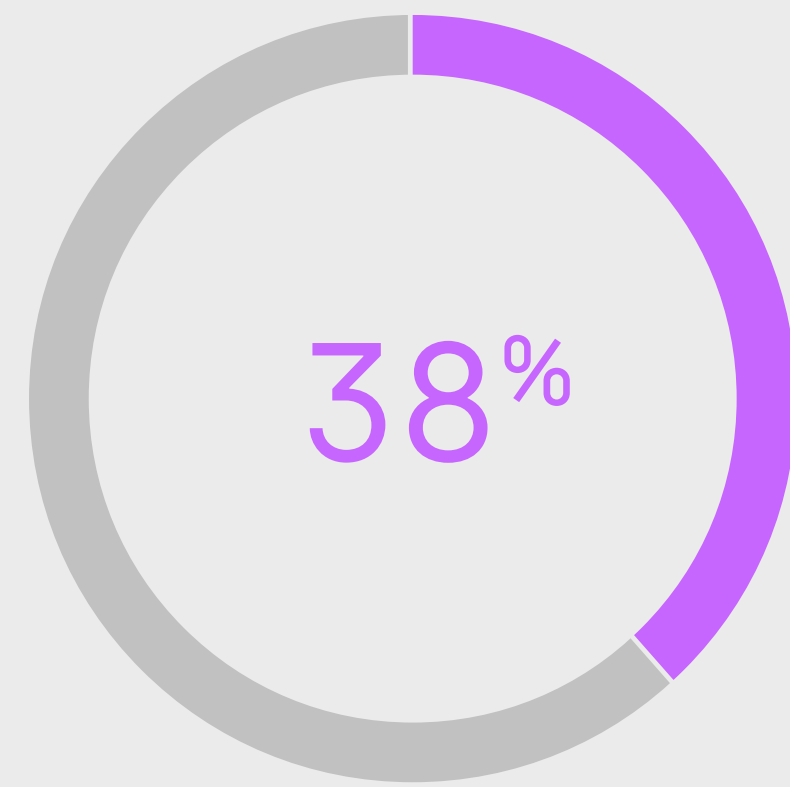
16%



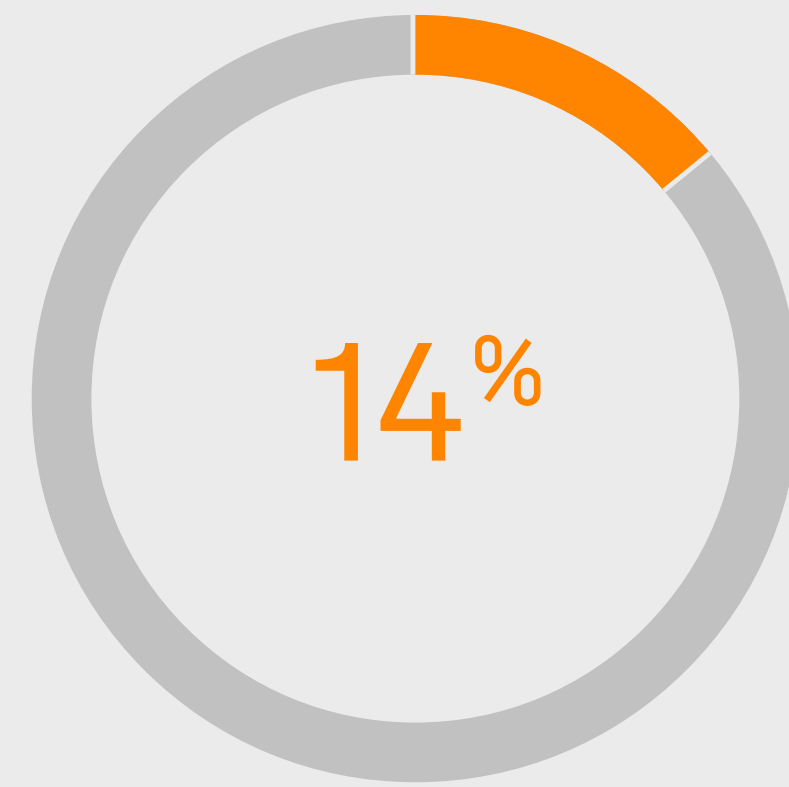
LARGE

32%

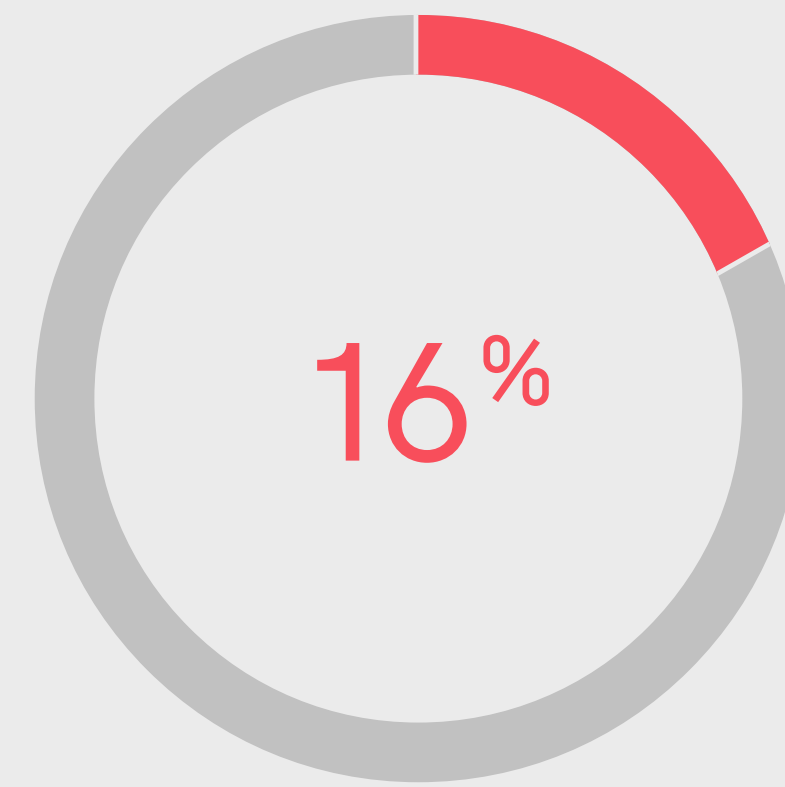
01 What is the **size** of the organisation you work for?



