working with **maber**

September 2020

summary of **survey findings**

Thank you!

Thank you for taking part in our recent survey.

We wanted to find out how our clients, contractors and fellow consultants feel about the current business climate and about us.

Along with knowing that the survey responses helped to raise £800 for NHS Charities Together, we thought that you might be interested to know what some of the results were.

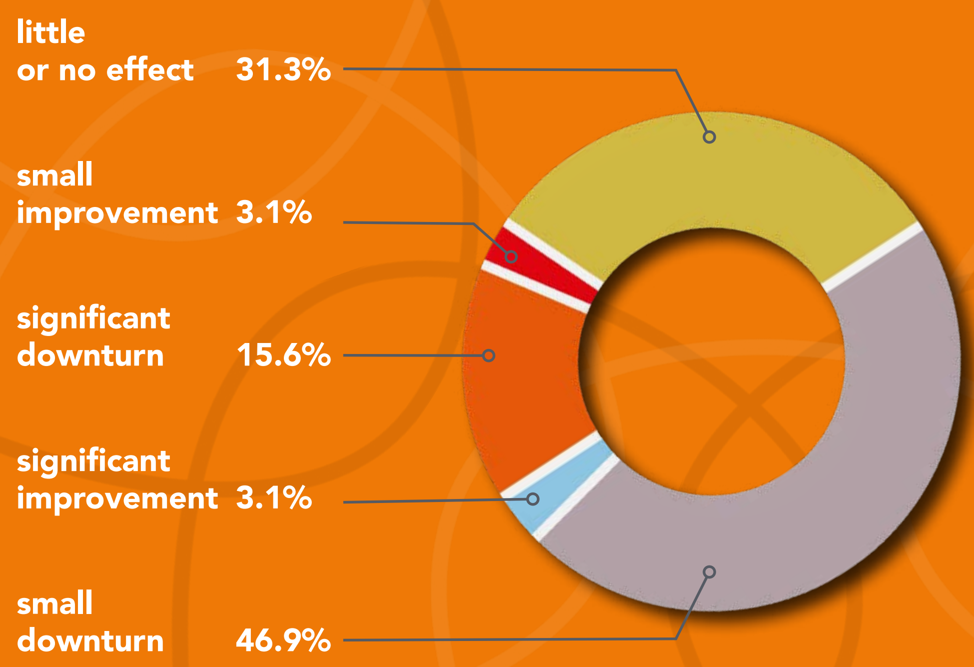
And £800 for NHS CHARITIES TOGETHER

Thank you!

Performance

We asked you what the effects of the COVID-19 pandemic have been so far on your activities.

Around 63% of you thought that the effects had been a small or significant downturn.



Changes for your business

We asked you to write about "The changes we foresee for our business over the next 6-18 months".

Challenges were identified regarding safe and socially distanced working in offices, on university campuses and on construction sites. Many answers made reference to anticipating or promoting **increased remote working**. This was frequently portrayed as a benefit and linked to **increased flexibility and agility.** The expected increase in remote working also included an expectation that meetings with clients, customers and project teams would be more frequently online rather than face-to-face. **A reduced need for offices and meeting rooms was proposed.** These changes were broadly considered to be positive.

Economic indicators were considered in many answers. Some contractors reported reductions in the project pipeline. A number of answers **proposed learning lessons from the past about recovery from previous downturns.** Concerns were raised about "single stage race-to-the-bottom tenders" which are "not sustainable for anybody". The delay in construction activity while commissioning clients assess the risks regarding development was a concern to some responders; coupled with the necessity to revisit contract programmes in light of increased H&S concerns. Work associated with **adapting workplaces or educational institutions** was identified as a potential source of work. The reshaping of some businesses through contraction or restructure was seen as an opportunity for capital projects, estate rationalisation, remodelling or disposals.

Inevitable contraction in some sectors like hospitality, sport and leisure were noted. The air travel sector and aircraft supply chain expected to shrink noting that it is unlikely we will return to 2019 flight volumes until 2023 at the earliest. Some answers anticipated the contraction of their business to focus on "core areas". However, other answers **identified the increase in digital skills as a growth area worthy of investment or predicted more diversification and specialist service offers.** One response suggested two commercial office projects had recently been put on hold and speculated that reduced demand for offices in future would affect the sector. **Manufacturers of construction products anticipated a reduction in demand** over the next 12 months but a return to pre-COVID-19 figures after that. **The logistics sector was identified as likely to grow** over the same period.

