

Department of Housing and Public Works Policy Coordination and Industry Engagement Consultant Survey – September Quarter 2016



Commencing January - March quarter 2011, Policy Coordination and Industry Engagement, Building Industry and Policy commissioned market research fieldwork company, I-view, to undertake quarterly surveys which identify and track key issues among consultants working in the building and construction industry. This report presents the key findings from the most recent survey conducted for the second quarter 2016 (April - June), incorporating findings from all previous surveys.

Methodology

I-view conducted computer-assisted telephone interviews (CATI) with consultants listed with the Department of Housing and Public Works (HPW) Prequalification (PQC) System for the building industry. As with the Contractor Survey, the department provided a listing of consultants by PQC level, region and type of the work the firm performs to be used for sampling. Phone interviews were conducted between 12 and 16 September 2016 with 60 consultants randomly selected. The questionnaire used for the survey is attached as Appendix A.

Highlights

Consultants believed that on average they were operating at 70% of their full capacity, a slight increase on the previous quarter.

In the most recent quarter over a third (40%) of consultants said their workload had *increased*, and half (50%) stated that their workload *stayed the same*. Ten per cent (10%) indicated their workload had decreased (5% *slightly decreased* and 5% believed their workload had *considerably decreased*).

When asked to forecast their workload for the upcoming quarter, 47% predicted their workload would *increase*. Over a third (38%) said their workload would *stay the same*. Twelve per cent (12%) expected their workload to *slightly decrease*, with no consultants stating that they expected a *considerable decrease* in the next three months.

Over three quarters (77%) of consultants did not expect difficulties in employing staff; 23% of consultants were expecting difficulties, with no consultants indicating that they were *not sure*.

The majority of consultants anticipated their consultant fees would *stay the same* (73%), with 12% of consultants expecting a *decrease* and an *increase* respectively.

A large majority of consultants (70%) expected their firm would *maintain* staff numbers over the coming quarter, 28% of respondents anticipated an *increase* in staff numbers while no consultants were expecting a *decrease* in staff numbers.

An average of 51% of projects conducted used online programs, an 11% increase on the previous quarter. An average of 69% of consultant work was submitted to the public sector electronically, and on average, 74% of consultant work was submitted electronically to the private sector.

Almost half (45%) of consultants were *satisfied* with web collaboration systems, 10% said they were *very satisfied*, while 17% were *neither/nor satisfied* and 10% of the consultants were either *unsatisfied or very unsatisfied*. In total 18% indicated that they had *never used* web collaboration systems.

Of the 60 consultants, 58% were not currently experiencing any difficulties in finding work, while almost a quarter (23%) of consultants said they were experiencing difficulties in finding work, 18% of those who participated in the research reported they were *somewhat* experiencing difficulties.

On average 33% of consultants' workloads had been for the government. The breakdown by level outlined 34% was for *local government*, 56% for *State government*, and 10% for the *Federal government*.

Consistent with previous quarters, the sample of consultants were comprised of a majority of a majority of consultants based in Brisbane (65% of consultants), with the majority at PQC Level 3 (77%



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of consultants). The largest proportion of consultants conducted Building Designer/Architecture work (40% of consultants) and the majority worked in the residential houses (25% of consultants). See Appendix B for a detailed summary.

Results

Current and future workloads

On average, the 60 consultants indicated they were operating at 70% of their full capacity for the September 2016 quarter, an increase of 3% from the previous quarter.

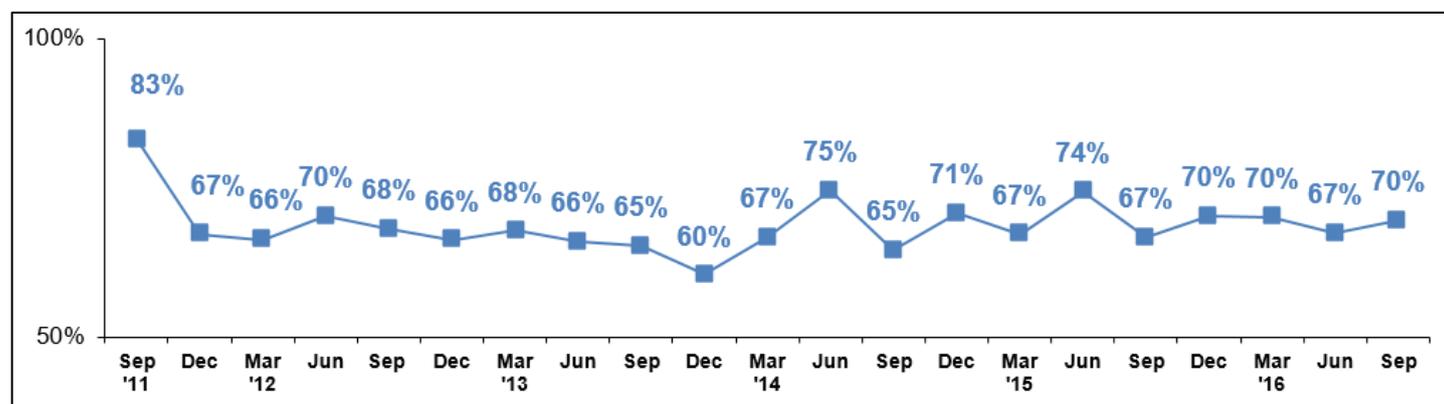
Chart 2 shows that in the past three months just over a third (40%) of consultants said their workload had *increased*, while half (50%) believed their workload had *stayed the same*. Ten per cent (10%) recorded their workload had *decreased* (5% *slightly decreased* and 5% *considerably decreased*).

- Of those consultants in the Building Designer/Architecture industry, 58% believed there was an increase in workload over the past three months, though 33% of consultants said their workload stayed the same. Less than ten per cent (8%) of consultants indicated their workload had decreased.