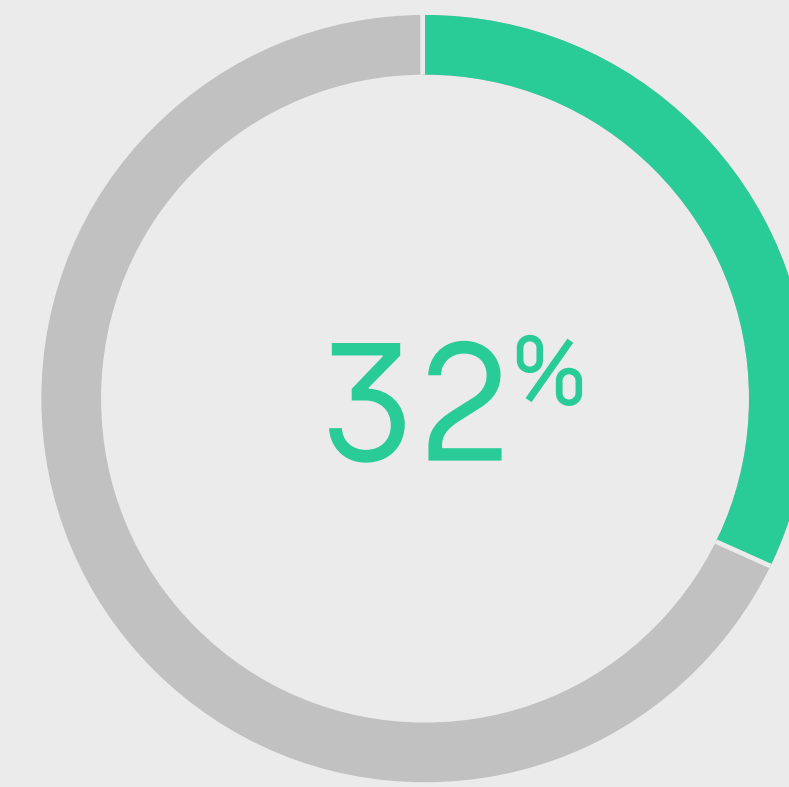
MICRO <10



SMALL <50



MEDIUM <250

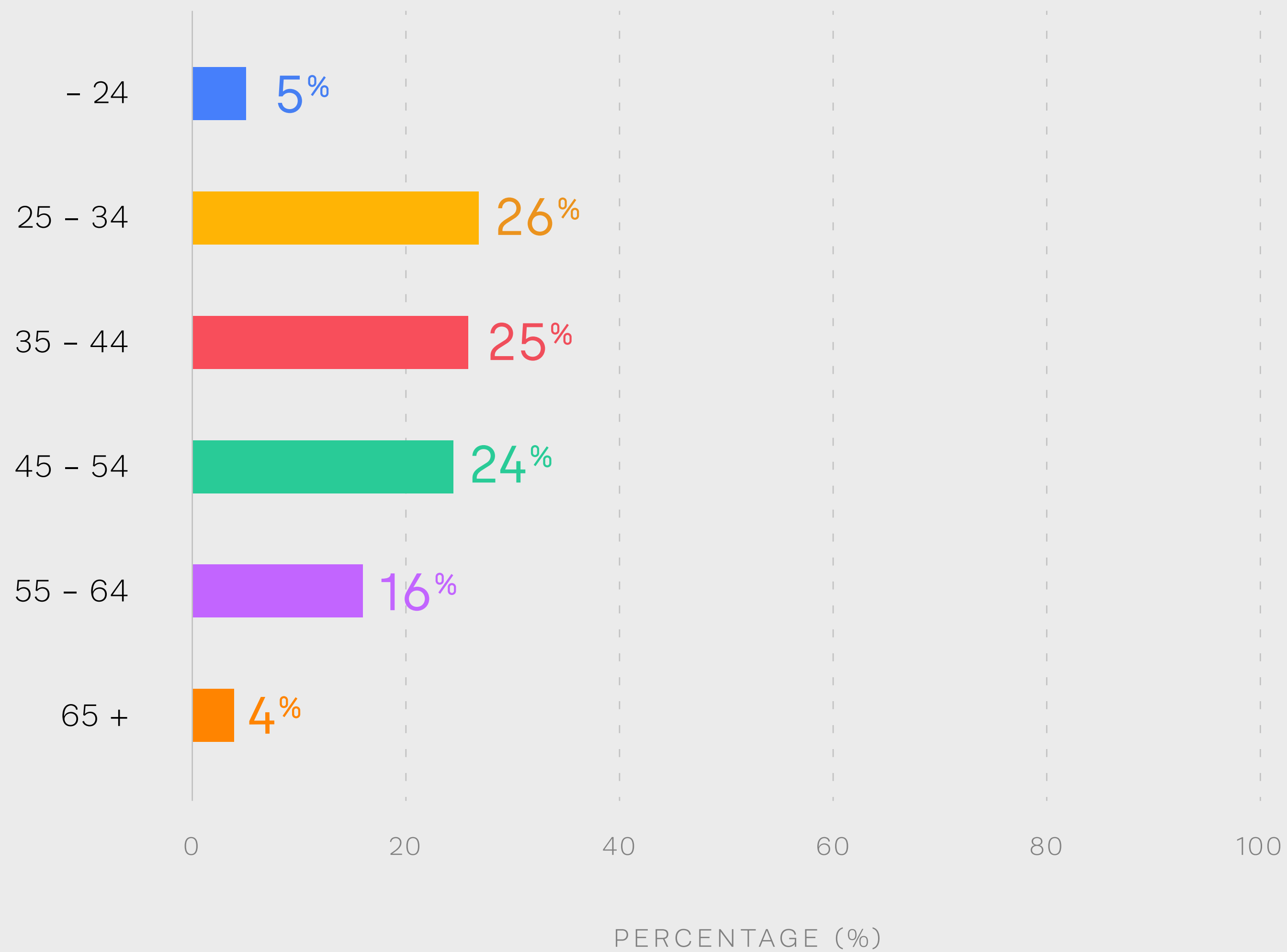
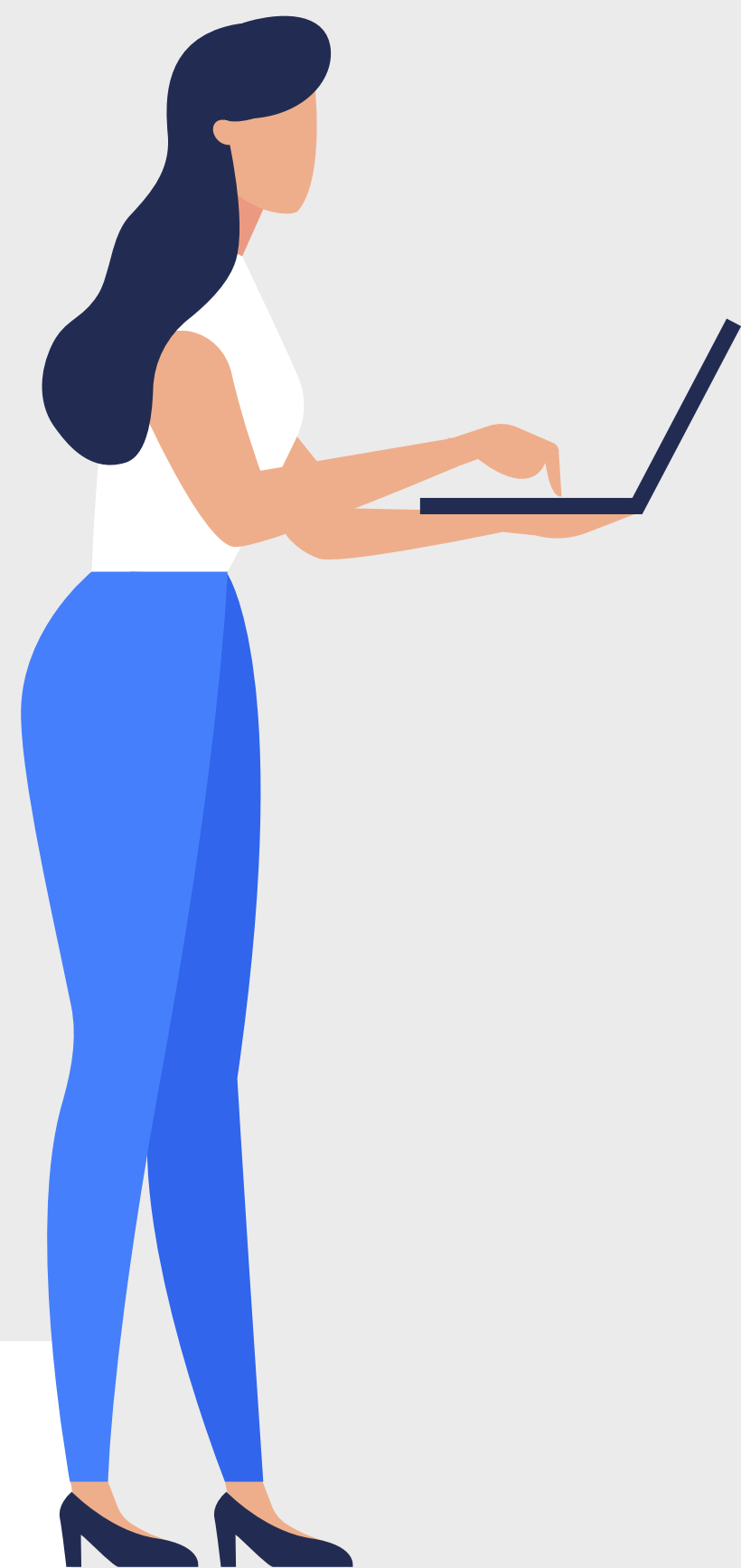


LARGE >250

02 What is your gender?



03 What is your age?



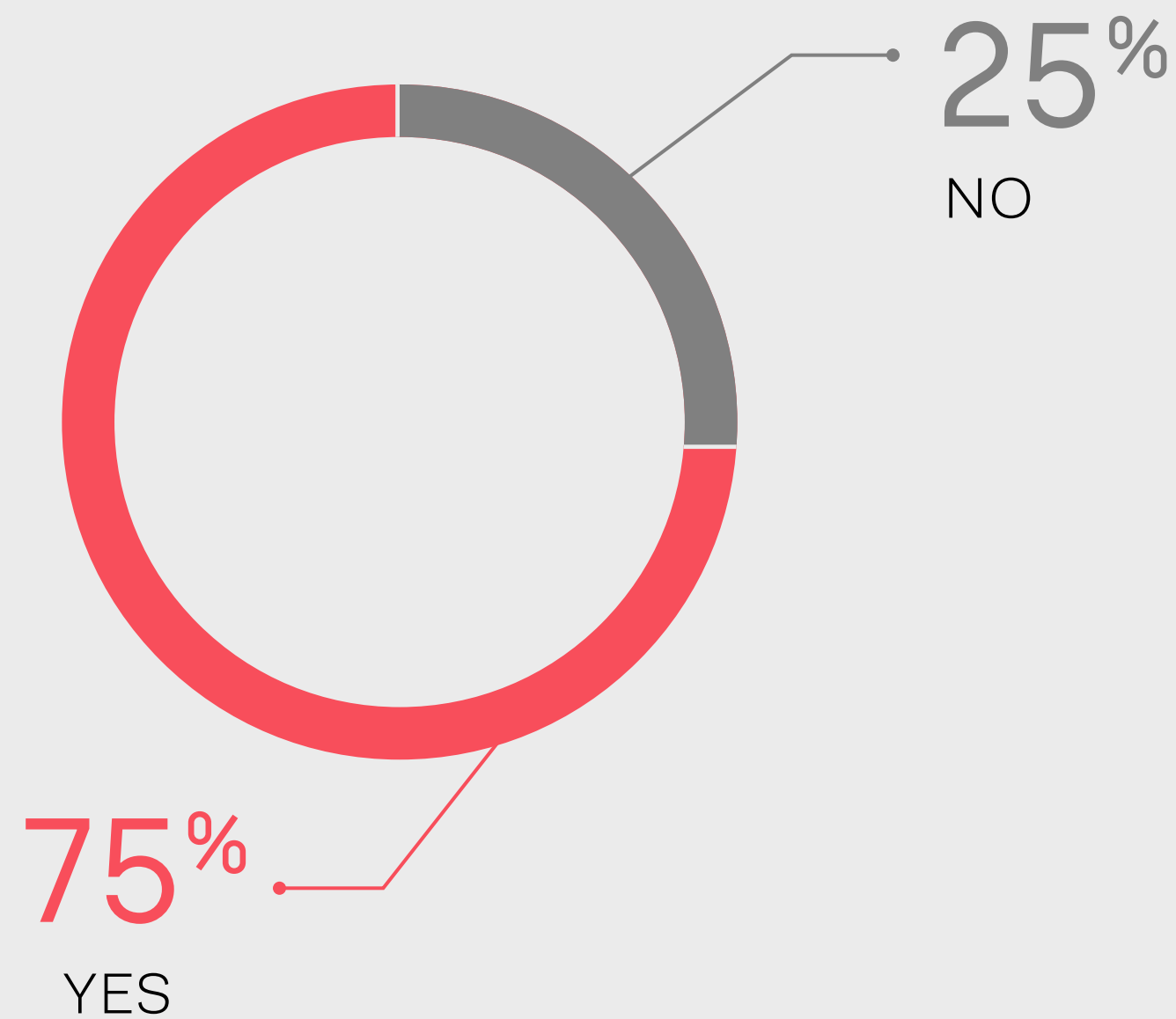
04 What is your region?