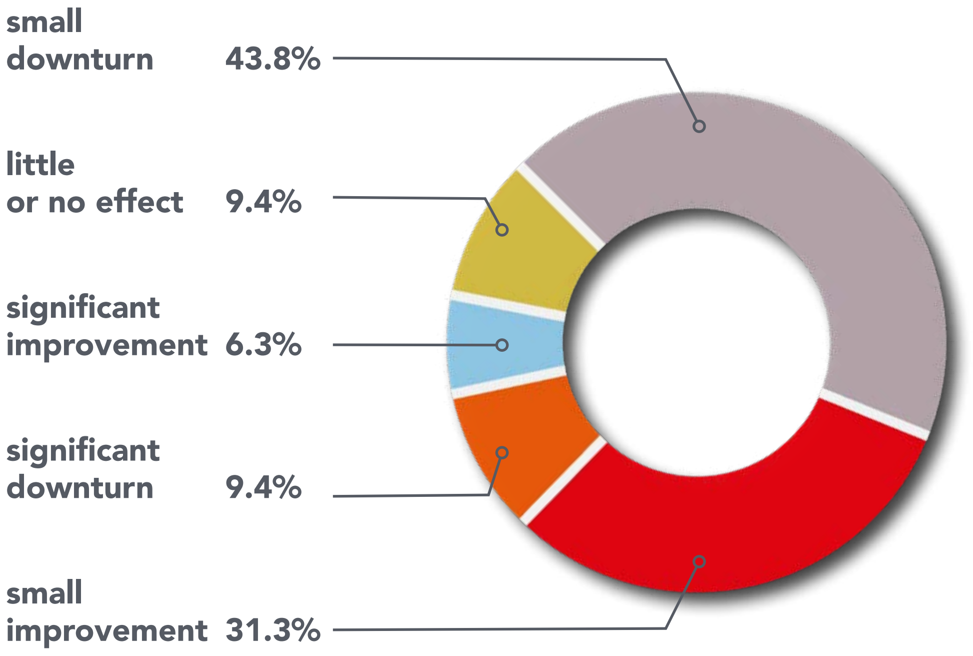
Methods of procurement for construction projects were considered in some responses. Increased use of the **Construction Management form was predicated and promoted as being "financially safer".** Ensuring the stability and liquidity of the supply chain and of clients was considered to be important. Answers from some public health sector clients suggested that increased future funding might drive an increase in capital projects. Reduced confidence among funders was suggested as creating the opposite effect for private sector developers, some of whom expected projects to slip. Others suggested that as money became cheaper, options for development would increase.

> *"A number of answers proposed learning lessons about recovery from previous downturns."*

Expectations

We asked you what your expectations were for performance over the next 6-18 months.

Just under half of you thought that there would be an improvement or no change to your performance.



What do you want architects to do for you?

We asked you to tell us how we, as architects, could most effectively help support your business over the next 6-18 months. Your answers depended a little bit on the sector you work in.

Our contractor clients and partners told us that sharing knowledge of project pipelines and potential opportunities was important. There was an invitation to get them involved early in projects to give advice about buildability, potential funding, material specifications and construction with COVID-19 in mind. **There was a recognition that early involvement does not guarantee delivering the scheme but a belief that it improves procurement chances and improves the end result for the client.** Learning lessons from previous recoveries, a point was made about working together to avoid the "2009 race to the bottom" that saw tenders won at 20% below cost creating volatility and unsustainable business practices. **It was suggested that architects should influence clients to move to 2 stage tenders to drive improved value and better pricing.**

"Some of our long term partnerships and working relationships were celebrated and seen as key attributes for the future."

Clients generally expected us to continue with our flexible working practices in line with their own journeys into more remote and online working. Designing, at least in the short term, for adaptations to make COVID-19 safe workplaces was encouraged.

The services we supply alongside architecture, like Computer Generated Imagery, master planning and information management were seen as important in a number of responses. **Some of our long term partnerships and working relationships were celebrated and seen as key attributes for the future.** A great quality of service along with proactivity progressing projects was noted several times as being very important.