Consultants were then asked to forecast their workload over the next quarter, 47% predicted their workload would *increase*. Almost half (38%) said their workload should *stay the same*. Twelve per cent (12%) expected their workload to *slightly decrease*, with no consultants expecting a *considerable decrease* over the next three months. See Chart 3.

- The Building Designer/Architecture consultants were most likely to anticipate that their workload would increase (50% of consultants predicted an *increase*, 25% expected their workload to *stay the same*). Twenty-one per cent (21%) of consultants believed their workload would be a decrease.

Chart 1 – Current workload capacity



Q2a. (asked from Sep 11) Thinking of the total volume of work you are able to undertake and 100% being unable to take on any further work, in percentage terms what would you currently be operating at? **Base:** All PQC consultants surveyed (Sep 16 : 60; Dec 15 : 63; Sep 15 - Sep 11 : 60) Figures are average percentages rounded.

Expected staff shortage in the next three months

When prompted to forecast the next three months, over three quarters (77%) of consultants did not expect difficulties in employing staff and 23% of consultants were expecting difficulties. Refer to Chart 4.

Of the *Building Designer/Architecture* consultants, 83% did not expect to have difficulties in employing staff over the next quarter and 16% were expecting difficulties.

Consultants anticipating difficulties over the next quarter were then asked to foresee the disciplines that would have difficulties in employing staff. As per previous quarters, *Building Designer/Architecture* was the most selected. See Table 1.



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Consultant fees for the next three months

The majority of consultants anticipated their consultant fees would *stay the same* (73%), with 12% of consultants expecting a *decrease* and an *increase* respectively. See Chart 5.

- Of the *Building Designer/Architecture* consultants, 67% expected their consultant fees to *stay*

the same, with 17% of consultants expecting an *increase*, and 13% expecting a *decrease*.

Current staffing intention

A large majority of consultants (70%) expected their firm would *maintain* staff numbers over the coming quarter, 28% of respondents anticipated an *increase* in staff numbers with no consultants expecting a

decrease in staff numbers. See Chart 6.

- From the respondents in the *Building Designer/Architecture* consultants the vast majority (79%) believed they would *maintain* staff numbers, while 21% expected an *increase* in staff numbers and no consultants expected a *decrease*.

Table 1 - Disciplines where staff shortage is expected in the next three months

	Sep 16%	Jun 16%	Mar 16%	Dec 15%	Sep 15%	Jun 15%	Mar 15%
Building Designer/Architecture	35	42	36	66	33	18	30
Building Project Management	21	7	5	-	6	45	10
Landscape Architecture	7	7	-	-	13	-	-
Engineering – Civil/Structural	7	-	10	13	20	9	-
Engineering – Services (mechanical, electrical, lifts, security, communication, data)	21	21	5	-	6	-	-
Engineering – multi disciplinary	-	7	5	-	-	-	-
Environmental Scientist/Certified Environmental Practitioner	-	-	5	-	6	-	-
Geotechnical	-	-	-	-	13	-	10
Building Surveyor	7	-	-	6	-	-	-
Quantity Surveyor	-	7	5	-	-	9	20
Licensed Surveyor	7	7	5	-	13	9	-
Other	-	14	31	6	-	9	10

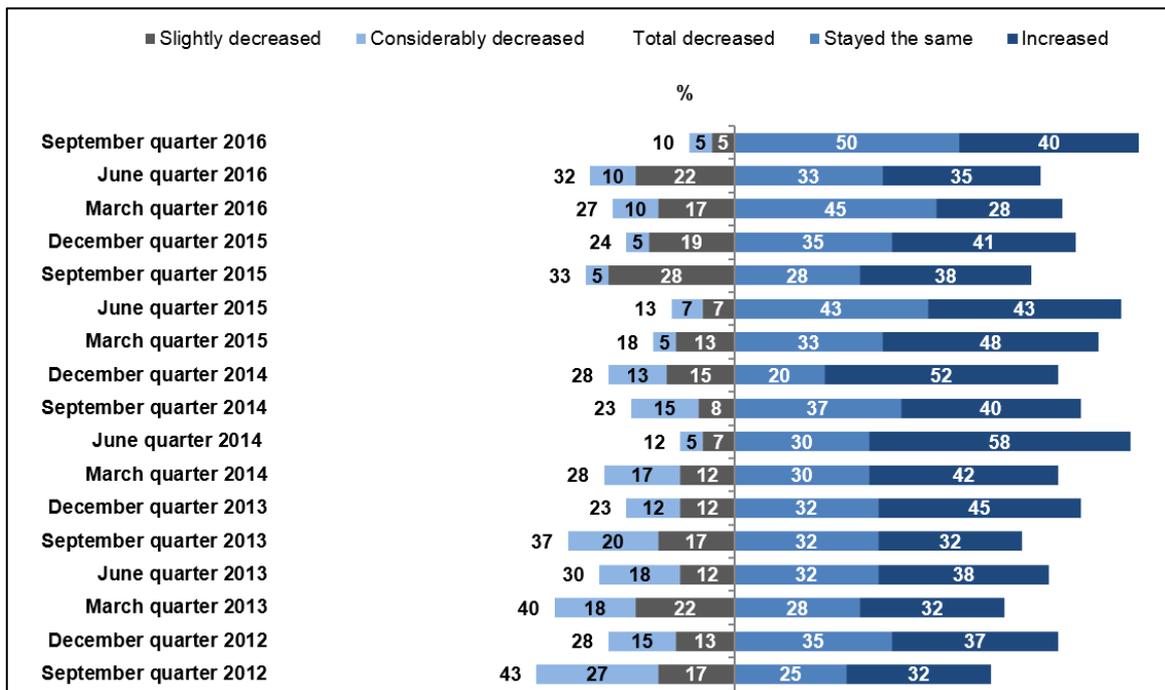
Q4b. If there is an expected difficulty in employing staff, which disciplines do you think you will struggle to fill in?

