



Chartered property,
land and construction
surveyors

EMPLOYMENT, REMUNERATION AND WORKPLACE REPORT 2023

Dr Róisín Murphy

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FOREWORD

This report expands and builds on two previous reports from 2014 and 2018. It projects employment levels within the sector over the coming years in comparison with the numbers currently enrolled on third-level surveying programmes.

This latest report has been expanded significantly to include data on remuneration, work benefits and workplace strategy, providing key insights for employers and employees alike. The report also provides some information into gender pay and potential demand for apprenticeships in our industry.

The report, undertaken by Dr Róisín Murphy, is based on the participation of over 850 contributors across construction, property and land practices. Additionally, third-level education providers contributed to the determination of the future supply of surveying professionals over the time period in question.

A greater diversity of entrants will enhance our industry and help to ensure a steady flow of highly educated, highly trained professionals to help overcome the continued challenges created by the shortage of qualified surveyors.

Despite global and domestic economic uncertainty arising from energy costs, interest rates, supply shortages, and the ongoing conflict in Ukraine, the report identifies a continued strong demand for surveying professionals across all disciplines.

Student numbers on SCSi-accredited third-level programmes have increased significantly compared to previous reports; however, continued investment and innovation is required to ensure future demand is met.

Any shortage of suitably qualified graduates may restrict the capacity of the property, land and construction sectors at a vital stage in the delivery of key projects, such as the Climate Action Plan, Housing for All and the National Development Plan.

An attractive career

The strong demand for surveyors is borne out in figures relating to remuneration, with a very healthy median salary and range of benefits available to employees, making surveying an attractive career for prospective students. The surveying industry embraces disruption and innovation, and this report highlights that the profession has largely welcomed new ways of working, particularly hybrid working, allowing for greater flexibility in a highly competitive labour market.

Looking towards the future, the report identifies significant opportunities for surveyors for upskilling in a range of areas, most notably relating to sustainable development. The report also shows a strong interest in apprenticeships across all industry sectors, which has potential to open new pathways for entry to the profession. A greater diversity of entrants will enhance our industry and help to ensure a steady flow of highly educated, highly trained professionals to help overcome the continued challenges created by the shortage of qualified surveyors.

It is clear that the new generation of surveyors will be well placed to take advantage of growing domestic and international employment opportunities. It is imperative that we continue to encourage increased diversity and overall numbers of people into surveying professions.

Kevin James
SCSi President

EXECUTIVE SUMMARY

This report follows the previously published “Employment Opportunities and Future Skills Requirements for Surveying Professionals, 2018-2021” in which a significant shortage of property, land and construction professionals was projected. The current research has been undertaken against a backdrop of economic uncertainty due largely to Brexit, Covid-19 and the war in Ukraine.

The Irish economy rebounded well following the Covid-19 pandemic with low unemployment, moderate economic growth and solid Exchequer balances forecast in the medium term. On the downside, price inflation, fueled by soaring energy costs, has resulted in interest rates rising for the first time in over a decade which has a cascading impact on businesses and households.

The ongoing housing crisis in Ireland and the legally binding requirement to achieve net zero carbon emissions by 2050 remain urgent priority areas that must be addressed. To achieve the ambitions set out in the National Development Plan (NDP) 2021-2030, it is imperative to have a sufficiently skilled labour force across the built environment. The ongoing aggregation of surveying with other professions in the nationally available datasets remains a challenge in scrutinising surveying labour market trends, thereby providing the impetus for this research.

A key objective of the research is to project future demand for surveying professionals and to ascertain whether the future supply of qualified surveyors will adequately meet demand over the period 2023-2026. Data was requested from each SCSi member company through an online survey whereby estimates of future employment demand across every level of experience were provided based on three possible scenarios of economic growth as measured by Gross Domestic Product (GDP) namely 4% p.a, 3% p.a. and 2% p.a. A response rate of 26% was obtained for this phase of the research. Future supply was estimated using current enrolment on SCSi-accredited surveying programmes nationwide.

Based on the median scenario of GDP growth of 3% p.a. between 2023 and 2026, it is projected that a shortage of surveying professionals will occur. Estimates provided in the research are conservative as they do not consider additional opportunities arising through retirements or promotion; nor do they account for surveyors engaged in sectors outside of the built environment.

The shortage of surveyors may exert upward pressure on wages, and as part of the research the current remuneration and benefits of surveying professionals at every level were determined. Data for this component was gathered through an online survey administered to SCSi members from which a response rate of 27% was achieved. Findings confirm an average 10% increase in salary since the last Remuneration and Attitudes survey was undertaken by the SCSi in 2019. Remuneration includes salary and a range of additional non-pay benefits, including flexible workplaces, offered to surveying professionals.

A key objective of the research is to project future demand for surveying professionals and to ascertain whether the future supply of qualified surveyors will adequately meet demand over the period 2023-2026.

For the first time within the surveying profession, this research provides an investigation of the workplace strategy of property, land and construction professionals. Insight was gathered across the two surveys noted, to garner perspectives at organisational and individual levels. Workplace preferences, challenges and enablers are determined with a hybrid model in the place and time of work prevailing.

The report concludes with a suite of recommendations for property, land and construction stakeholders requiring data-driven, evidence-based actions relating to employment, education, training and workplace strategy. These four elements must work in sync to ensure the stability and sustainability of the surveying labour force of the future.

KEY FINDINGS

867

research participants

1,829

supply of additional professionals

2,162

additional demand (median scenario)

70%

confirm residential sector drives employment

57%

likely to employ an apprentice

82%

confirm inflation is a barrier to employment growth

€77,199

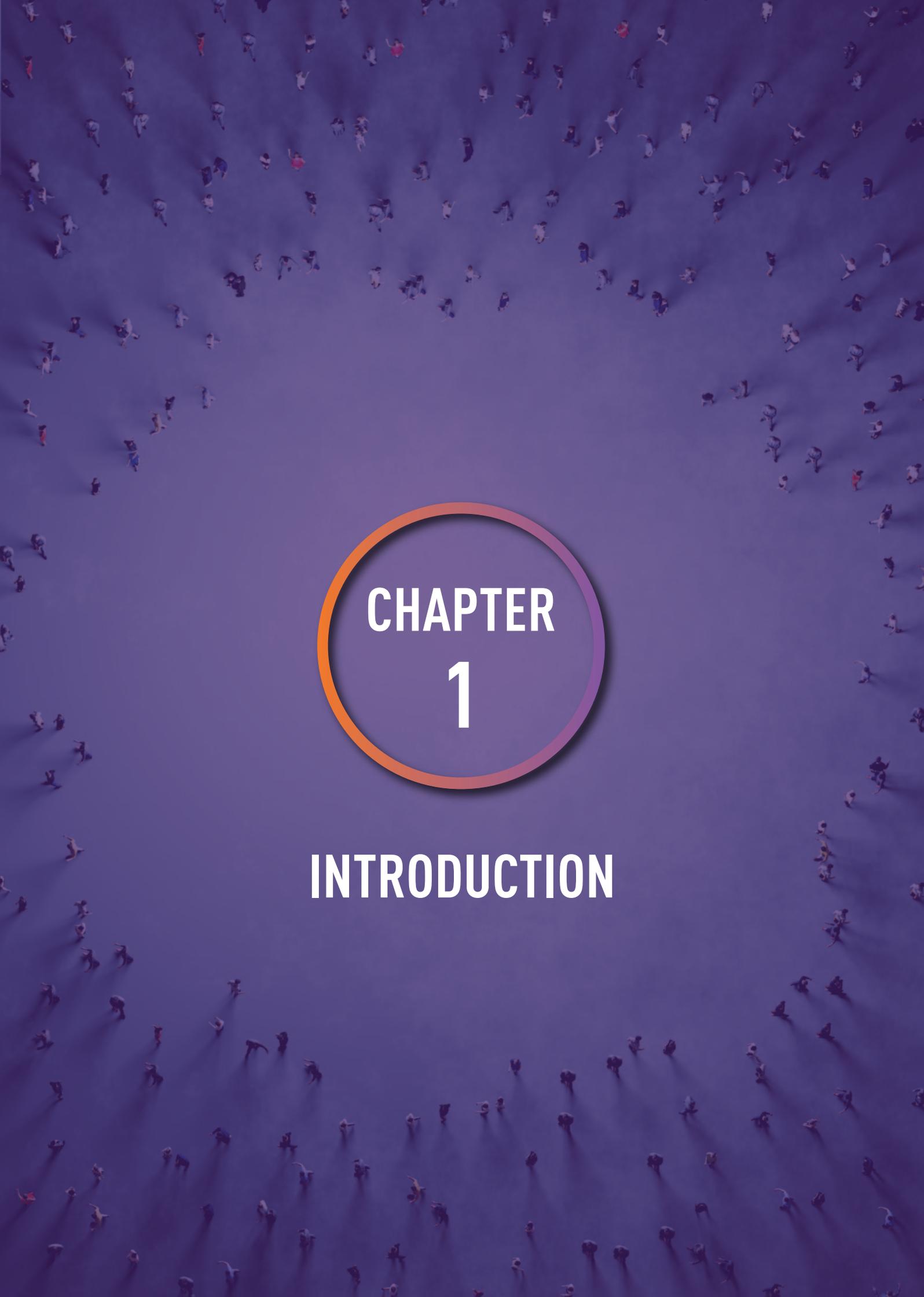
median salary (↑10%)