Local Authorities wanted to see more feasibility work from us and **continuing early engagement with Development Control** to smooth schemes through the planning process.

University clients were interested in using the current hiatus in capital projects to **plan for the future by investing time in considering better ways of using buildings.**

Other consultants encouraged us to work with them more often. A Project Manager encouraged us to promote Construction Management as a procurement form to clients more often. Another PM encouraged architects generally to be more imaginative in creative solutions noting that "good design should not cost more". **Imaginative approaches were also called upon to drive projects forwards in an "era of uncertainty".** There was a call from a Quantity Surveyor to bring cost control to clients' attention sooner in the procurement cycle.

"Be patient ... and then be available"

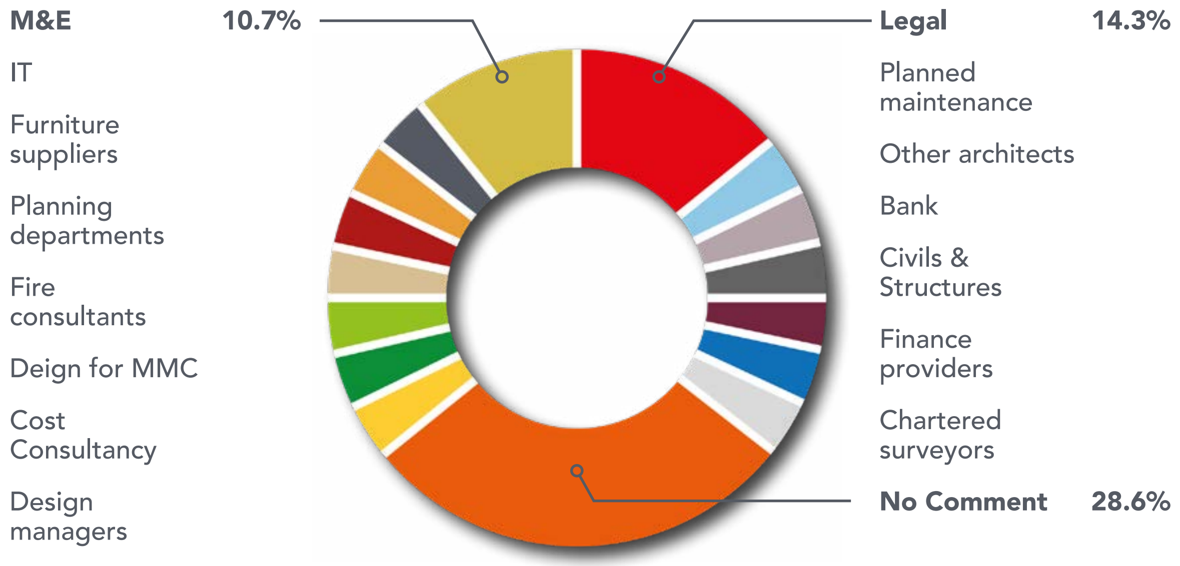
Developers noted that **short notice funding required sharp responses** and fast site appraisals with projects "shovel ready" quickly. One phrase that summed this up was **"be patient ... and then be available".** Some speculative work on feasibility studies was suggested as a helpful way of opening up projects and sites; particularly product development and response to the long term impacts of the current shifts in working and living. **Continuing to input at the cost planning stage with high quality and reliable information was considered an important aspect of driving up project confidence.**

There was a recognition that **we are well placed to help advise on future ways of working**, office environments, floor space requirements and spaces that support our working days and a request that we **get alongside our current clients to help them reconfigure and rationalise their own offices for the future**. We were also asked to share our views on how the sectors we work in are changing and adapting.

Frustrations

We asked you which professional services you were currently most frustrated with.

This is a way of trying to gauge what parts of the design or procurement process might benefit most from improved coordination and contributions.



Summary

Thank you so much to everyone who contributed to the "Working with maber" survey.

We have found your responses really valuable and in particular the insights you gave us into the way we compare with our competitors.

Although we haven't summarised those findings here, **we have listened carefully and we are developing even better ways of working together** that we hope you will start to notice over the coming months.

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