

National Platform Survey Outcomes

Key recommendations

- Maintain a focus on ‘bridging the performance gap’, energy efficiency and wider resource efficiency, and ‘Carbon’, especially carbon measurement
- Develop areas around the key demographic trends and what they mean for the industry, design for ‘wellbeing’
- Support and possibly corral the wider industry efforts to address the structural issues with the industry

Introduction

This note provides an overview of the key themes emerging from the tag cloud survey carried out for the National Platform from April to September 2012. Detailed analysis of the statistics is provided in the Appendix at the end of this note.

The survey used the overarching categories from the National Platform ‘Challenges and Research Priorities Initial Report’. For the purposes of this review however, some of the drivers have been re-grouped to create a more coherent set of priorities. The drivers included in the analysis were the 24 highest scoring drivers as at 6th September 2012.

Areas of current focus for National Platform, MBE KTN and TSB

From the analysis, it is clear that existing MBE KTN and TSB priorities continue to be important challenges for the industry. These issues are described in brief in the table below (yellow highlighting indicates a driver scoring in the top ten):

<p>Adaptation and resilience concerns</p> <p>Need for resilience to climate change</p> <p>Extreme weather conditions</p> <p>Increased risk of overheating</p> <p>A more balanced and consistent approach to sustainable development.</p> <p>Design in flexibility</p> <p>Ageing infrastructure assets</p> <p>Provide secure supply of energy, water and transport</p>	<p>Mitigation concerns</p> <p>Whole-life carbon in design</p> <p>Reducing emissions from existing building stock</p> <p>Shift from conventional energy generation to renewables</p> <p>Need for unified approach to carbon accounting</p> <p>Low demand for low-carbon new-build and retrofit</p> <p>Funding for transition to low-CO2 economy</p>
<p>Energy efficiency</p> <p>Resource efficient built environment</p> <p>Close gap between predicted and actual performance of buildings</p> <p>Improve energy efficiency of buildings</p> <p>Lack of clear responsibility for energy efficiency</p>	

It is clear from this that **energy efficiency** and **carbon emissions** are still top priorities among industry practitioners, with the challenge of **closing the gap** between predicted and actual performance, alongside a **resource efficient built environment**, scoring highest.

Further work on closing the performance gap is merited, alongside design work to improve energy efficiency as these two issues are intimately linked. Both have elements of ‘user centred design’ and understanding how occupants use buildings.

Potential new areas of focus emerging from the survey

In addition to the ‘usual suspects’, there are three further areas which clearly are matters for concern in the industry, which the National Platform, TSB and MBE KTN could consider addressing (see table below).

Interestingly, ‘soft’ aspects of **demographic change** and **wellbeing** feature strongly in the survey – clearly the sharp changes in demand for housing and infrastructure to address demographic change are areas of concern for the industry, and may need to be addressed on two fronts:

- 1) research and communication into the scale of the future market need and
- 2) the technical requirements and industry actions required to address that need.

Industry factors are also a significant concern (see table below). These primarily speak of the **skills gaps**, **construction quality and efficiency**, and the need for an **integrated approach** to projects throughout their life cycle. These matters are already discussed in a variety of forums, but a concerted approach is not necessarily being taken to addressing them – there is an **opportunity for the National Platform** to corral and coordinate industry efforts to achieve greater traction overall. This could be done alongside the Green Construction Board’s work (for example the emerging Routemap for Low Carbon Construction).

<p>Wellbeing</p> <p>Design supporting productivity and wellbeing</p> <p>Buildings ensuring occupant wellbeing</p> <p>Lack of clarity over what constitutes value</p> <p>Holistic design</p>	<p>Demographic change:</p> <p>Increasing demand for housing</p> <p>Demand for infrastructure to support economic and social activity</p> <p>Needs of the elderly</p> <p>Urban places ensuring social cohesion</p>
<p>Industry factors</p> <p>Environmental cost of construction</p> <p>Need for stronger client leadership for improvements in construction</p> <p>Improve training and skills for construction workers</p> <p>Improve efficiency</p> <p>Need for innovative approaches to procurement</p> <p>Adversarial practices leading to lack of trust</p> <p>Inconsistent construction quality</p> <p>Integrated planning, design, construction and operation</p> <p>Tension between capital cost and value</p>	

Appendix: Detailed analysis of votes

Total number of votes cast: 2,284

Number of individual voters: approx 140

Highest no votes cast for a single driver: 63 for Resource efficient built environment

Note: half the votes were cast for the top 24 drivers, each scoring 39 votes or more each.