61%

of surveyors work on a hybrid basis

42%

would change employers based on workplace options



**CHAPTER
1**

INTRODUCTION



1. INTRODUCTION

1.1 Background and Economic Context

This report follows the “Employment Opportunities and Future Skills Requirements for Surveying Professionals 2018-2021” report in which a shortage of property, land and construction professionals was projected. Since the 2018 report, the domestic and international landscape has changed considerably due to a range of exogenous events including Brexit, Covid-19 and the war in Ukraine, combining to form a backdrop of uncertainty underpinning the current research.

Economic Growth

The Irish economy was the fastest growing economy in Europe between 2018 and 2021, with the World Bank confirming Irish Gross Domestic Product (GDP) growth as follows:

2018	9%
2019	4.9%
2020	5.9%
2021	13.5%

GDP per capita was 60% higher than the OECD’s best performers (OECD 2022), before the onset of the Covid-19 pandemic in early 2020. The devastation of the pandemic resulted in millions of people losing their lives worldwide, and also caused shockwaves through global economies. Thousands of businesses were forced to close for prolonged periods and unemployment in Ireland soared.

Since the reopening of society in 2022, the bounce-back was rapid, however, very shortly thereafter the Russian invasion of Ukraine caused international uncertainty and sizable inflationary pressure due to energy price rises; and supply chain challenges remain.

Economic growth in Ireland is forecast to be robust over the next number of years driven largely by Foreign Direct Investment (FDI) and export demand, albeit at a more moderate pace. The export-driven growth is a potential risk factor as unpredictability in international market conditions creates uncertainty, particularly if trading partners within the EU, UK and USA enter into a recession.

Domestic demand moderated towards the latter part of 2022. This is in part reflective of a return to more normal levels following a period of rapid growth post-Covid-19, but also consumption decisions becoming more cautious amid rising prices. Notwithstanding the headwinds currently facing the Irish economy, the European Commission forecasts Irish GDP growth in 2023 and 2024 as 3.2% and 3.1%, respectively.

Inflation

Inflationary pressure is negatively impacting sentiment, both business and consumer, and is reflected in the declines in the Consumer Sentiment Index, Real Estate Construction Purchasing Managers Index (PMI) in addition to the Retail Sales Index. Additionally, supply chain and energy price rises have

further driven commercial Construction Tender Prices to increase by 14% in 2022, according to the most recent [SCSI Tender Price Index](#).

The housing crisis in Ireland persists at a critical level with an acute undersupply continuing to exert upward pressure on prices whilst over 10,000 people remain homeless. Mortgage lending rules have been adjusted, however, this may further exert inflationary pressure if supply-side advancements are not made.

Rising inflation is not unique to the Irish economy; in fact the Euro area inflation is at historically high levels resulting in the European Central Bank (ECB) increasing interest rates from the prolonged lows up to 2022. Rising interest rates are likely to continue into 2023, which has a cascading impact filtering through to businesses and households.

Employment

On a positive note, the labour market in Ireland has rebounded strongly following a peak of 28% unemployment during the Covid-19 pandemic (including those on the Pandemic Unemployment Payment). At the time of writing the Irish economy is close to full employment with an unemployment rate of 4.4%.

Recent redundancy announcements within the tech sector are a cloud on the horizon for the labour market, largely resulting from over-hiring during the preceding two years. Whilst this may not pose a significant threat of contagion across other international firms operating in Ireland, it requires ongoing monitoring and early intervention if necessary.

The pandemic forced us to reconsider how and where we work and accelerated digital adoption to enable the pivot to remote working. Whilst many have returned to the (physical) office it is likely that a hybrid (blend of remote and in-person) work model will predominate going forward. This will augment labour participation as workplace flexibility enables a diverse range of people of all ages to remain in the workforce.

A higher labour market participation rate increases the resource capacity for the delivery of strategic public sector capital investment priorities, including addressing the housing and climate challenges.

Public Policy

As noted, the Irish economy rebounded well following the Covid-19 pandemic, particularly in the context of the labour market, but global uncertainties continue to pose challenges necessitating a national policy response.

From a public policy perspective, the complexity of balancing expenditure to households and businesses that require support with the potential repercussion of further increasing inflation remains a challenge. Public finances are reasonably healthy with strong income and corporate tax receipts; however, overreliance on comparatively few large organisations in the case of the latter leaves the Irish economy vulnerable to exogenous events. It is critically important that we mitigate the risk associated with overreliance on international firms and plan public finances accordingly.

The planned expenditure of €165bn under the National Development Plan (NDP) 2021-2030 to address ten National Strategic Objectives (NSOs) aims to deliver balanced economic, social and environmental development across the country. As part of the planned expenditure, 'Housing for All', the Government's housing policy, proposes several pathways for the provision of housing for our increasing population and to address the previously noted housing crisis.

It should be noted that progress has been sluggish and several milestones in the provision of additional and affordable houses have already been missed. The Climate Action Plan 2021 provides the framework by which we can reach our legally binding target of net-zero carbon emissions by 2050. Built environment professionals play a central role in the attainment of these targets.

A pivotal factor for the successful delivery of the policies and achievement of targets, is the availability of suitably skilled property, land and construction professionals. These professions are engaged at every stage in the delivery of our sustainable built environment. The continued aggregation of surveying with other professions in the nationally available data presents a challenge in monitoring trends and projecting future demand, thereby providing the rationale and basis for the current research.

1.2 Research Objectives

The purpose of this research, commissioned by the SCSI but undertaken on an independent basis, is to address the existing gap in knowledge in relation to labour market trends for property, land and construction professionals.

A demand and supply analysis of surveying professionals is warranted given the importance of the surveying profession within the built environment sector for the delivery of our national strategic objectives. The intention of the research is therefore to provide insight into the surveying labour market and identify drivers of trends therein.

In examining the surveying labour market a key component is the cost of labour, therefore the research extends to include an examination of remuneration (including non-pay benefits) at every level of experience within the profession.

The future of work is also incorporated within the analysis. Since the onset of Covid-19 much discussion has taken place regarding the future of work and in particular remote (working from home or hub) and hybrid (blend of remote and in-person) practices. To date, there is limited evidence pertaining to property, land and construction professions and this research seeks to bridge that gap.

The research, therefore, addresses several important objectives including:

- to project future demand for property, land and construction professionals;
- to calculate additional supply of property, land and construction professionals;
- to ascertain remuneration (salary and benefits) within the profession; and
- to identify current workplace strategy for property, land and construction professionals.

The following section outlines the research strategy employed to achieve the stated objectives.

1.3 Methodology

The multi-dimensional nature of the research necessitates input from a range of stakeholder groups including employers, employees, and Higher Education Institutes (HEIs), which was undertaken in three quantitative phases, supplemented by a small number of interviews.

1.3.1 Phase 1: Key informant survey

A key purpose of the first phase of research was to project future demand for surveying professionals at every level. A single senior member of every SCSl member practice was identified to participate in an online survey on behalf of their organisation. The rationale for targeting a single “key informant” from each member practice was twofold. Firstly, senior personnel are best placed to project organisational intent to recruit and possibly be involved in the recruitment process. Secondly involving only one person per company eliminated the potential for double counting. Key informants were asked to project future demand for additional surveying personnel based on three scenarios of economic growth over the period in question (2023-2026).