- EAST ANGLIA
- EAST MIDLANDS
- LONDON
- NORTH
- NORTH WEST
- NORTHERN IRELAND
- ROI
- SCOTLAND
- SOUTH EAST
- SOUTH WEST
- WALES
- WEST MIDLANDS
- YORKSHIRE & HUMBERSIDE

- 1% AMERICAS
- 1% AUSTRALASIA
- 3% EUROPE (OTHER THAN UK & ROI)
- 1% SUB-SAHARAN AFRICA



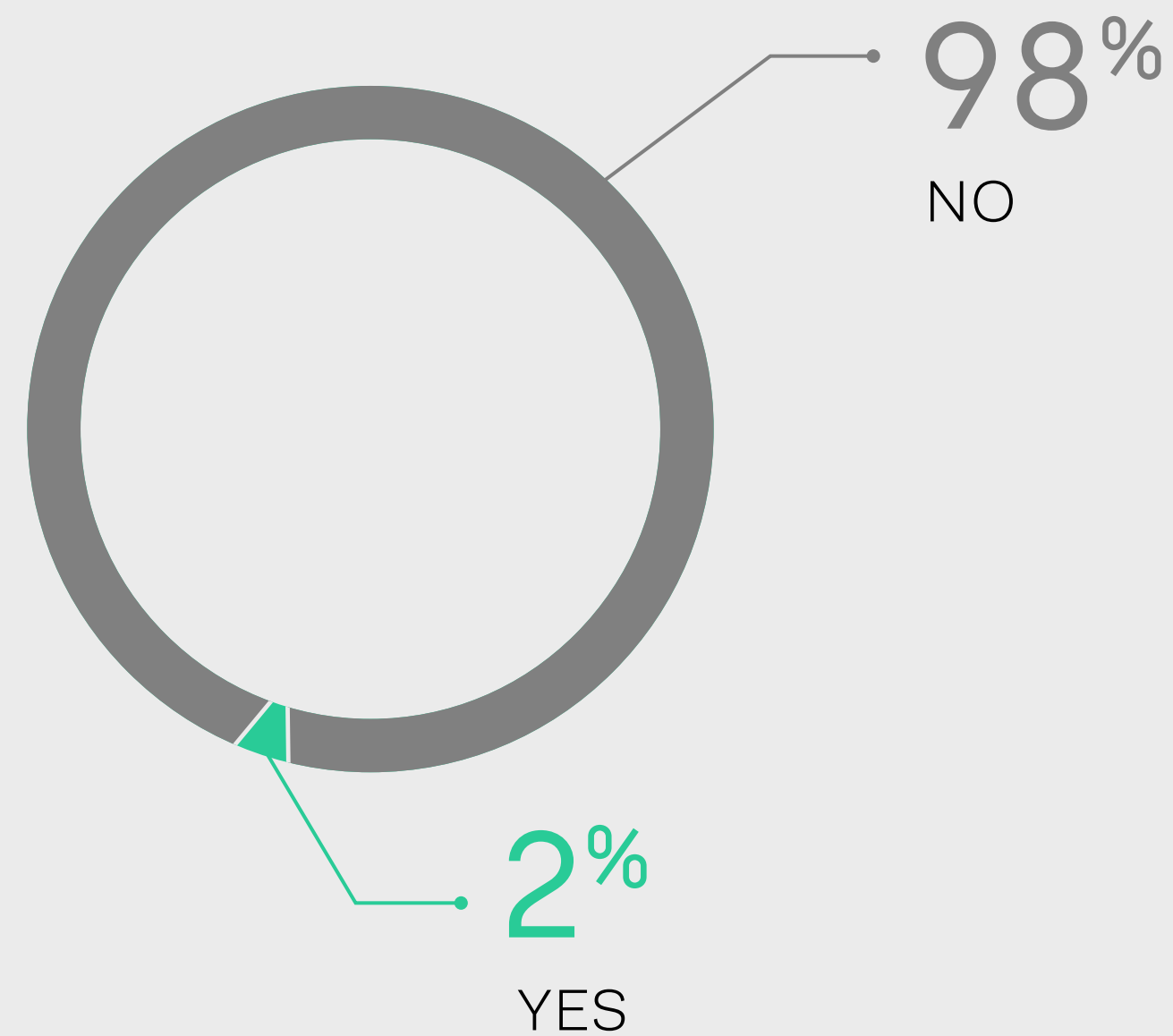
5a Are you a member of the **Royal Institution of Chartered Surveyors**?



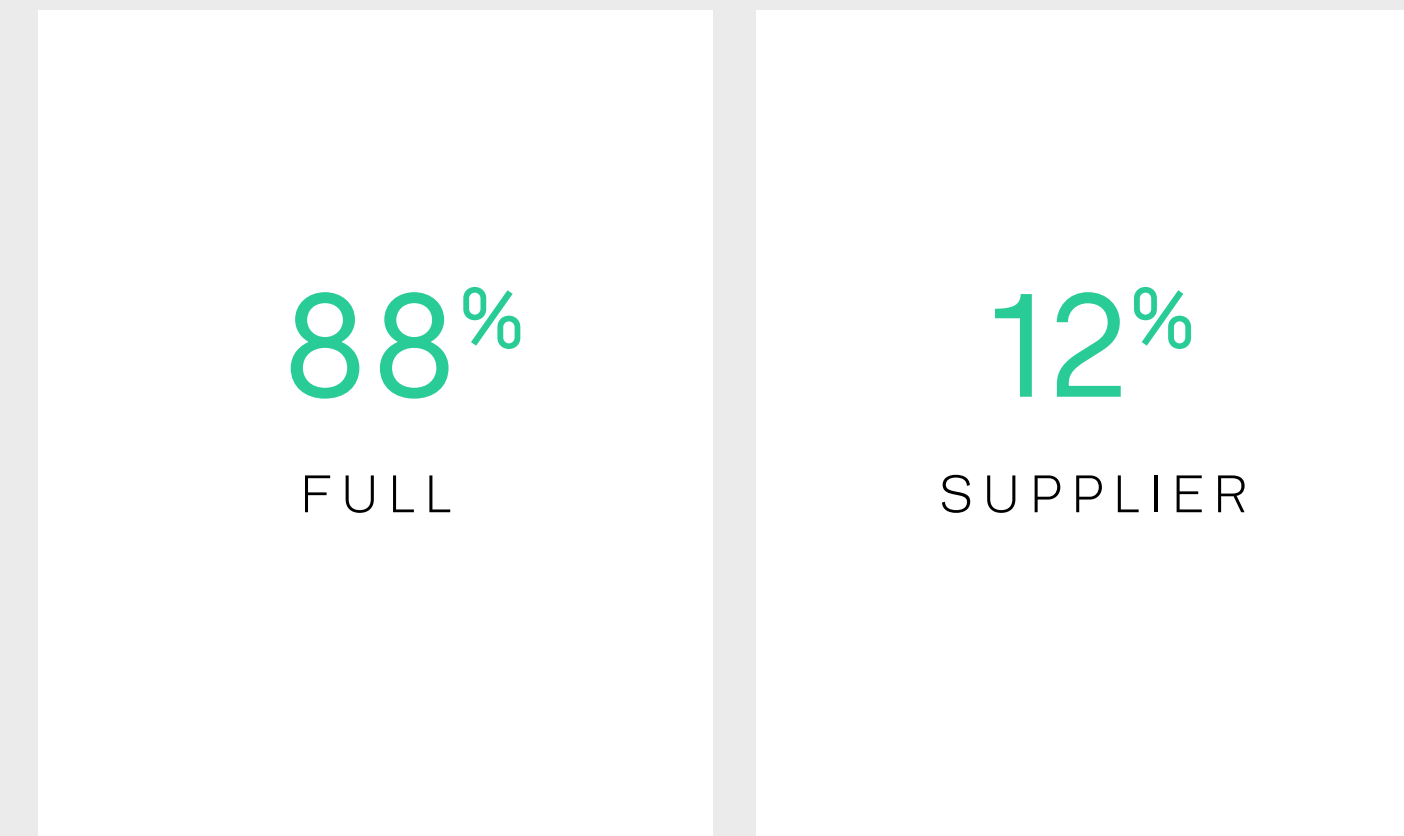
5b If **Yes** what **Professional Group** are you a member of?

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

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

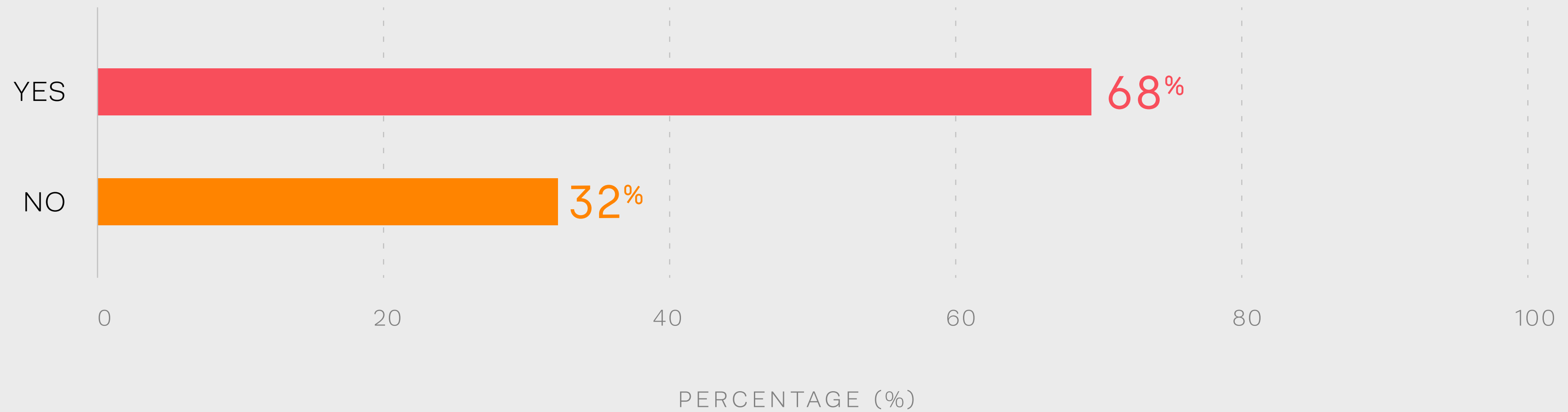


6b If **Yes** what **Professional Group** are you a member of?