Base: Those consultants who expect difficulty in employing staff in the next three months at Q4a (Sep 16 : 14; Mar 16 : 19; Dec 15 : 15; Sep 15 : 15; Jun 15 : 11; Mar 15: 10; Dec 14 : 13; Sep 14 : 15; Jun 14 : 14 Mar 14 : 7).

Notes: Percentages were calculated from the totals who answered "Yes" to Q4a. Q4b allows multiple responses.



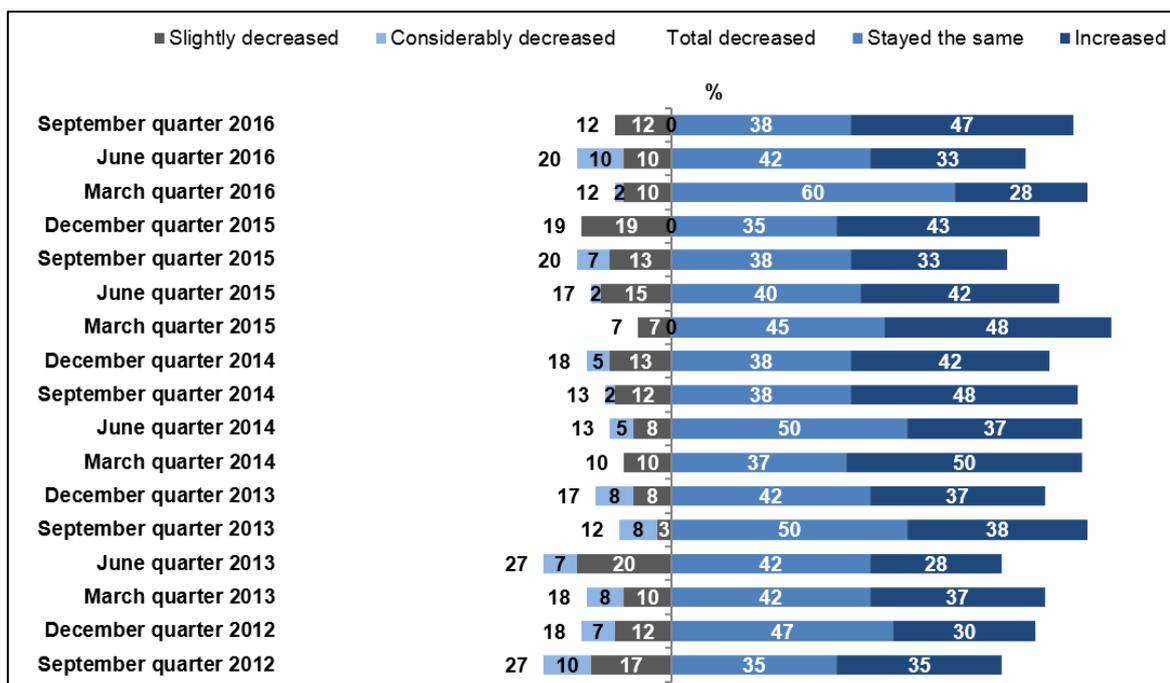
Chart 2 - Change in workload in past three months



Q3a. In the past three months do you think your workload has...?

Base: All PQC consultants surveyed (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60) Note: Figures may not add due to rounding; "Not sure" percentages are not shown.

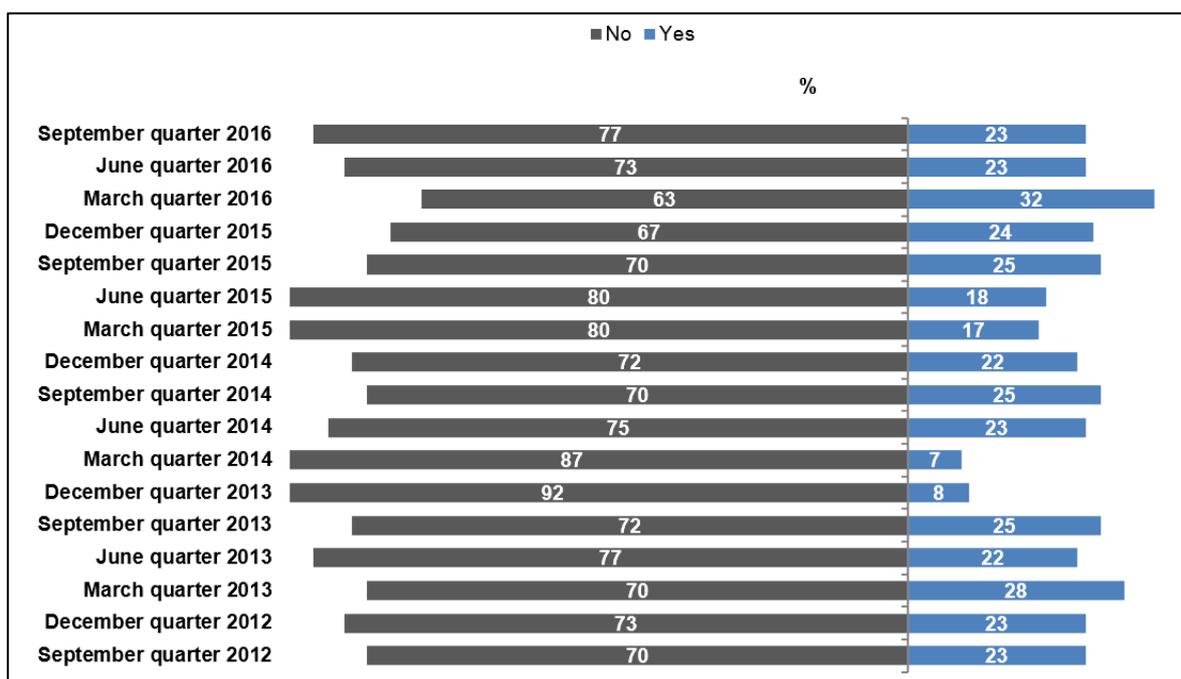
Chart 3 - Expected change in workload in next three months



Q3b. In the next three months do you think your workload will...?