The most commonly understood measure of economic growth is GDP and despite the distorting impact of FDI on this indicator, it remains the most widely used method for measuring economic performance both in Ireland and internationally. The three scenarios of economic growth were based on Central Bank, ESRI and OECD forecasts at the time, as presented in **Figure 1**.

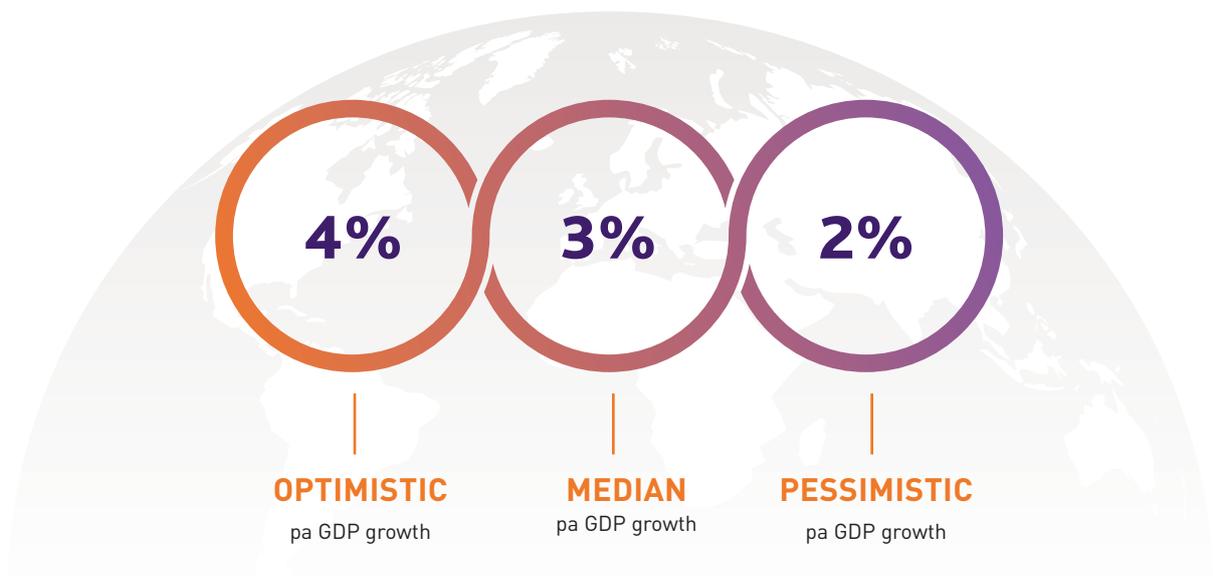


Figure 1: Economic growth scenarios.

The prevailing uncertain market conditions present a challenge in forecasting future economic growth, however as noted in a previous section, leading economic analysts predict GDP growth of approximately 3% per annum, at least for the next two years.

For the purposes of the research, the lowest scenario of annual economic growth is deemed pessimistic and the median scenario is the most closely aligned with national and international forecasts for Ireland. The optimistic and pessimistic scenarios therefore frame the analysis to account for variance from the median.

The second component of the key informant survey addressed the issue of workplace strategy, whereby respondents were asked to provide insight pertaining to their organisational practices in this regard. Furthermore, factors

influencing the organisational strategy and priorities for the long-term strategy were also determined through the online survey, which was subsequently compared to perspectives from the wider SCSi membership (see 1.3.2).

There are three main designations within the surveying profession, namely property, land and construction, with varying career pathways contained within each as presented in **Figure 2**.

Table 1 provides an overview of the response rate relating to the key informant phase of data collection across the three main surveying designations, incorporating all designations therein.

As is evident from **Table 1** an overall response rate of 26.2% was obtained, ranging from 19% for property and 82% for land surveyors (albeit from a considerably smaller population in the latter).



Figure 2: SCSi Surveying Designations.

Key informant survey	Number of target participants	Number of usable responses	Response rate	Multiplier applied
Construction	401*	109	27%	
Building Surveying	76	18	24%	4.2
Quantity Surveying	320	91	28%	3.6
Land	45	37	82%	1.2
Property	421	82	19%	5.3
TOTAL	867	228	26.2%	

*Includes 5 Project Management Surveyors.

Table 1: Key informant response rate.

To project future demand across the full membership, a multiplier, based on the associated response rate, was determined to gross up the sample results to represent the total population of member practices. The multiplier used necessarily differed for each designation and is also presented in **Table 1**. It is acknowledged that property, land and construction professionals are engaged across a wide range of economic sectors, including banking, finance, management consultancy and the public sector, however, this research is limited to projecting future demand solely within SCSi member practices. Consequently, estimates of future demand are deemed conservative.

The two largest construction surveying pathways are Building Surveying and Quantity Surveying (QS) which are differentiated throughout the analysis given their varied role within the construction sector, but also the notable difference in the number of SCSi member practices within each pathway. This therefore impacts the overall response rate and multiplier to be used to determine future demand. Furthermore, the comparatively lower number of Building Surveying respondents statistically gives a +/- 20% margin of error at a confidence level of 95%; whereas for QS the margin is +/- 9%. Put simply, this means we can be 95% confident that the responses obtained are within +/- 20% for Building Surveying and +/- 9% for QS.

Other construction surveying pathways (e.g. Project Management) are growing in importance however only five key informants were identified of which two responded. Consequently, to project future demand, only Building Surveying and QS were included in the research. Across property and land surveying designations the variance is less pronounced therefore results are presented in aggregate. Caution must be expressed in the application of a multiplier of 5.3 in the case of the property designation given the potential for distortion effects of a lower response rate. However statistically, the results give a +/- 10% margin of error at a 95% confidence level for property surveying. The response rate for land surveying results in a near-zero margin of error.

The demand projections represent additional demand at various levels and do not take into consideration the replacement of retirees. The estimates presented within this research are consequently regarded as conservative. Several semi-structured interviews were also undertaken with key informants to garner further depth of insight into the research findings. Interviews were conducted on a one-to-one basis with a variety of property, land and construction professionals representing a range of surveying designations. Where direct quotes from interview respondents are included in the analysis, permission was granted by the respondent to identify them in the report.

1.3.2 Phase 2: SCSi member survey

The second phase of the research involved the wider SCSi membership to collect a range of information concerning employment, remuneration and workplace practices. The remuneration and benefits of surveying professionals were last determined in 2019, and as noted previously, employment trends and workplaces have changed considerably in the intervening period. Following the enforced remote working practices due to the Covid-19 pandemic, workers are now returning to the office, albeit to varying degrees depending on a range of factors. Whilst many industry reports have been published about workplace practices and the future of work, there remains limited empirical evidence pertaining to the surveying profession specifically.

The SCSi members were asked to participate in a separate online survey that addressed the following:

- type of employment and duration with the current employer;
- current salary;
- additional benefits received;
- current workplace practices;
- preferred workplace practices.

Table 2 details the total number of member participants and usable responses for the member survey resulting in a 27% response rate

Member survey	Number of target participants	Number of usable responses	Response rate
Property	1,237	279	23%
Land	51	25	49%
Construction	1,066	335	31%
TOTAL	2,354	639	27%

Table 2: Member survey response rate.