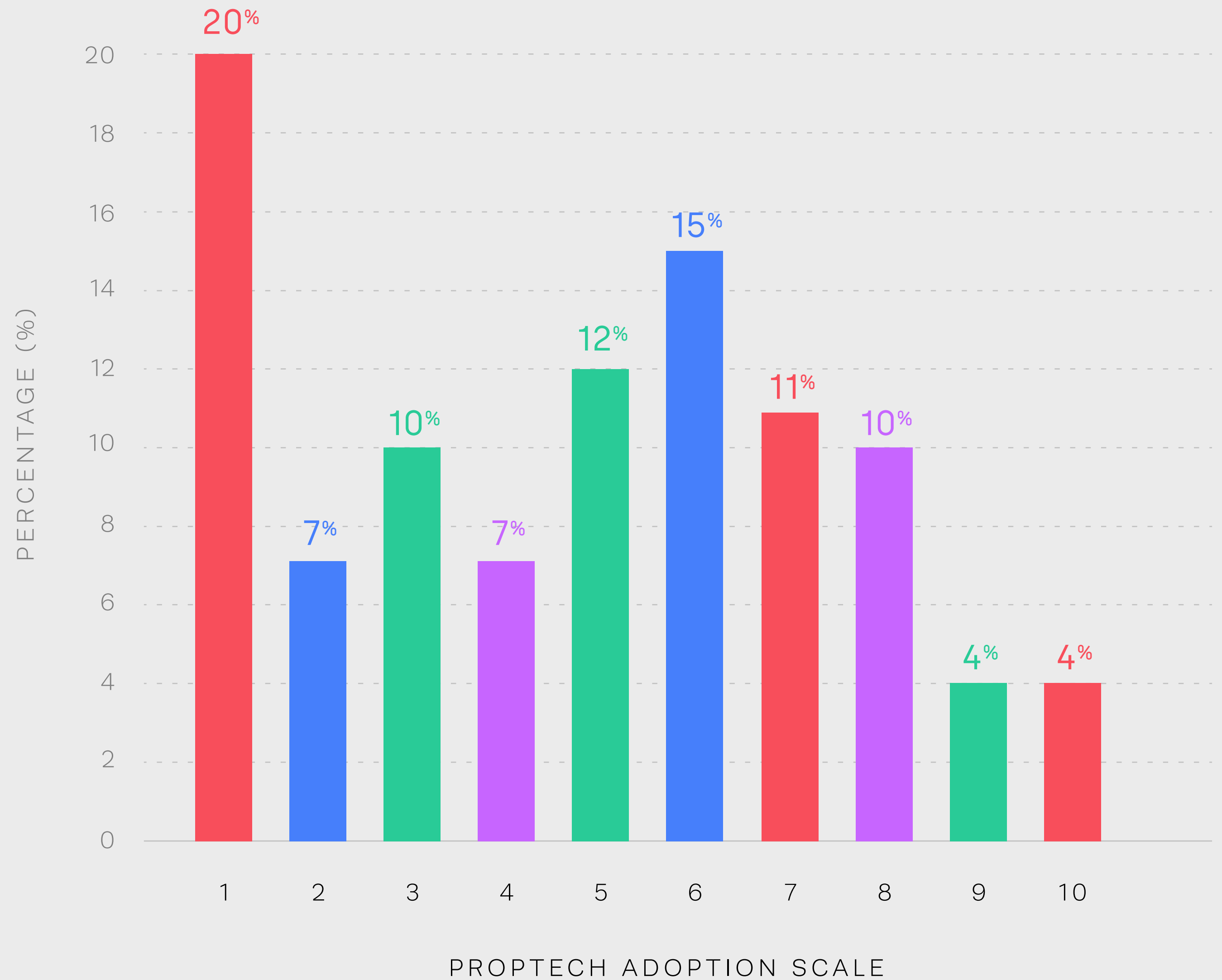
07 Are you using PropTech?