Base: All PQC consultants surveyed (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60) Note: Figures may not add due to rounding; "Not sure" percentages are not shown.

Chart 4 – Expected difficulty employing staff in the next three months



Q4a. In the next three months do you think you will have difficulty employing staff?

Base: All PQC consultants surveyed (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60). **Note:** Figures may not add due to rounding; "Not sure" percentages are not shown.

Use of online programs

As shown in Chart 7, an average of 51% of projects conducted used online programs, an 11% decrease on the previous quarter. An average of 69% of consultant work was submitted to the public sector electronically, and on average, 74% of consultant work was submitted electronically to the private sector.

Almost half (45%) of consultants were *satisfied* with web collaboration systems, 10% said they were *very satisfied*, while 17% were *neither/nor satisfied* and 10% of the consultants were either

unsatisfied or very unsatisfied. In total 18% indicated that they had *never used* web collaboration systems. See Chart 8.

Difficulties finding work

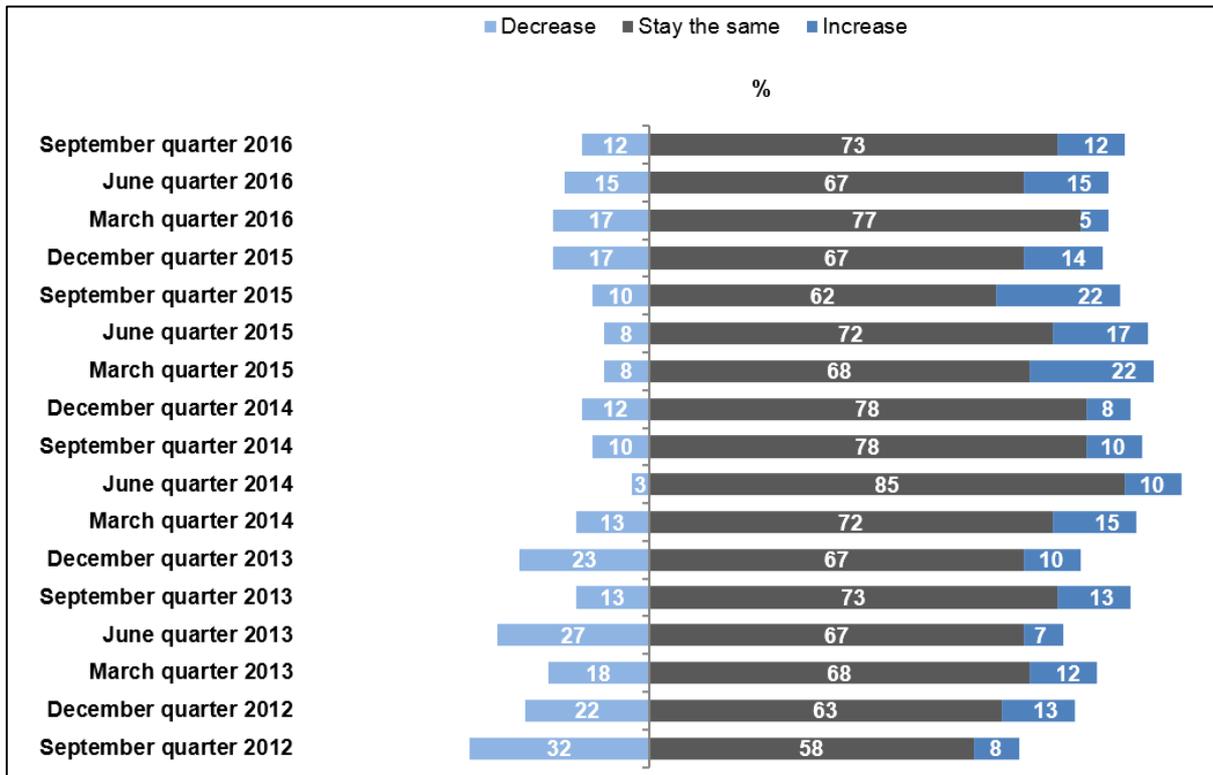
Fifty eight per cent (58%) of the respondents were not currently experiencing any difficulties in finding work, while almost a quarter (23%) of consultants said they were experiencing difficulties in finding work, 18% of those who participated in the research reported they were *somewhat* experiencing difficulties. See Chart 9.

- Half of all *Building Designer/Architecture* consultants (50%) indicated that they were experiencing difficulties finding work, with 29% *somewhat* experiencing difficulty, and 21% indicating that they were having difficulty in finding work.

Government work

For the third quarter of 2016, 33% of consultants' workloads had been for the government. On average, 34% was for *local government*, 56% for *State government*, and 10% for the *Federal government*. See Chart 10 and Chart 11.