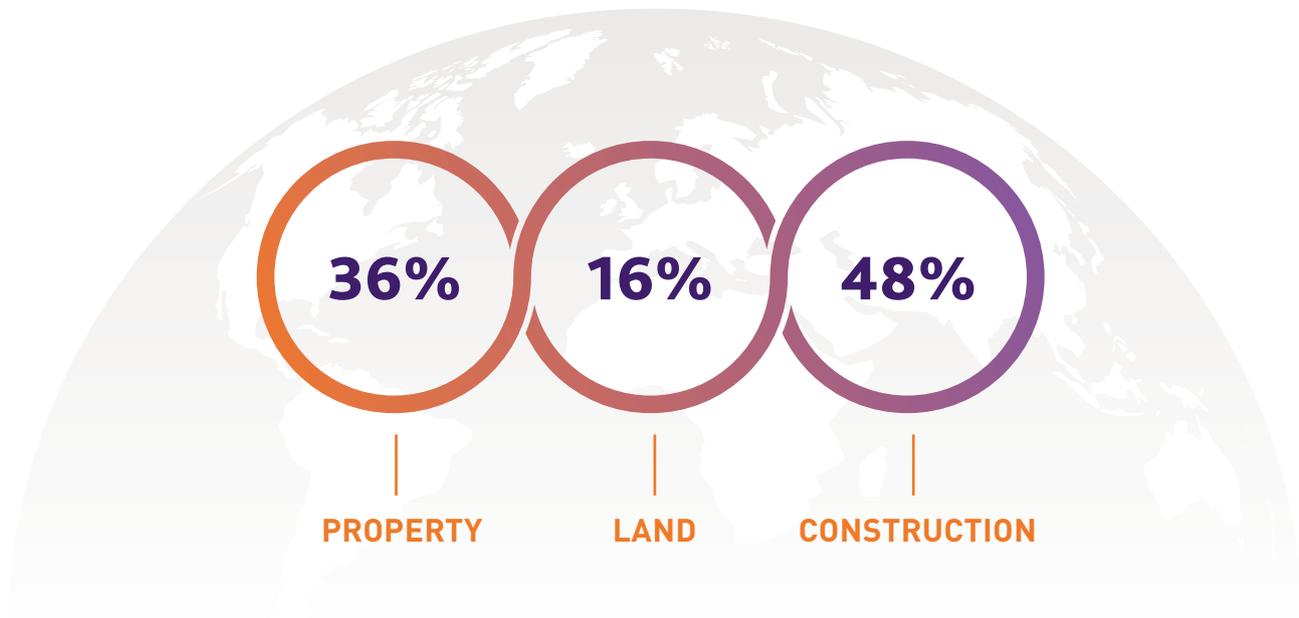


Figure 3: Key informant surveying designation.

overall. It should be noted that the participants in this phase of research exclude the key informants from phase one of the research and also exclude academic and student members.

In total, 28 surveying programmes are delivered in Ireland, 24 of which are accredited by the SCSi across 11 campuses nationwide.

The response rate from the member survey is deemed representative of the membership as a whole, and with a population size of 2,354 and a sample size of 639, the margin of error is +/- 3.5% at a 95% confidence level. This low margin of error indicates that the data obtained can be considered as having a high level of reliability.

Unlike the key informant data, results from the member survey are presented across property, land and construction designations overall rather than specific pathways within, however where notable divergences within pathways exist they are highlighted as they arise within the analysis on an exceptional basis.

A range of quotations provided by respondents to the survey are included in the analysis. The survey responses were anonymous, however, the designation of the respondent is identified in the quotations presented within the research where possible.

1.3.3 Phase 3: SCSi-accredited programme enrolment

To project the future supply of property, land and construction professionals, current enrolment data on SCSi-accredited third-level programmes was collated from Higher Education Institutions (HEIs) nationwide.

This information is used to estimate additional supply of surveying professionals across property, land and construction over the period in question.

In total, 28 surveying programmes are delivered in Ireland, 24 of which are accredited by the SCSi across 11 campuses nationwide.

As noted previously, the limited response from key informants from some construction designations, including project management surveyors, prohibits meaningful analysis in relation to future demand. Thus, the number of learners currently enrolled in accredited project management degree programmes are not included to forecast associated future supply.

In addition, there is a range of programmes that provide a route to obtaining a Property Services Regulatory Authority (PSRA) licence that are not accredited by the SCSi. Whilst those undertaking the programmes will add to the supply of property professionals, it is not possible to accurately determine the number of potential new entrants through other routes, therefore they remain outside the scope of this research.

1.4 Respondent Profile

The profile of respondents, be they key informants or other SCSi members, provides the backdrop and context for analysis contained within the report. The following sections provide an overview of respondent profiles from both phases of quantitative data collection.

1.4.1 Key Informant Respondent Profile

As noted in the previous section a single key informant was identified within each SCSi member practice with an overall response rate of 26.2% obtained. The key informant was responding on behalf of their practice, and the categorisation of participants reflects the overall SCSi membership with a larger proportion of construction to property surveyors, and significantly fewer land surveyors.

The profile of respondents, be they key informants or other SCSi members, provides the backdrop and context for analysis contained within the report.

The positions held by key informants are presented in **Figure 4**, which

- Sole Practitioner
- CEO / Director / Partner
- Associate Director
- Department Manager
- Other

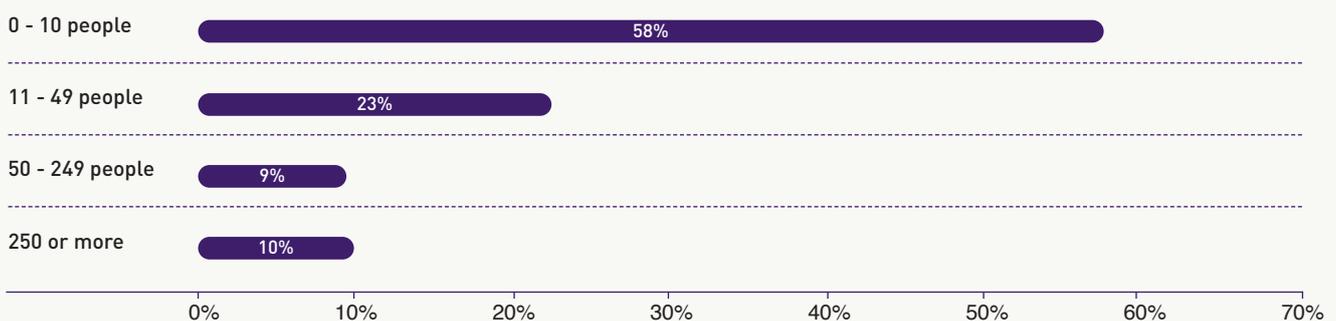


Figure 4: Key informant position in organisation.

demonstrates the seniority of respondents, and notably the significant proportion of sole practitioner informants. This is critically important given the large number of small and micro firms operating across the built environment and the ongoing information gaps in nationally available statistics in respect of these professions.

Whilst **Figure 4** confirms the position of the key informant, **Figure 5** verifies the size of practice from which key informants are positioned. As is evident from **Figure 5**, a large proportion of member practices employ ten or fewer people with a considerably smaller proportion employing more than 50 people.

FIGURE 5: NUMBER OF PEOPLE EMPLOYED IN KEY INFORMANT ORGANISATION.



Geographically, 57% of these companies are based in Dublin, with 10% based in the South-West (Cork and Kerry) and fewer than 8% in each of the remaining regions nationwide.

1.4.2 Member Respondent Profile

In respect of the SCSi member survey, all pathways across the three main designations were included with an overall response rate of 27% which varied across designations (see section 1.3.2). The overall category of member respondent designation is presented in **Figure 6**.

The largest proportion of respondents were construction surveyors followed by property surveyors. Land surveying comprises 4% of the responses received, therefore, while it is representative of SCSi membership, caution must be expressed in the interpretation of the dataset from such a small sample size. Responses were received from members across varying levels within their organisation, representing the full range of experience of participants.

Figure 7 demonstrates that respondents comprised every level in the organisation, with the smallest proportion being junior surveyors. A range

- Director or Partner
- Associate Director
- Department Manager
- Senior Surveyor
- Surveyor
- Junior Surveyor
- Other

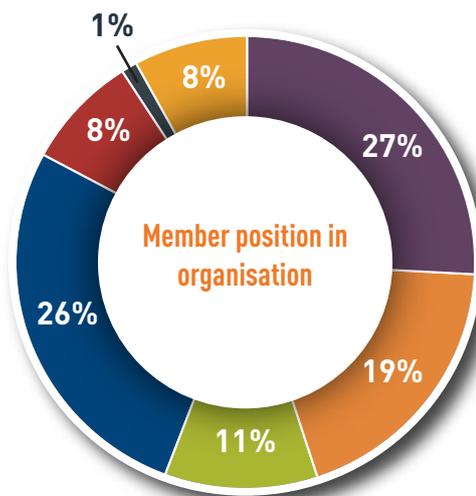


Figure 7: Member position in organisation.