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

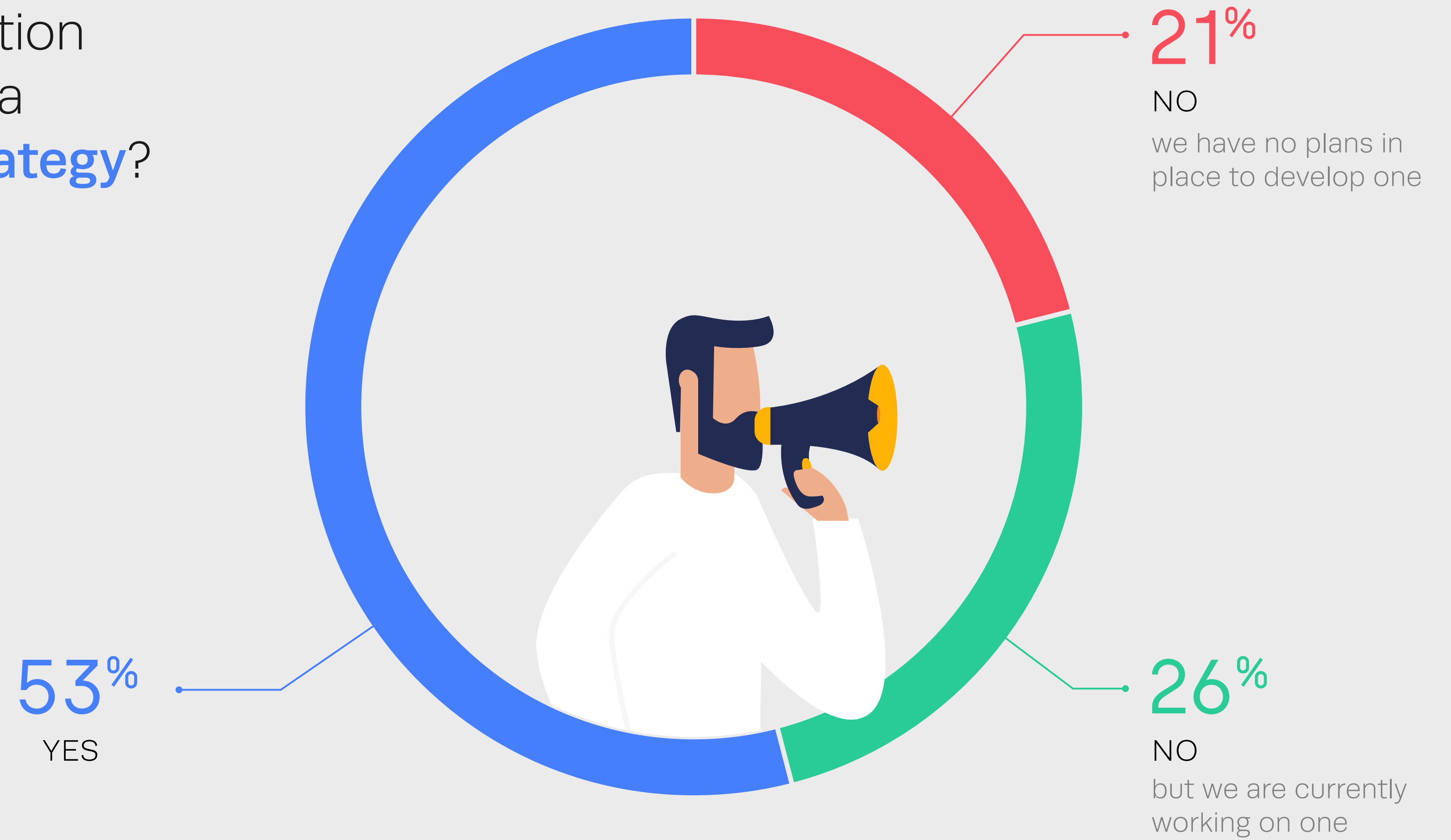


08

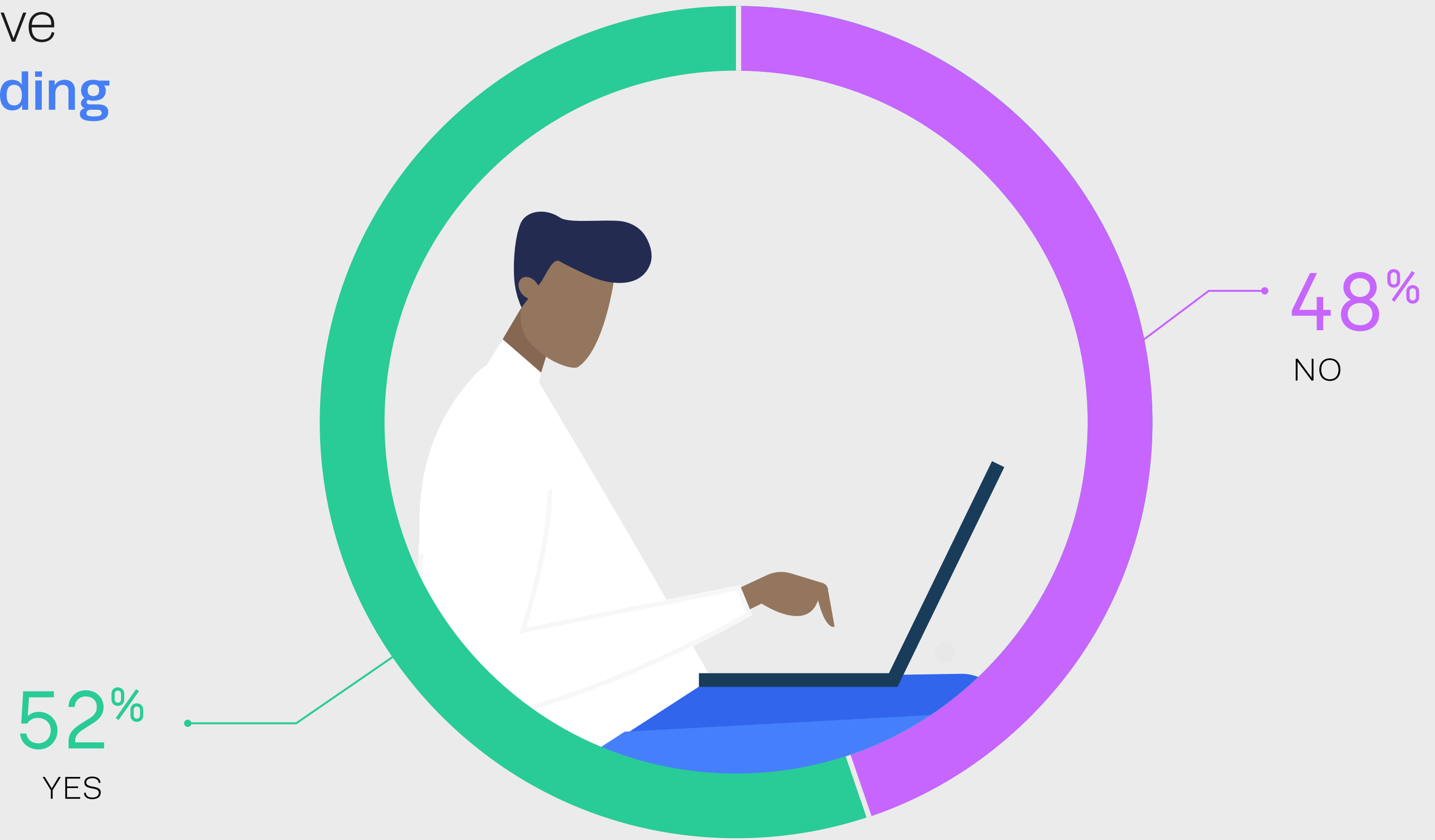
Where would you rank your organisation with regards to **PropTech adoption** across every work stream and service, on a **scale of 1-10**, where 1 is no adoption and 10 is fully adopted?



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



10 Do you feel you have a **good understanding** of **PropTech**?

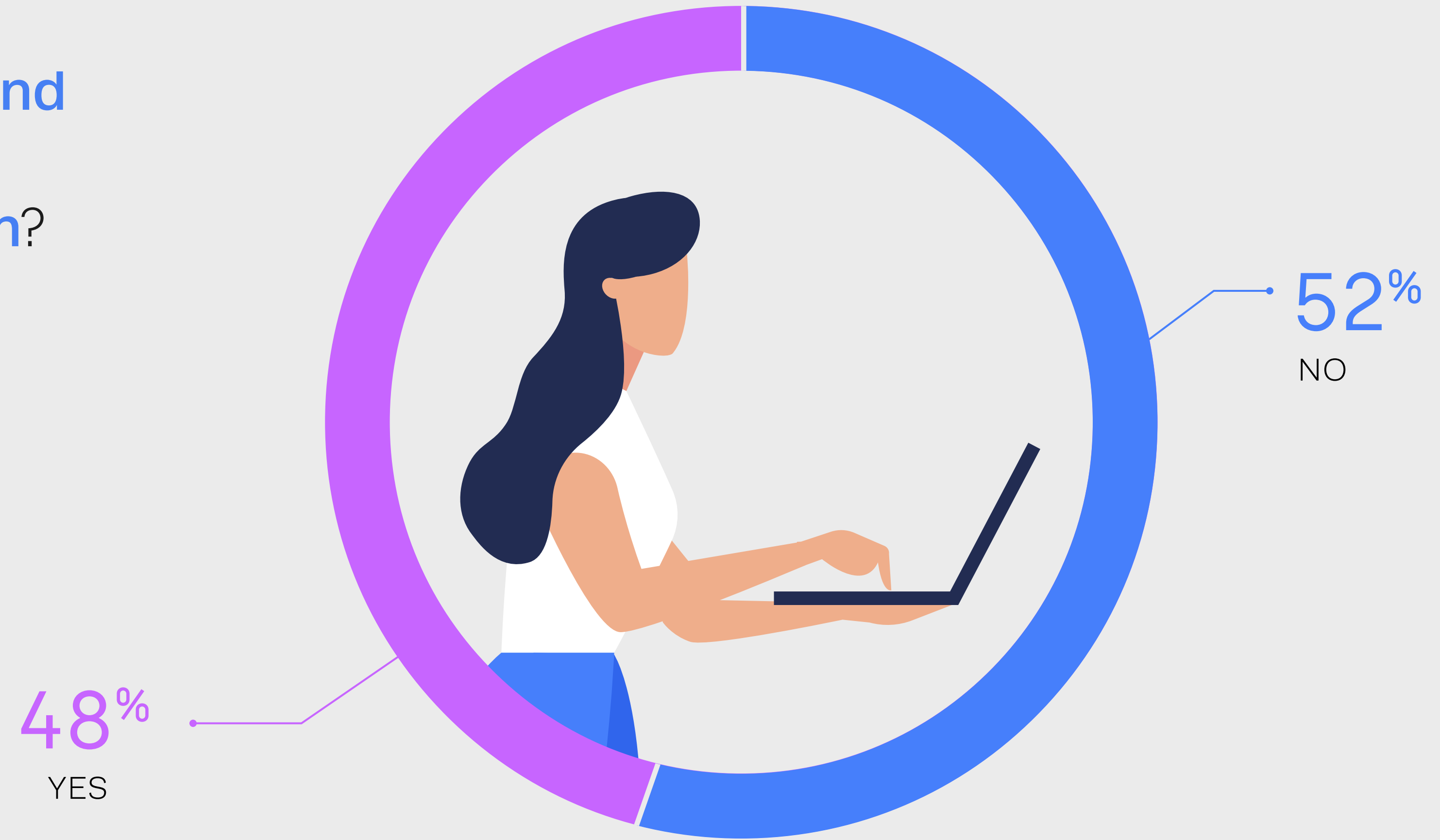


11

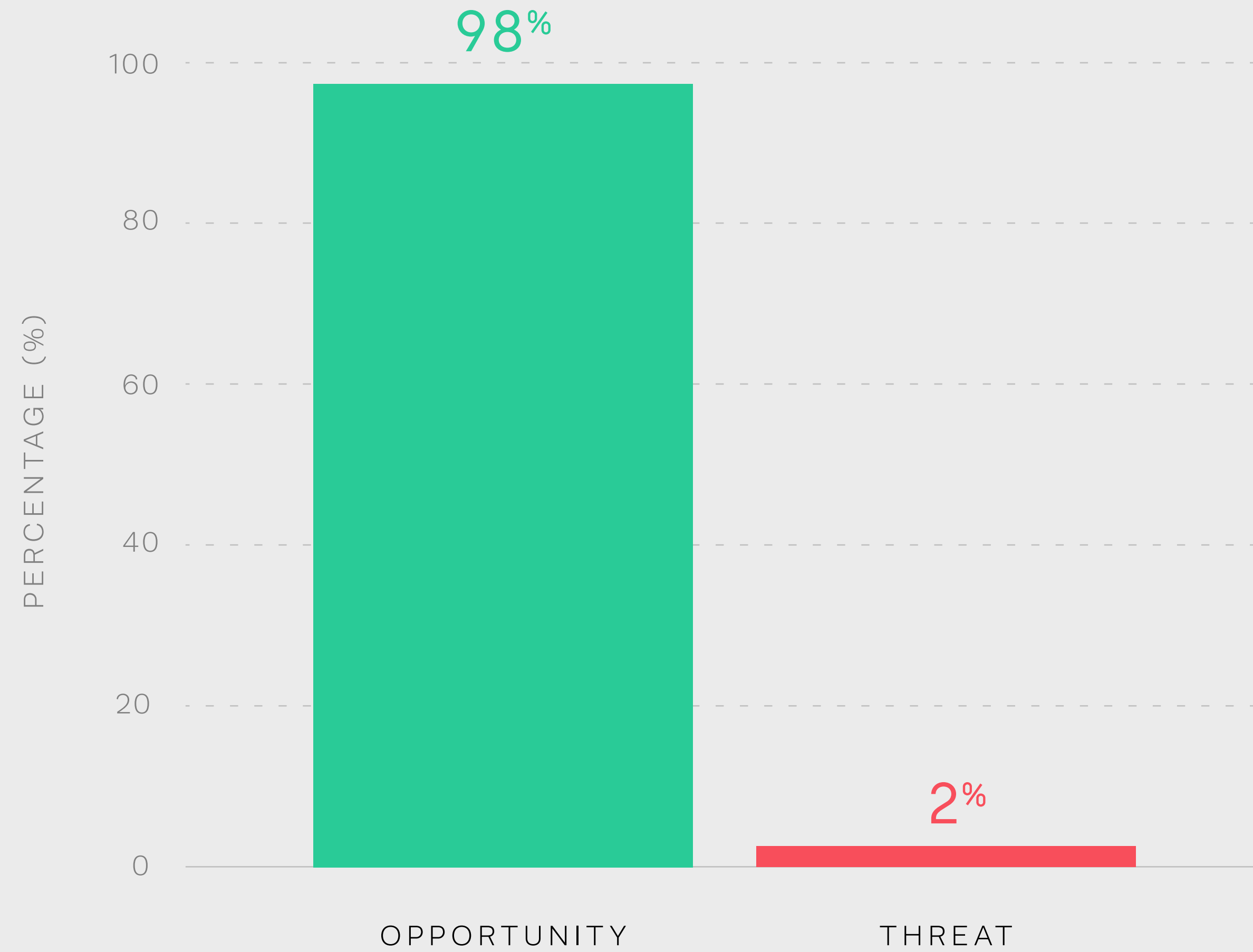
Does the organisation you work for **invest heavily** in **PropTech** and **related training**?