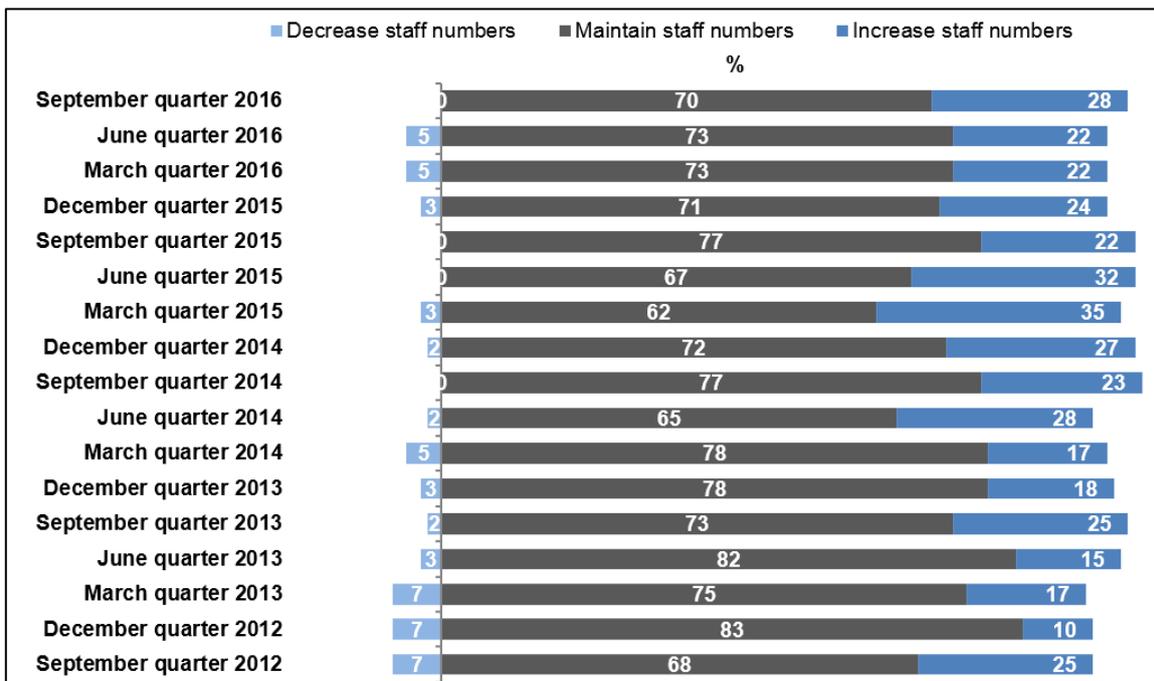
Chart 5 - Expected change in consultant fees in the next three months



Q5. In the next three months do you think consultant fees will generally..?

Base: All PQC consultants surveyed (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60). **Note:** Figures may not add due to rounding; "Not sure" percentages are not shown.

Chart 6 - Staffing intention

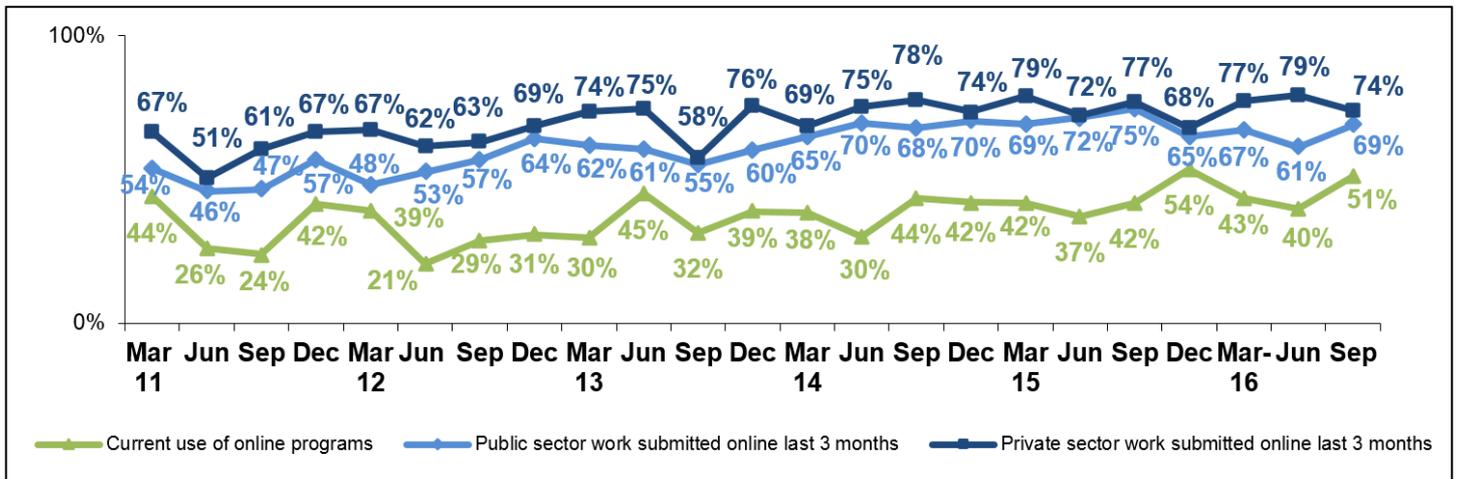


Q6. At present, is your firm looking to increase/decrease/maintain staff numbers?

Base: All PQC consultants surveyed (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60) **Note:** Figures may not add due to rounding; "Not sure" percentages are not shown.