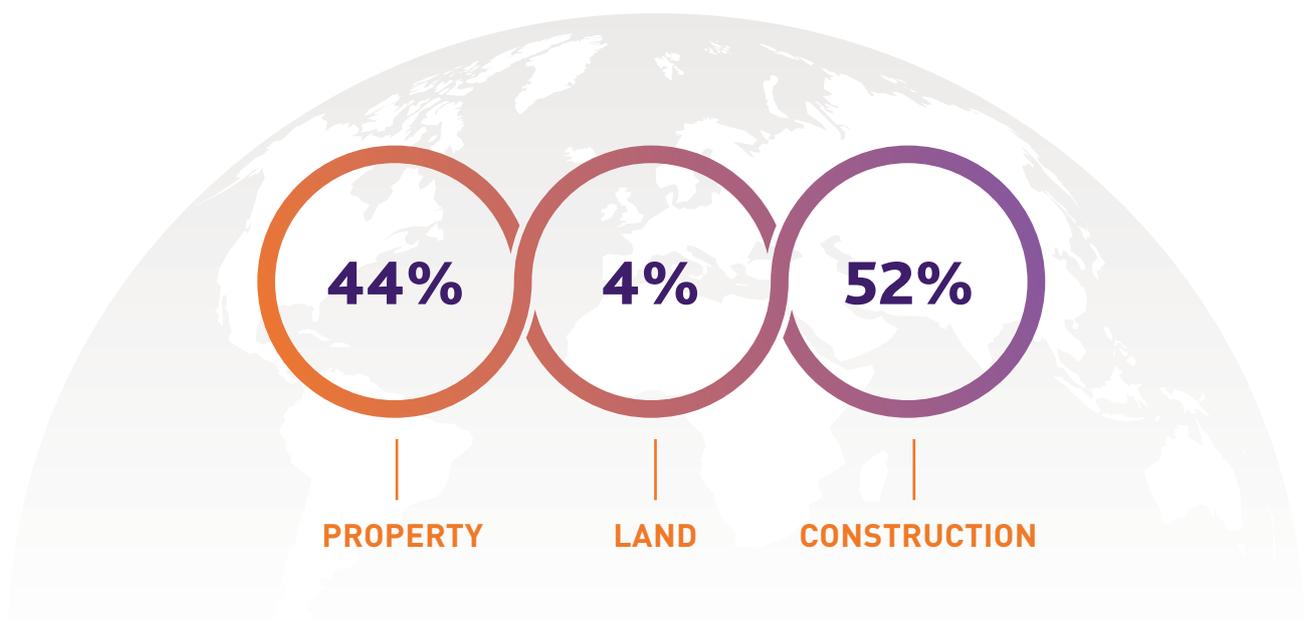


Figure 6: Member surveying designation.

of positions were held by those that selected the “other” category ranging from public sector grades not represented in the options provided, consultant, senior advisor, finance manager and asset manager for example.

Member designation of respondents is representative of the SCSi as a whole, with a proportionally greater number of construction surveyors to property surveyors, and a low number of land surveyors.

Geographically 67% of respondents are based in Dublin, 10% in the South-West (Cork/Kerry) and fewer than 10% of respondents are in each of the other regions nationally.

Geographically 67% of respondents are based in Dublin, 10% in the South-West (Cork/Kerry) and fewer than 10% of respondents are in each of the other regions nationally.

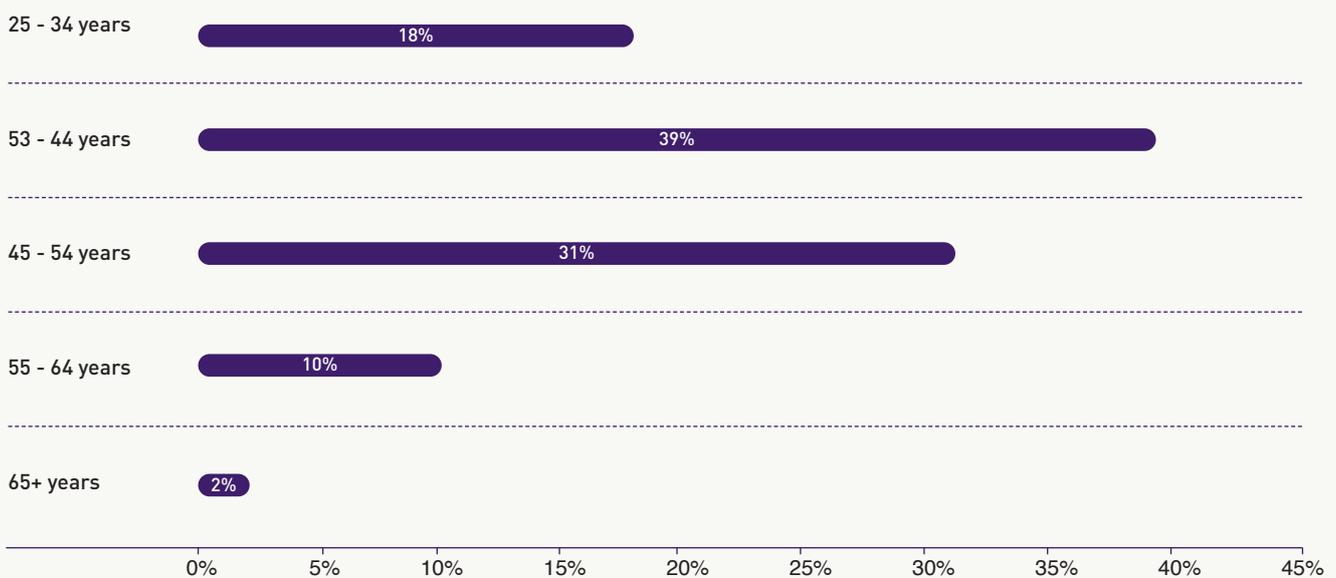
The age profile is outlined in **Figure 8**, of which 25% are female and 75% male. With 70% of respondents aged between 35 and 54 years of age, a good range and breadth of experience are reflected in responses.

The survey was not administered to students nor associate members, thereby explaining the lack of response from those under 25 years of age.

Respondents to the research were primarily employed on a full-time basis (95%) in companies of varying sizes.

A slightly larger proportion of those working part-time are female (53%) compared to the overall population of respondents (25% of

FIGURE 8: MEMBER AGE CATEGORY.



the sample are female), however, this is based on a small number of respondents that are working on a part-time basis (3%).

Furthermore, respondents have been employed within their current position for varying lengths of time, as outlined in **Figure 10**.

Respondents to the research were primarily employed on a full-time basis (95%) in companies of varying sizes.

FIGURE 9: MEMBER RESPONDENT COMPANY SIZE.