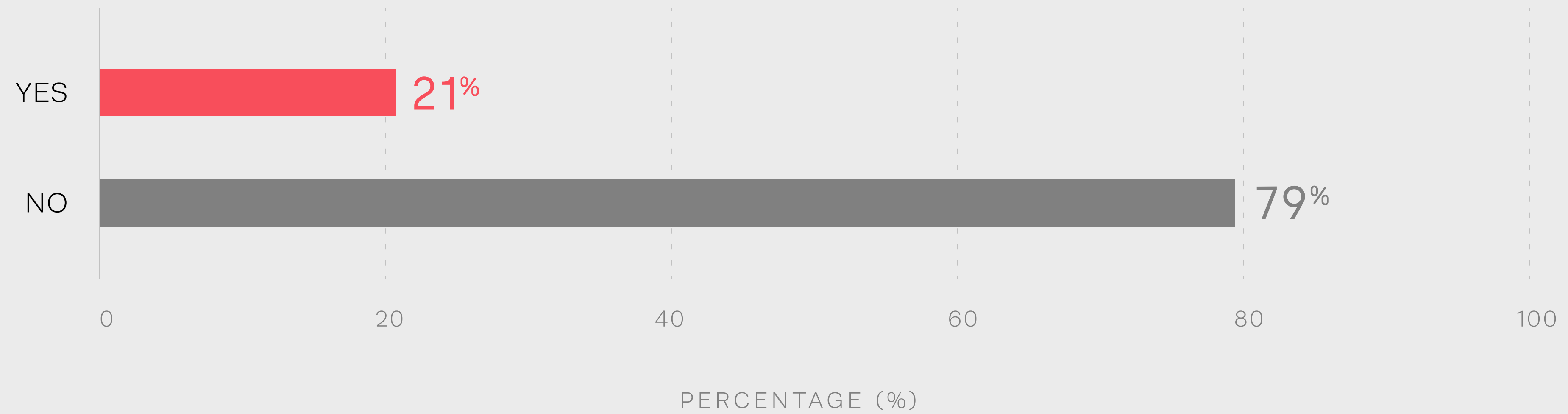
12 Do you have the **necessary skills and expertise** to fully embrace **PropTech**?



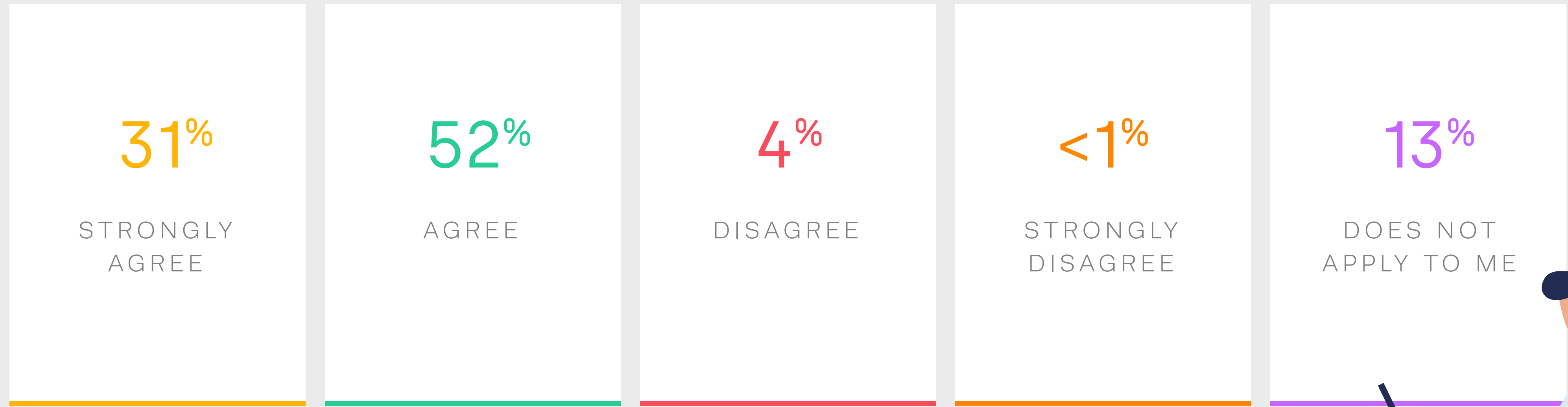
13 In relation to your role do you see **PropTech** as an **opportunity** or **threat**?