Chart 7 - Use of online programs



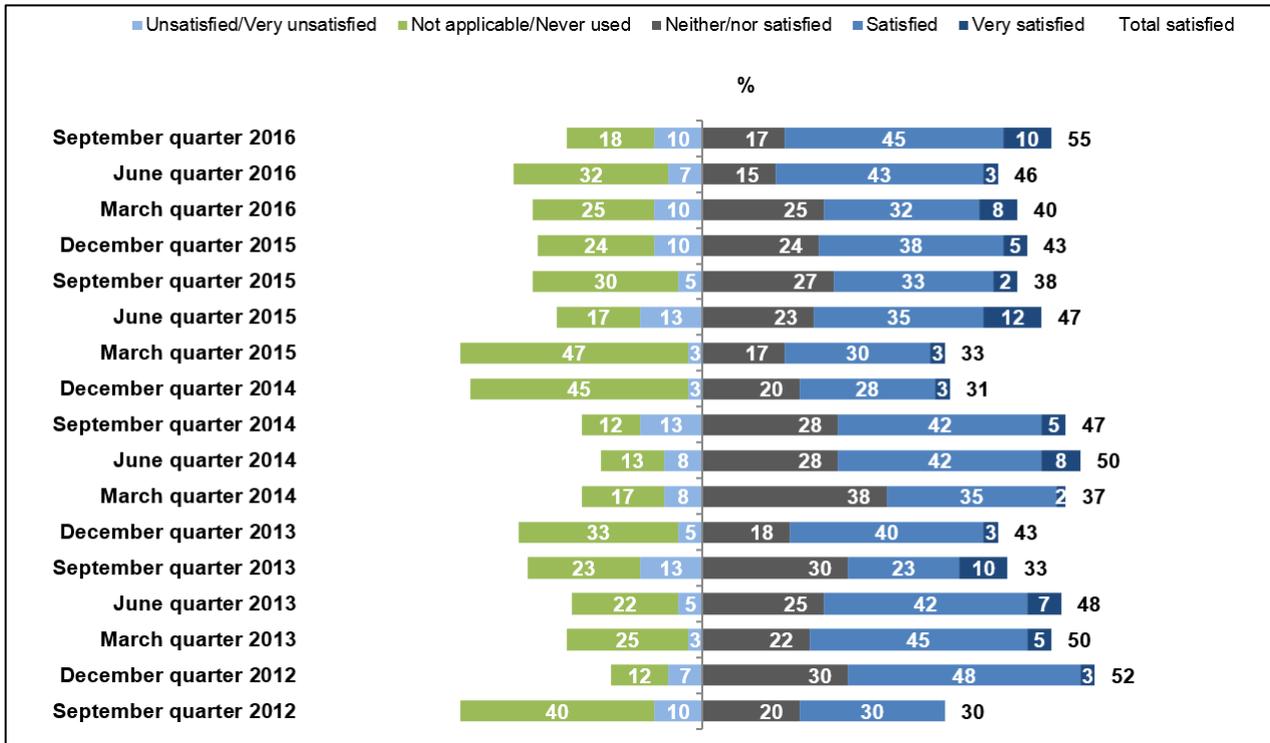
Q7. What percentage of your projects involves the use of online programs?

Q8a. In the last three months, what percentage of your consultancy submissions for public sector work was submitted electronically?

Q8b. In the last three months, what percentage of your consultancy submissions for private sector work was submitted electronically?

Base: All PQC consultants surveyed (Sep 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60). Note: Figures are average percentages rounded.

Chart 8 - Satisfaction with web collaboration systems

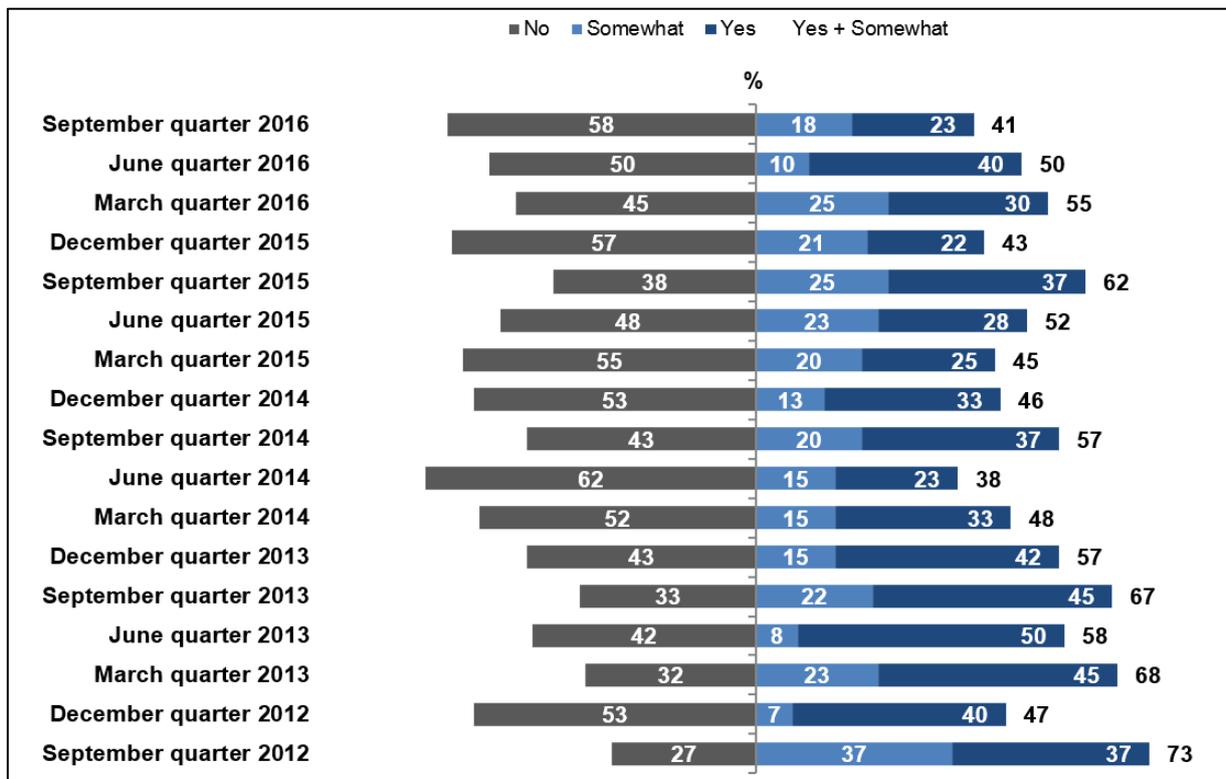


Q9. How satisfied are you with web collaboration systems?

Base: All PQC consultants surveyed (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60). Note: Figures may not add due to rounding.