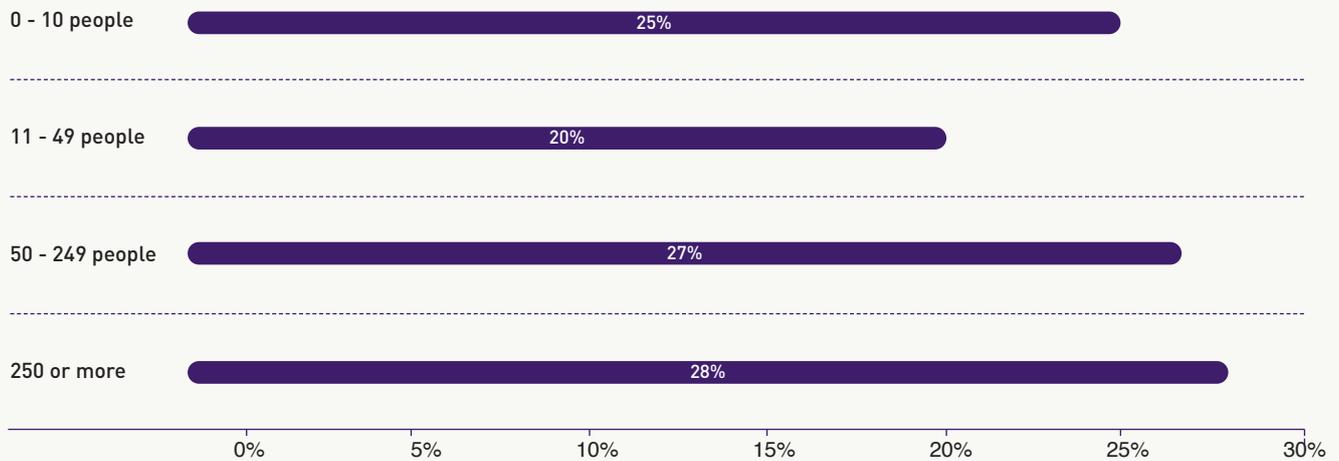
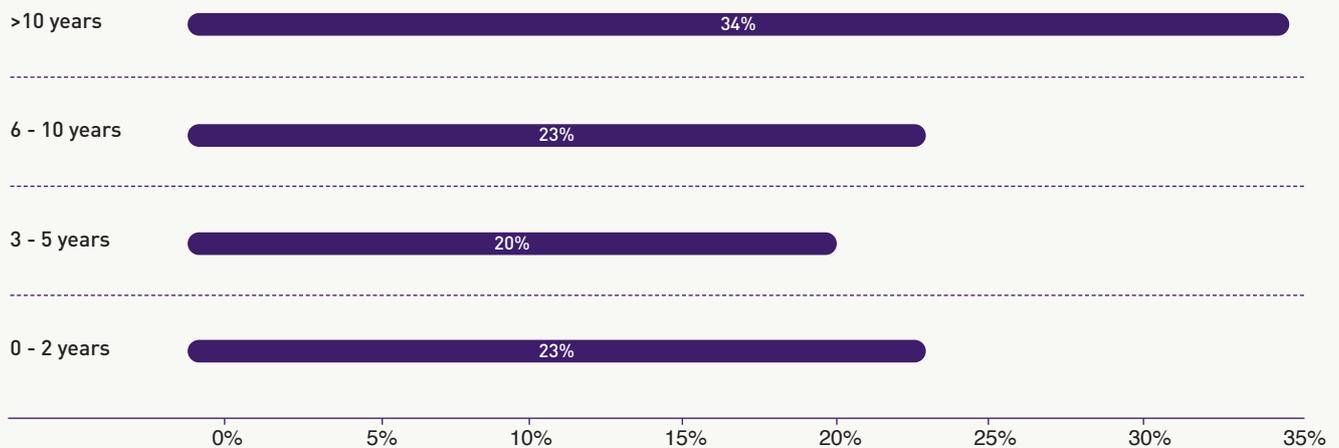


FIGURE 10: MEMBER LENGTH OF TIME AT CURRENT EMPLOYMENT.



1.5 Structure of Report

CHAPTER 1: INTRODUCTION

This chapter provides the context, scope and purpose of the report before the determination of research objectives.

An overview of the research strategy applied is presented. Response rates and respondent profiles are provided as applicable.

CHAPTER 2: FUTURE DEMAND AND SUPPLY

The second chapter provides a projection of additional future demand for property, land and construction professionals based on three scenarios of economic growth presented to a single key informant from every SCSi member practice.

The additional supply of surveying professionals is estimated based on current enrolment across all SCSi-accredited surveying programmes nationwide. This data is compared to the projected demand to ascertain the extent to which there is likely to be sufficient supply to meet demand.

CHAPTER 3: REMUNERATION AND EMPLOYMENT BENEFITS

Chapter 3 provides an analysis of the current salary and other employment benefits for surveying professionals nationwide based on a survey of SCSi members nationwide.

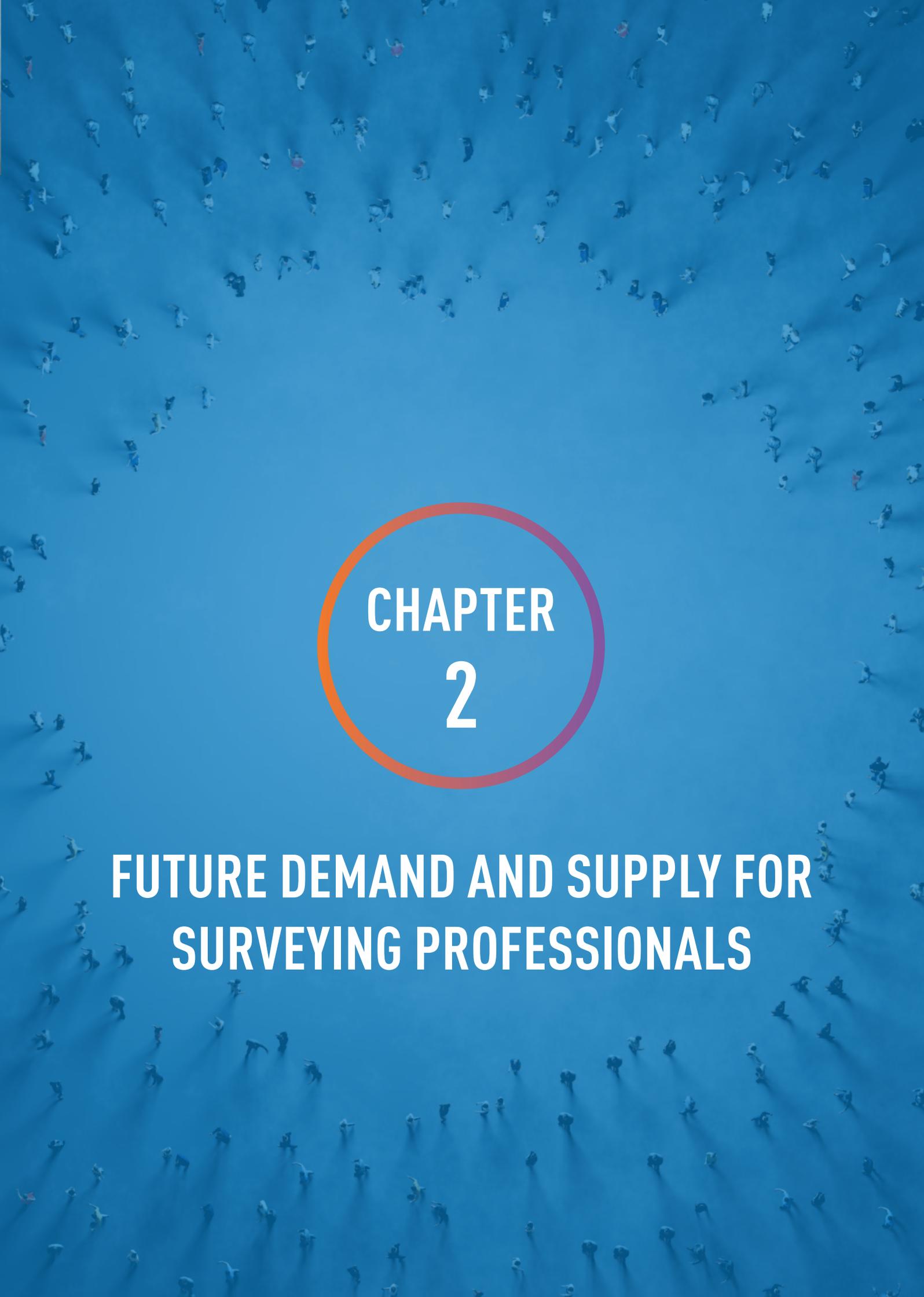
A comparative analysis of salaries against the previous SCSi Remuneration and Attitudes Survey 2019, is undertaken.

CHAPTER 4: WORKPLACE STRATEGY

An examination of the workplace strategy of SCSi member firms is undertaken to ascertain the extent of remote and hybrid work. For the first time, an assessment of the current and preferred workplace of surveying professionals is reported.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

The final chapter draws conclusions based on the preceding analysis and makes a suite of recommendations to address the issues raised.

An aerial, top-down view of a large crowd of people, appearing as small, dark silhouettes against a light blue background. The people are scattered across the entire frame, creating a sense of a large gathering or event. The overall color palette is a gradient of blues, from light to dark.

CHAPTER 2

FUTURE DEMAND AND SUPPLY FOR SURVEYING PROFESSIONALS



2. FUTURE DEMAND AND SUPPLY FOR SURVEYING PROFESSIONALS

2.1 Introduction

The previous “Employment Opportunities and Future Skills Requirements for Surveying Professionals” research projected a shortage of surveying professionals over the period (2018-2021) based on three scenarios of economic growth. For the first number of years covered by the report the Irish economy grew by more than the optimistic scenario of 4% p.a., however, Brexit was closely followed by the Covid-19 pandemic during the first quarter of 2020 which had a negative impact on economic growth.