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

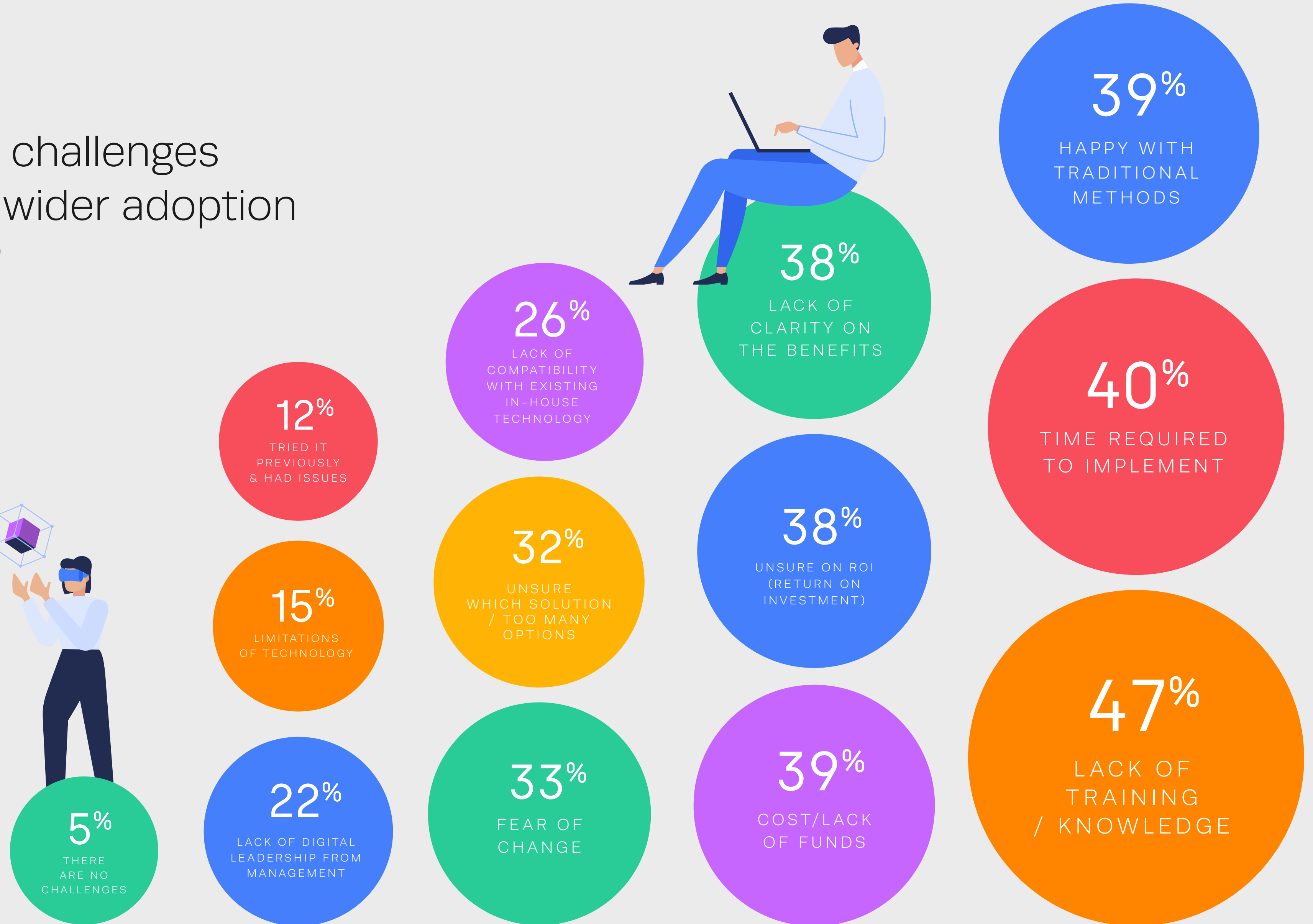


15 Will **PropTech** increase productivity?



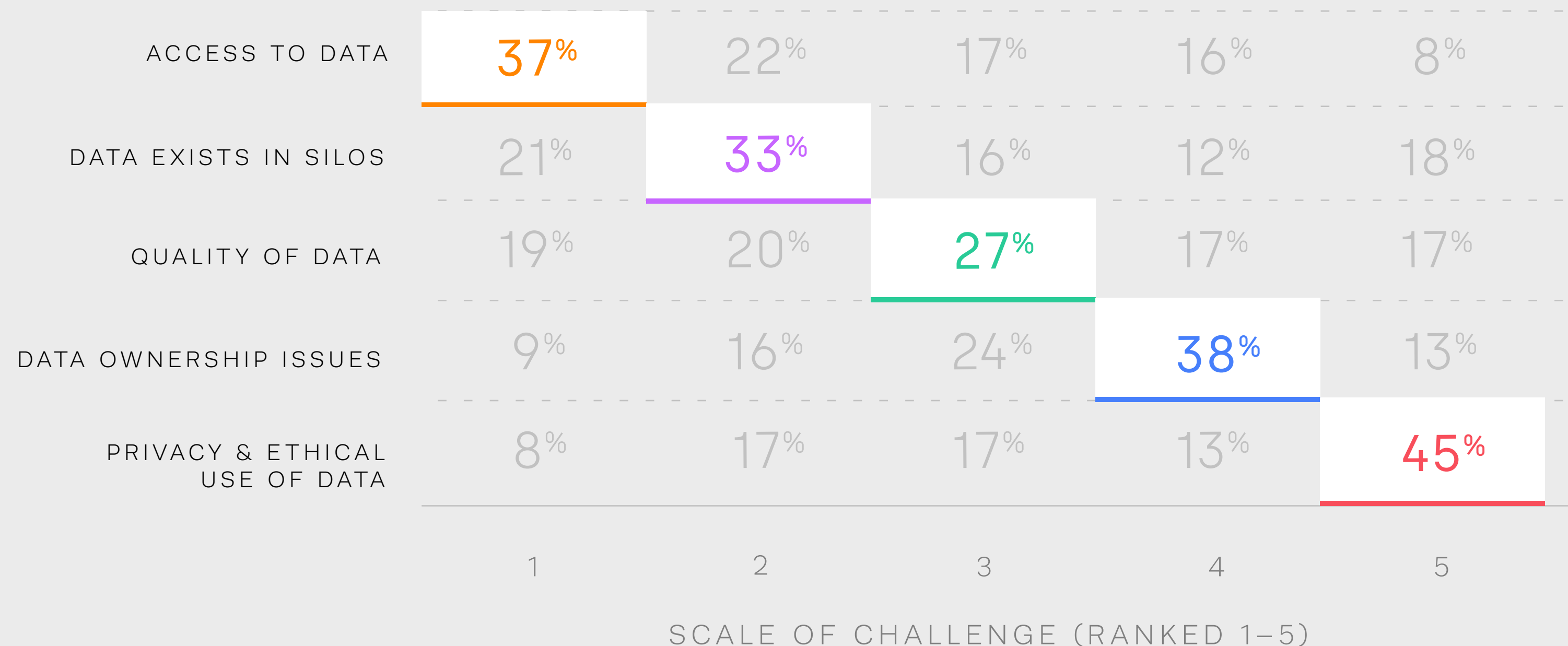
16

What are the challenges holding back wider adoption of PropTech?

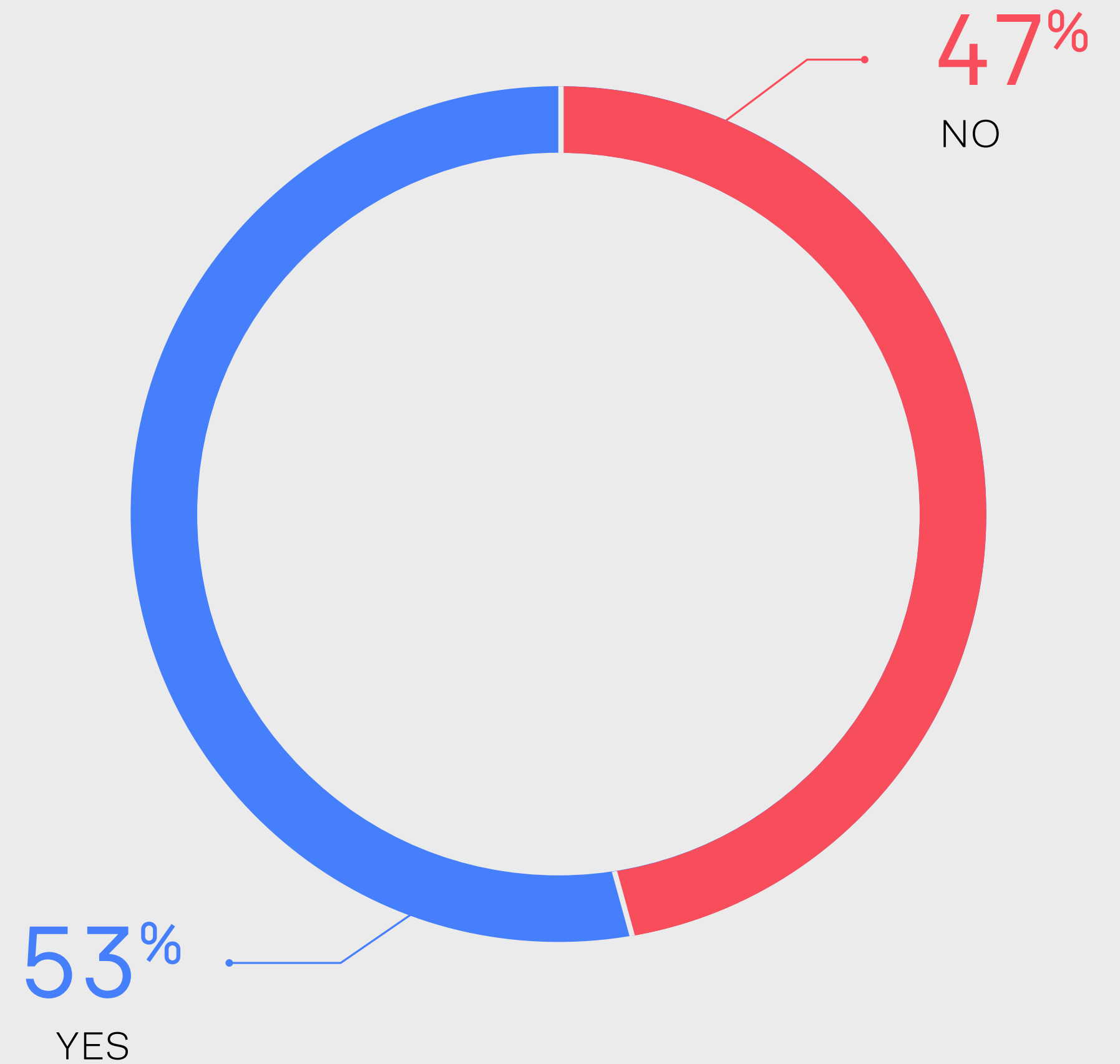


17 What do you think will be the **major challenges** facing the sector and its increased reliance on data?

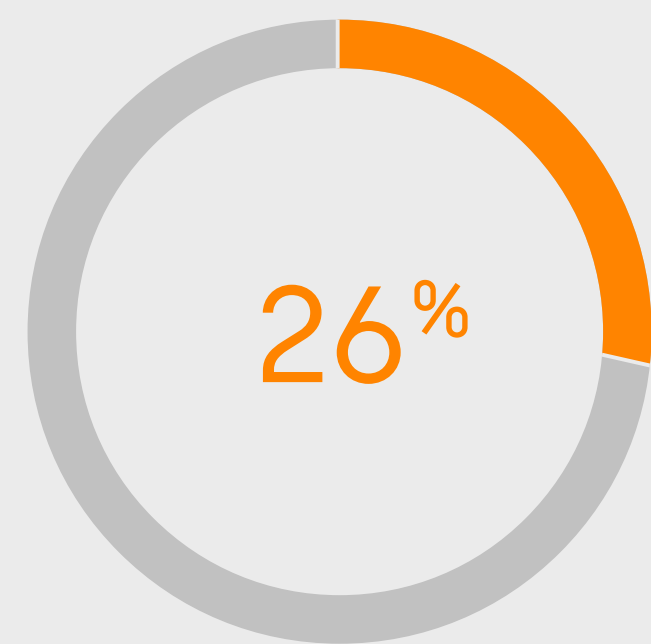
Ranked in order, 1 being the lowest challenge and 5 the highest challenge.



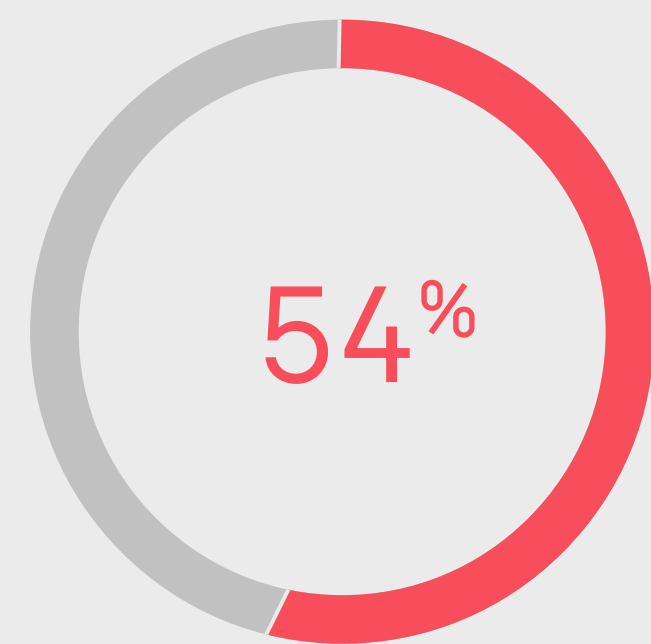
18 Do you feel your organisation is **well positioned** to leverage maximum value and insights from its data?