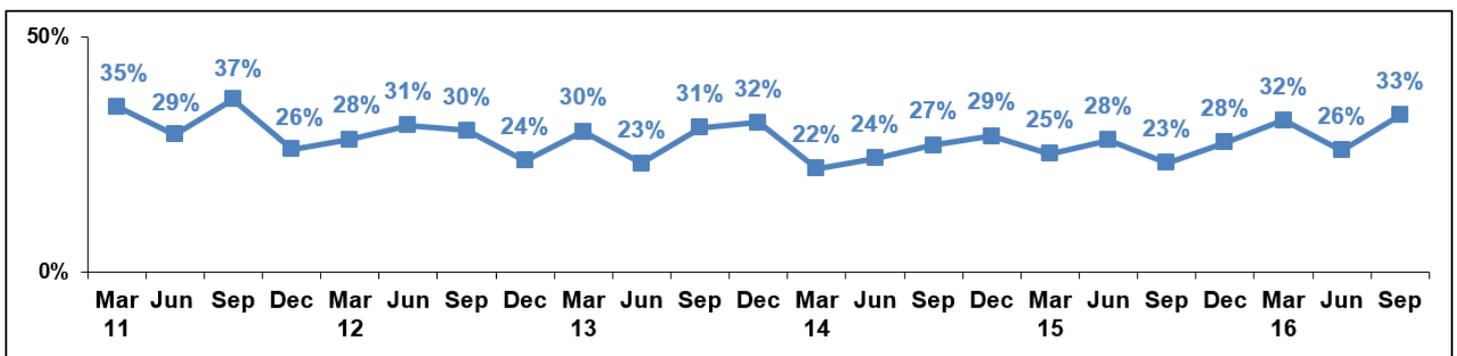
Chart 9 - Overall difficulty experienced in finding work at current



Q10. At an overall level, are you currently experiencing difficulties in finding work?

Base: All PQC consultants surveyed (Sep 16 - Dec 15 : 63; Sep 15 - Mar 11 : 60). **Note:** Figures may not add due to rounding.

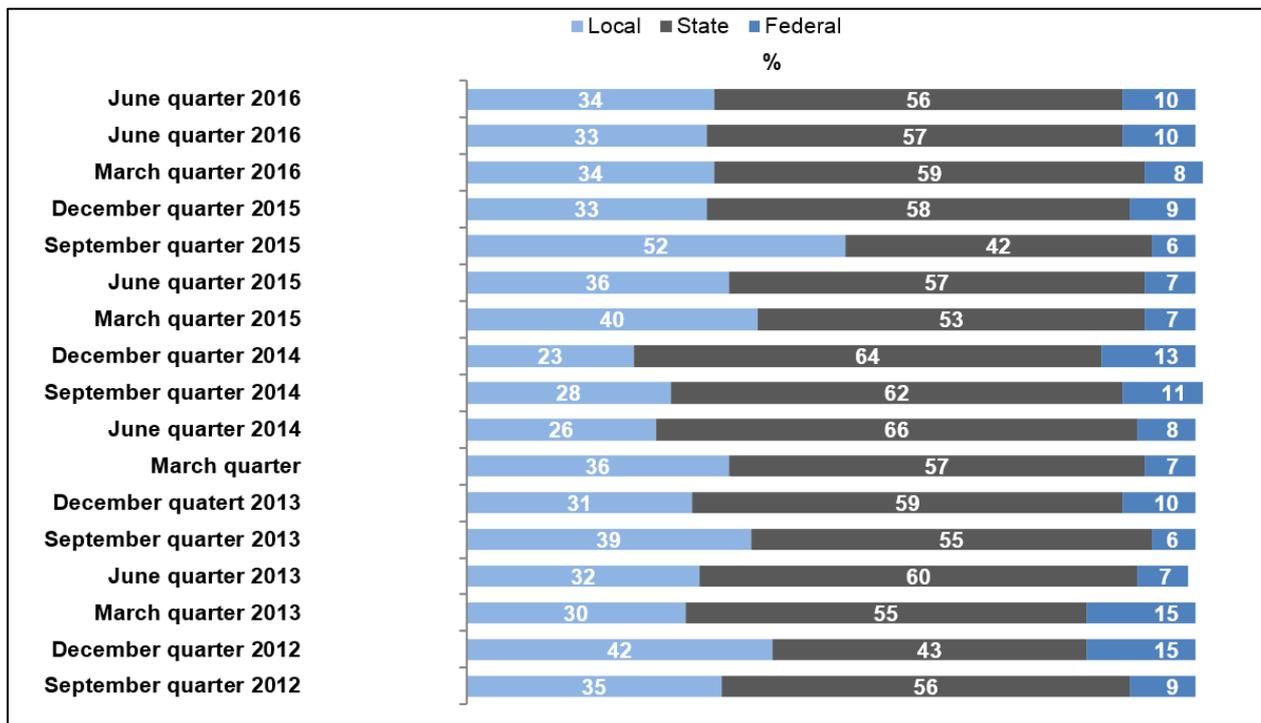
Chart 10 - Percentage of government work in the last three months



Q11. In the last three months approximately what percentage of your workload has been for the government?

Base: All PQC contractors surveyed (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 60) **Note:** Figures are average percentages rounded.

Chart 11 - Breakdown of government work undertaken in the last three months



Q12. As a percentage, how is the government work broken up among the 3 tiers of Government?

Base: All PQC consultants surveyed who reported doing government work (Sep 16 - Mar 16 : 60; Dec 15 : 63; Sep 15 - Mar 11 : 37-48).

Note: Figures shown are averages. Figures may not add due to rounding.

Good morning/afternoon.