The Covid-19 pandemic had devastating effects globally in terms of lives lost, and impacted the labour market as a consequence of restrictions and lockdowns. Unemployment in Ireland rocketed to 28% during the pandemic, but has returned to near-full employment levels with the re-opening of the economy early in 2022. Whilst workers have largely returned to the office following the pivot to remote working, new norms are being established as to how and where workers will work on a longer-term basis (addressed in chapter 4).

Global uncertainty arising from the ongoing war in Ukraine coupled with energy price increases have dampened economic growth

forecasts in Ireland. Furthermore, recent redundancy announcements within the tech sector are a cause for concern given Ireland’s reliance on Foreign Direct Investment (FDI), however, this may be explained by over-recruitment in the preceding two years.

The Irish economy is undergoing a period of uncertainty with high inflation, interest rate rises and turbulent international market conditions severely impacting energy prices. Despite challenging circumstances, there remain grounds for optimism and the economy is likely to grow in the medium term.

Better than anticipated Exchequer returns and planned expenditure under the NDP will undoubtedly bring opportunities across the built environment sector. Surveying professionals play a leading role in the provision of much-needed housing, infrastructure and the attainment of legally binding climate-related targets, consequently, it is imperative there are sufficient quantities of qualified surveyors to meet future demand.

Predicting future demand in the context of economic uncertainty is compounded by the limitation in nationally available data for

surveying professions. The SCSi is the largest professional body for surveyors in Ireland; therefore, compiling projected employment growth data directly from member firms advances insight considerably.

The purpose of this chapter is to project future demand and supply of property, land and construction professionals and determine whether additional supply qualifying through SCSi-accredited third-level programmes will likely meet this demand.

This chapter presents perspectives from two key stakeholder groups, namely:

- 1. SCSi practice key informants:** to estimate additional demand for surveying professionals at every level within the SCSi member practice; and
- 2. Higher Education Institutions (HEIs):** offering SCSi-accredited surveying programmes to estimate the total number of graduates within the timeframe under scrutiny (2023-2026)

Whilst survey data forms the basis of demand projections, deeper insight is garnered through qualitative data collected through semi-structured interviews.

This chapter commences with the determination of future demand for surveying professionals, following which the estimate of the additional supply of qualified surveyors is presented. Projected future demand and supply are then compared to reveal the extent to which the latter can meet the former.

2.2 Future Demand for Surveying Professionals

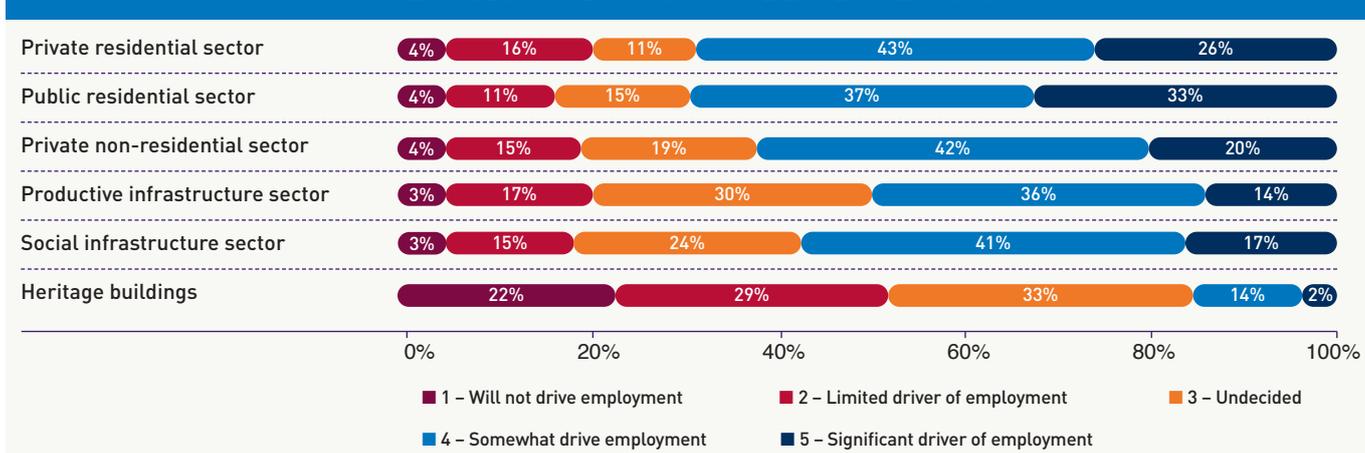
This section provides an analysis of the future demand for property, land and construction professionals over the period 2023-2026. Data was collected through the online key informant survey whereby a single senior person within each SCSi member practice was asked to answer on behalf of the organisation. Involving only one person per practice avoided the risk of double counting, and the senior position held by each informant ensured that the perspectives of decision-makers were incorporated.

The online survey comprised several general questions concerning the sectors likely to drive future employment, which are presented in **Figure 11**.

Survey data indicates that all of the main sectors will grow. No notable divergence across the surveying professions is evident in relation to sectoral drivers of demand.

Survey data indicates that growth will take place across all of the main sectors. No notable divergence across the surveying professions is evident in relation to sectoral drivers of demand, which is demonstrative of the varying roles of surveyors throughout the whole life of the asset including construction, valuation, sales, letting, management and maintenance.

FIGURE 11: SECTORS DRIVING FUTURE EMPLOYMENT GROWTH.



The residential sectors (public and private) arise as marginally more prominent in driving employment growth. This is explained not only by the urgent need to deliver new housing units but also the retrofit of existing stock for improved energy performance. Whilst national targets for new house building have yet to be reached on an annual basis, demand for housing is considered a key driver of employment growth for the surveying profession.

The non-residential sectors, including retail, industrial and offices are also deemed to be significant drivers of employment growth with public sector expenditure through the NDP driving growth for productive infrastructure (rail, road, airports etc.) and social infrastructure (hospitals, schools etc.).

Activity related to heritage buildings is not anticipated to drive employment growth to the same extent as other sectors, with over 50% of respondents confirming that it will not drive or that it is a limited driver of employment demand. The often specialised nature of activity within this sector is a plausible explanation for this finding.

The challenging economic environment has been outlined, and survey respondents were asked to rank the key barriers to and enablers of employment growth. The barriers and enablers identified are broadly similar across surveying designations, with an insignificant margin of divergence observed. The top three in each case as identified by key informants are presented in **Figure 12**.

Inflation (both consumer and construction price) are the key barriers to employment growth. The rapid rise in prices exacerbated by the cost of energy was met by interest rate increases by the ECB to curb spiraling inflation. Concurrent high inflation with muted economic growth leads to stagflation which in turn may lead to a more cautious approach to investment, thereby impacting the built environment sector.

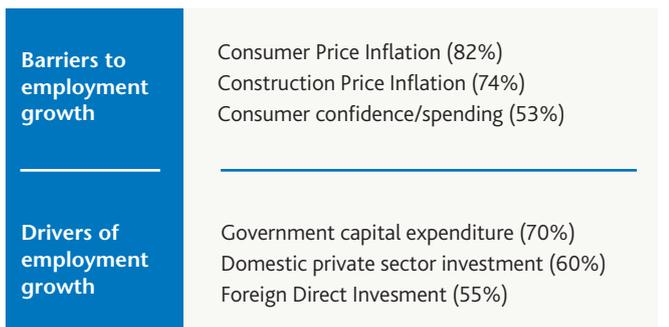


Figure 12: Barriers to and enablers of employment growth.

Public capital expenditure is identified as the leading driver of employment growth across the sector, with 70% of respondents confirming this to be the case. The Government has planned capital expenditure of €165bn over the life of the NDP which is dependent upon Exchequer balances.

Although Exchequer returns were higher than originally forecast for Budget 2023, ongoing monitoring and prioritisation of key projects, particularly housing, is critically important.

Domestic private sector investment demand is also considered a leading driver of employment growth, followed closely by FDI.

The higher ranking of domestic demand is a positive finding given the potential risks associated with over-dependence on FDI in Ireland, however, a word of caution was provided by one respondent who noted:

“Consumer confidence and spending could work either way in either direction. It’s difficult to call over the period stated. If you asked me the same question in 2006/2007 my answer would have been relatively optimistic, but 2008 brought an entirely different scenario.” Anon.