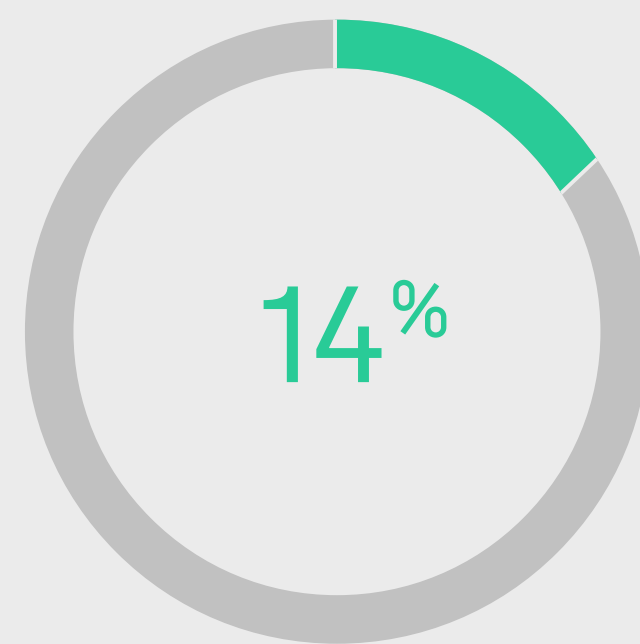
19 The **ethical use of data** within the sector will be a significant issue in the future



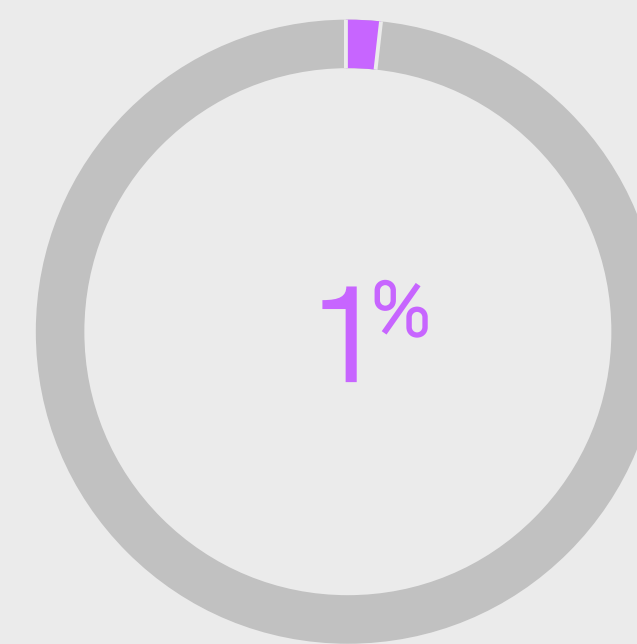
STRONGLY
AGREE



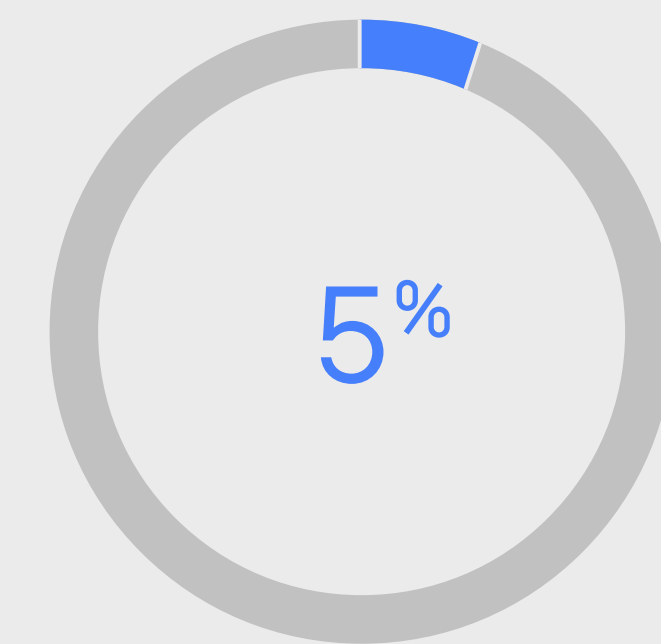
AGREE



DISAGREE

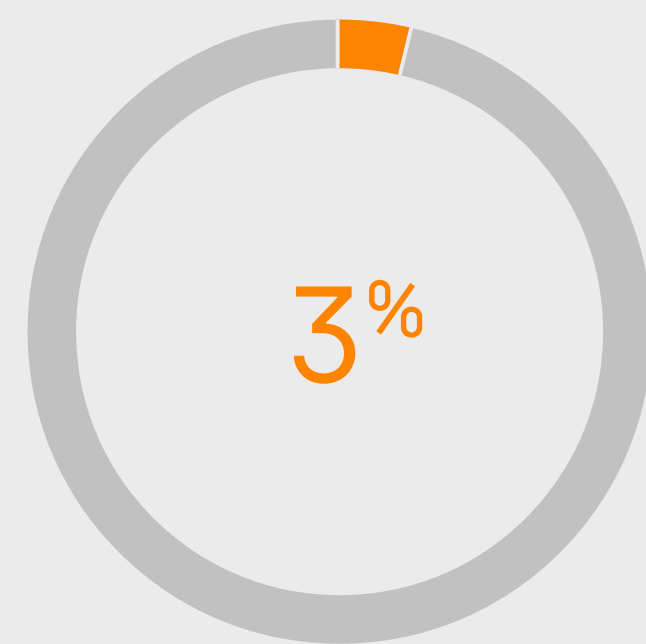


STRONGLY
DISAGREE

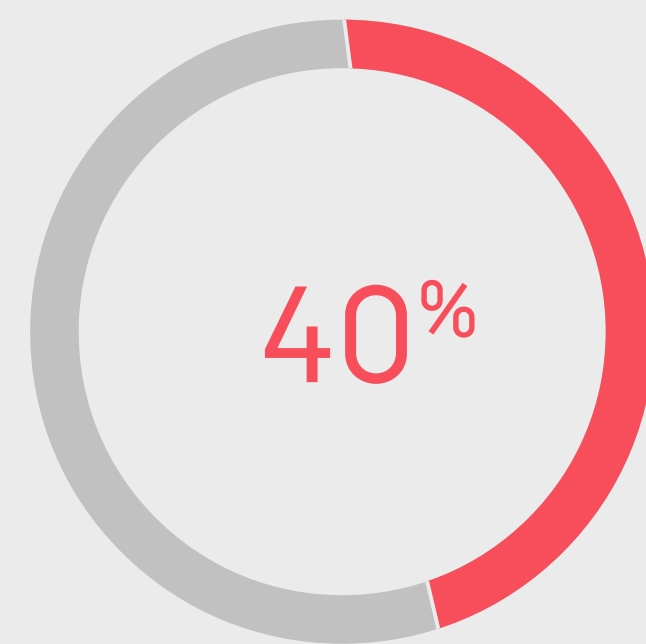


DOES NOT APPLY
TO ME

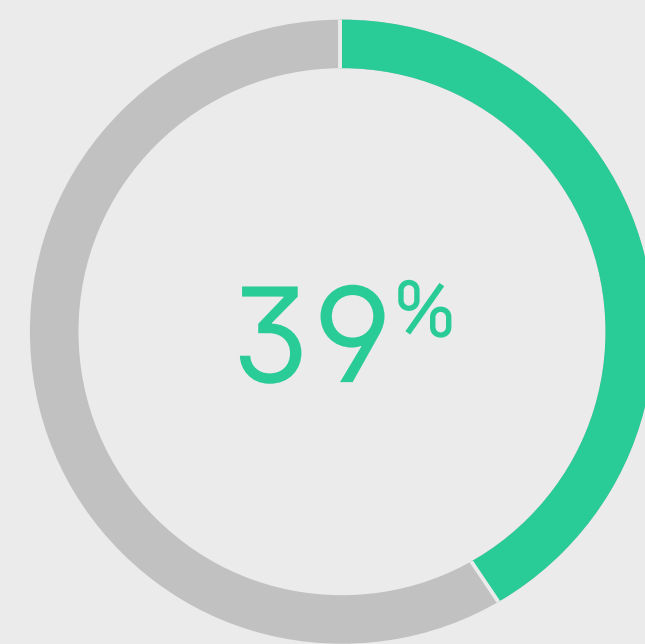
20 The sector has done enough to **ensure the ethical use of data.**



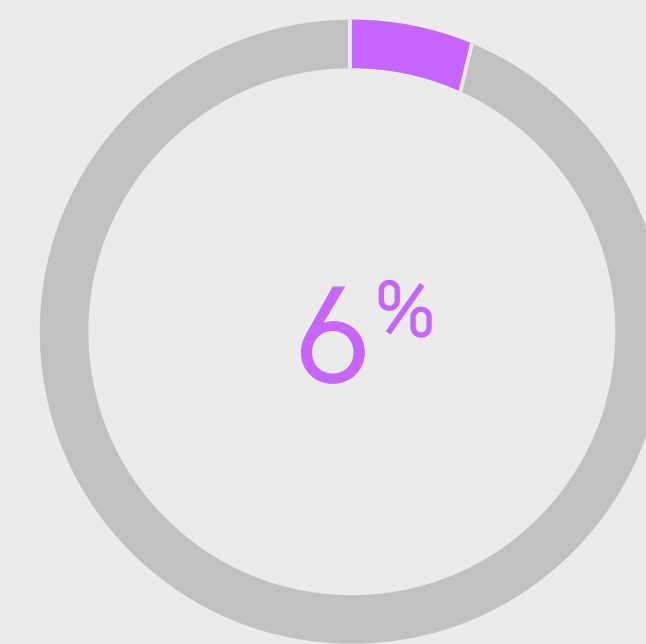
STRONGLY
AGREE



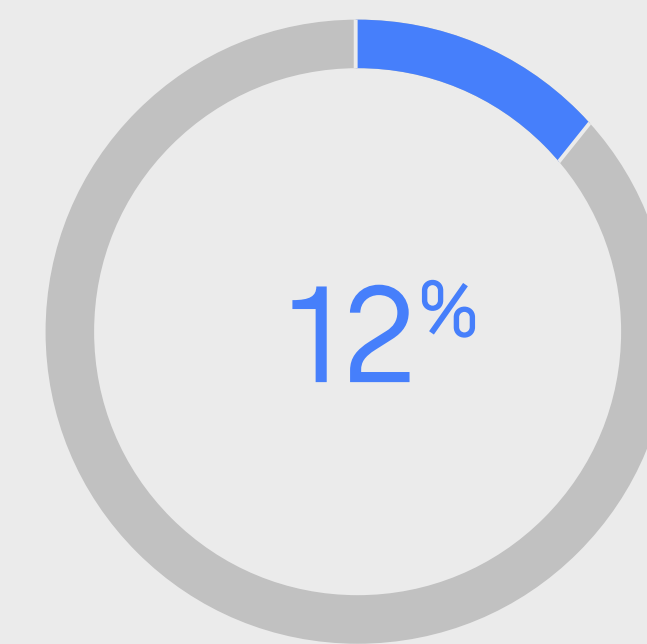
AGREE



DISAGREE



STRONGLY
DISAGREE



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 unprecedented 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 witness 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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