My name is - _____

From _____

We are conducting a survey on behalf of the Department of Housing and Public Works to find out more about the current state of the building industry. The survey will take approximately five minutes and the results will be published in the Department's Building Industry Bulletin which you should be receiving quarterly by email.

1. What is the main type of Consultant work undertaken in your firm?

- Building Project Management
- Building Designer/Architecture
- Landscape Architecture
- Engineering – Civil/Structural
- Engineering – Services (mechanical, electrical, lifts, security, communication, data)
- Engineering – multi disciplinary
- Environmental scientist/Certified Environmental Practitioner
- Geotechnical
- Building Surveyor
- Quantity Surveyor
- Licensed Surveyor
- Other (please specify)

2. In what area of the construction sector are the majority of your current projects?

- | | |
|---|---|
| Residential Houses | 1 |
| Residential Multi-unit – low density | 2 |
| Residential Multi-unit – high density | 3 |
| Offices Multi-level | 4 |
| Offices Single story | 5 |
| Educational | 6 |
| Industrial | 7 |
| Hospital/Healthcare | 8 |
| Other (please specify) | 9 |

2a. Thinking of the total volume of work you are able to undertake and 100% being unable to take on any further work, in percentage terms what would you currently be operating at?

_____ %

[This question was added from September quarter 2011.]



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3a. In the past three months do you think your workload has...?

Increased	1
Slightly decreased	2
Considerably decreased	3
Stayed the same	4
Not sure (<i>do not read</i>)	5

3b. In the next three months do you think your workload will:

Increase	1
Slightly decrease	2
Considerably decrease	3
Stay the same	4
Not sure (<i>do not read</i>)	5

4a. In the next three months do you think will have difficulty employing staff?

Yes	1
No	2
Not sure (<i>do not read</i>)	3

IF NO, GO TO Q5

4b. If there is an expected difficulty in employing staff, which disciplines do you think you will struggle to fill?

Building Project Management	1
Building Designer/Architecture	2
Landscape Architecture	3
Engineering – Civil/Structural	4
Engineering – Services (mechanical, electrical, lifts, security, communication, data)	5
Engineering – multi disciplinary	6
Environmental scientist/Certified Environmental Practitioner	7
Geotechnical	8
Building Surveyor	9
Quantity Surveyor	10
Licensed Surveyor	11
Other (please specify)	12

5. In the next three months do you think consultant fees will generally:

Increase	1
Decrease	2
Stay the same	3
Not sure (<i>do not read</i>)	4



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6. At present, is your firm looking to:

Increase staff numbers	1
Decrease staff numbers	2
Maintain staff numbers	3
Not Sure (<i>do not read</i>)	4

7. What percentage of your projects involves the use of online programs¹?

_____ %

¹ An online program is a web application that is accessed over a network such as the Internet or an Intranet. The term may also mean a computer software application that is hosted in a web browser (i.e. eTender or web collaboration systems (Aconex, Team Binder, etc.).

8a. In the last three months what percentage of your consultancy submissions for public sector work are being submitted electronically?

_____ %

8b. In the last three months what percentage of your consultancy submissions for private sector work are being submitted electronically?

_____ %

9. How satisfied are you with web collaboration systems²?

Very satisfied	1
Satisfied	2
Neither/nor satisfied	3
Unsatisfied (<i>if so, why?</i>) / Very unsatisfied	4
<i>(If yes to unsatisfied, interviewer to prompt for feedback.)</i>	
Not applicable/never used	5

² Web Collaboration Systems are online document management and collaboration systems to assist companies with document control when running projects. The project information can be accessed by all project participants and is tracked by uploading documents and sending all emails through the system as a record of all approvals, drawings etc. Project documents can be downloaded as required in a secure environment. An example of a web collaboration system is Aconex.

10. At an overall level, are you currently experiencing difficulties in finding work?

Yes	1
No	2
Somewhat	3

11. In the last three months approximately what percentage of your workload has been for the government?

_____ %

IF GOVT WORK

12. As a percentage, how is the government work broken up among the 3 tiers of Government?

Local _____ %

State _____ %

Federal _____ %

Thank you for participating in this survey

Demographics *(interviewer only, record automatically)*

D1. Gender

Male	1
Female	2

D2. Region

Brisbane	01
Darling Downs	02
Far North	03
Fitzroy	04
Mackay	05
Moreton North/Sunshine Coast	06
Moreton South/Gold Coast	07
South West	08
North West	09
Central West	10
Northern	11
Wide Bay	12
Outside Qld	13

D3. PQC Level

Level 1	1
Level 2	2
Level 3	3
Level 4	4

D4. Postcode



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APPENDIX B

Demographic Profile

Gender

Male 78%

Female 22%

Base: 60

Region Number

Brisbane 39

Darling Downs 1

Far North 5

Fitzroy 3

Mackay 0

Moreton North/Sunshine Coast 5

Moreton South/Gold Coast 3

North West 0

Northern 4

South West 0

Wide Bay Burnett 0

Central West 0

Outside Queensland 0

Other 0

PQC Level Number

Level 0 1

Level 1 0

Level 2 9

Level 3 46

Level 4 4

Main type of consultant work undertaken

Number

Building Project Management 7

Building Designer/Architecture 24

Landscape Architecture 3

Engineering – Civil/Structural 6

Engineering – Services (mechanical, electrical, lifts, security, communication, data) 3

Engineering – multi disciplinary 1

Environmental scientist/ Certified Environmental Practitioner 4

Building Surveyor 3

Quantity Surveyor 2

Licensed Surveyor 3

Other (please specify) 4

Construction sector where majority of projects are

Number

Residential Houses 15

Residential Multi-unit – low density 2

Residential Multi-unit – high density 7

Offices Multi-level 0

Offices Single story 3

Educational 8

Industrial 4

Hospital/ Healthcare 11

Other (please specify) 8

Percentage of workload for government (local, state, federal) in past three months

Average 28%