<http://vote.driversofchange.com/index.php?event=92>

Topics with over 30 votes:

Driver	Category	Votes
Resource efficient built environment	Global Economy	63
Close gap between predicted and actual performance of buildings	Climate Change Mitigation and Energy	59
Improve energy efficiency of buildings	Climate Change Mitigation and Energy	58
Whole-life carbon in design	Climate Change Mitigation and Energy	58
Buildings ensuring occupant wellbeing	Demographics	54
Environmental cost of construction	Global Economy	53
Need for resilience to climate change	Resilience and Hazards	52
Funding for transition to low-CO2 economy	Global Economy	51
Reducing emissions from existing building stock	Climate Change Mitigation and Energy	50
Lack of clear responsibility for energy efficiency	Climate Change Mitigation and Energy	46
Design supporting productivity and wellbeing	Wellbeing	46
Lack of clarity over what constitutes value	Wellbeing	45
Increasing demand for housing	Demographics	44
Integrated planning, design, construction and operation	Wellbeing	44
Extreme weather conditions	Climate Change Adaptation	43
Ageing infrastructure assets	Resilience and Hazards	42
Need for stronger client leadership for improvements in construction	Industry Factors	42
Improve training and skills for construction workers	Industry Factors	42
Tension between capital cost and value	Wellbeing	41
Design in flexibility	Resilience and Hazards	41
A more balanced and consistent approach to sustainable development.	Climate Change Adaptation	41
Provide secure supply of energy, water and transport	Resilience and Hazards	39
Demand for infrastructure to support economic and social activity	Demographics	39
Increased risk of overheating	Climate Change Adaptation	39
holistic design	Wellbeing	37
Shift from conventional energy generation to renewables	Climate Change Mitigation and Energy	37
Improve efficiency	Industry Factors	37
Need for unified approach to carbon accounting	Climate Change Mitigation and Energy	36
Need for innovative approaches to procurement	Industry Factors	36
Needs of the elderly	Demographics	35
Urban places ensuring social cohesion	Demographics	35
Adversarial practices leading to lack of trust	Industry Factors	34
Low demand for low-carbon new-build and retrofit	Climate Change Mitigation and Energy	30
Inconsistent construction quality	Industry Factors	30

Votes by category:

- Climate change mitigation: 523
- Industry factors: 414
- Global Economy: 328
- Demographics: 323
- Resilience and hazard: 254
- Climate change adaptation: 229
- Wellbeing: 213

So – all categories seen as important. Note that all wellbeing drivers scored 37 or above, but there were only 5 of them – so lower score does not mean less important.

Occurrence of Categories in highest rated drivers

Number of times each category appears in top 24 drivers, vs. total number of drivers listed in that category:

- Climate change mitigation: 5 /20 (25% of drivers appear)
- Climate change adaptation: 3 /10 (30%)
- Demographics: 3 /13 (23%)
- Global economy: 3 /18 (17%)
- Industry factors: 2 /25 (8%)
- Resilience and hazards: 4 /10 (40%)
- Wellbeing: 4 /5 (80%)

From this it can be seen that ‘wellbeing’ and ‘resilience and hazards’ seem to be very important, while global economy and industry factors are less important. While climate change adaptation has fewer ‘top scorers’ than climate change mitigation, when seen as a percentage of the number of drivers it seems to be equally important. (Note that these are qualitative judgements, but attempt to even out the disparity caused in total numbers of votes per category caused by the number of drivers in a category)

Voter breakdown:Experience:

0-4 years in industry: 33

5-9 years: 37

10-14 years: 23

15+ years: 69

Sector:

Architect: 16

Client: 6

Construction: 13 (11 large, 2 small)

Engineering consultancy: 27

Facilities management: 11

Public sector: 11

Other: 81