Any economic indicator could potentially change rapidly depending on market forces and unforeseen events. An example is the very short timeframe of exceptionally high unemployment through Covid-19, to the near-natural rate of unemployment in less than one year.

Public capital expenditure is identified as the leading driver of employment growth across the sector with 70% of respondents confirming this to be the case.

The built environment sector is cyclical in nature and exposed to market fluctuations, but cyclicity has always been a feature of the sector which has built a degree of resilience over time. This further validates the necessity to solicit insight into future demand from a

senior member of each SCSi member practice, as they are most likely to have experience through various stages of the economic cycle.

Key informants were asked if their company was currently experiencing staff shortages at various levels within their organisation.

Figure 13 presents survey responses identifying the extent to which shortages exist, and the level at which staff shortages may occur within their company. The most significant level at which shortages are identified is junior and senior surveyor, with few respondents noting a shortage at higher levels within their company.

In some cases, staff shortages did not apply to a company due to company size (e.g. sole trader) or the company did not employ people at a particular level, hence not applicable.

On closer examination of the data, for junior surveyors, a shortage is noted by a higher proportion of construction surveyors (50%) and a proportionately lower proportion of property surveyors (32%).

This divergence is similar in relation to senior surveyors (post APC), where a shortage is noted for 47% of construction but only 29% of property respondents, with an 18% difference at both levels.

To project future demand for surveyors, key informant respondents were asked to estimate the number of additional staff that would be employed at each level based on possible scenarios of economic

growth. As noted previously the additional demand did not include the replacement of retirees, therefore the projections are likely to be conservative.

The scenarios were determined using prevailing forecasts for GDP growth by leading institutions such as the Central Bank of Ireland, ESRI and OECD. The scenarios presented to respondents were:

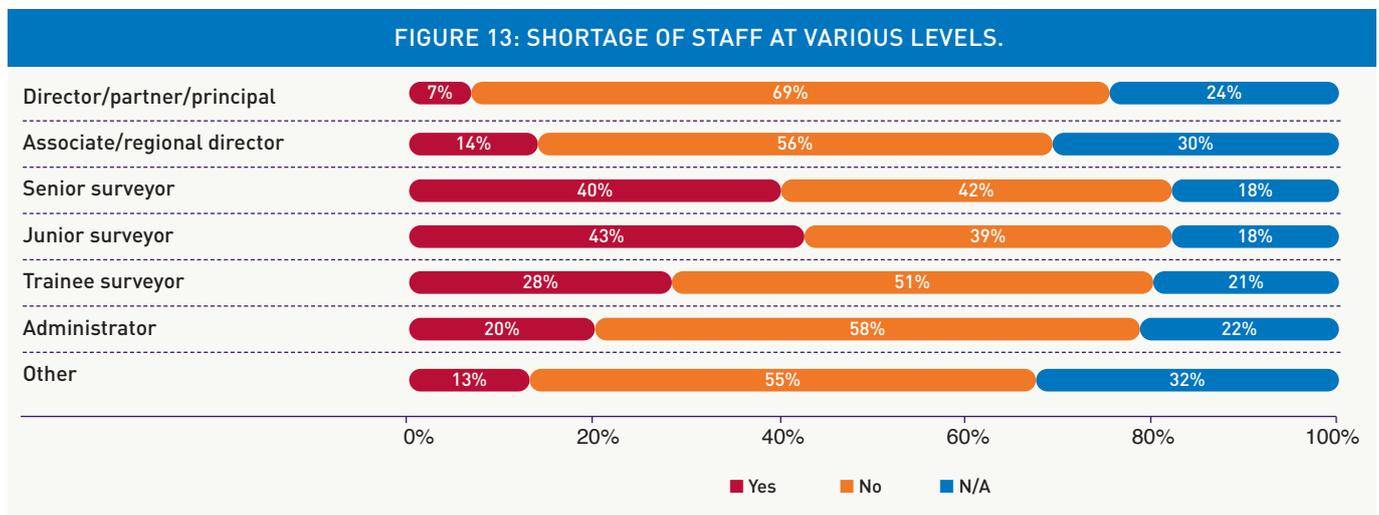
Optimistic scenario:	4% per annum growth
Median scenario:	3% per annum growth
Pessimistic scenario:	2% per annum growth

The median scenario is closely aligned with prevailing forecasts, and for the purposes of this research a lower annual growth rate is deemed to be a pessimistic scenario.

Whilst the three scenarios represent optimistic, median and pessimistic growth it is not possible to definitively determine which scenario is most likely to occur. This is entirely subject to market conditions over the period in question, 2023-2026, however the analysis to follow provides a projection of future demand under the scenarios.

As a consequence of differing response rates to the research across property, land and construction surveying designations, differing multipliers are applied to gross up the data obtained. The projected additional demand for surveying professionals across each designation is thus individually examined in the following sections.

FIGURE 13: SHORTAGE OF STAFF AT VARIOUS LEVELS.



2.2.1 Demand for Property Surveyors

Property surveying comprises several specialist pathways, including:

- Arts and antiques
- Commercial
- Facilities management
- Housing management and development
- Machinery and business assets
- Management consultancy
- Property finance and investment
- Property management
- Residential property practice
- Valuation

Respondents to the research covered the range of pathways listed, with the majority being residential, commercial or valuation surveyors.

Property surveying respondents were mostly located within the Dublin region (48%), and the majority of all Property surveying participants worked within small organisations (63% in companies of between 1 and 10 people).

A response rate of 19% was obtained overall within the property designation.

Consequently, a multiplier of 5.3 was applied to gross the data collected up to correspond with the overall population to project total additional employment at each level.

The overall level of employment growth over the period in question (2023-2026) for Property Surveying is presented in **Figure 14**.

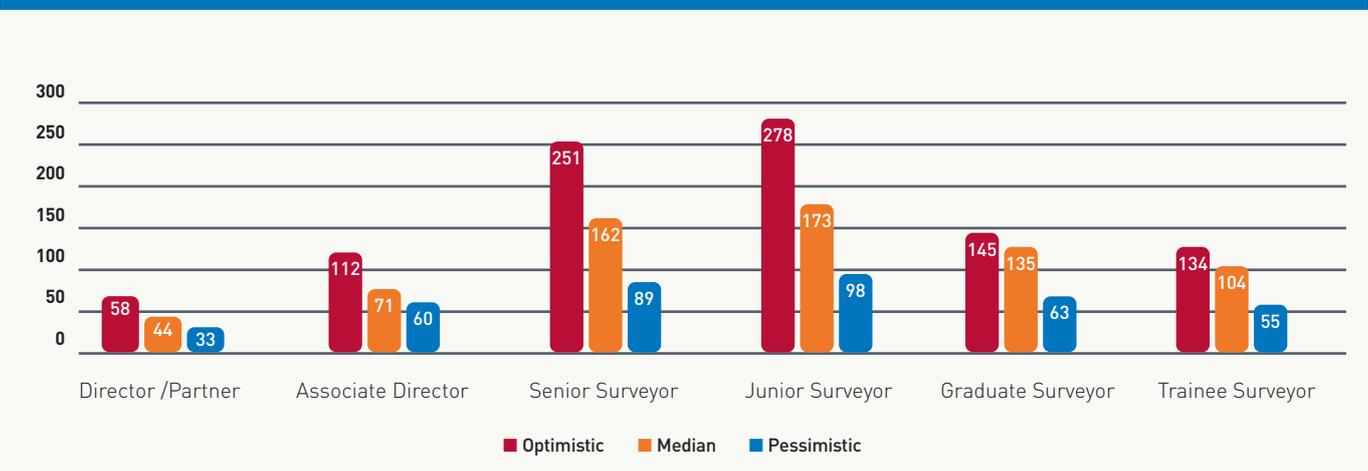
From **Figure 14** it is evident that the in-demand categories for Property Surveying are junior, senior and graduate surveyors. This is broadly in line with the levels where shortages were confirmed in the previous section.

The demand at Director and Associate Director levels is substantially below more junior levels, which is to be expected, however, these positions are likely to be filled internally thereby creating promotional opportunities for the levels beneath.

There is a sizeable gap between the optimistic and pessimistic scenario in terms of future additional demand for Property Surveyors demonstrating the sensitivity of the labour market to fluctuations in economic growth.

It is evident that the in-demand categories for Property Surveying are junior, senior and graduate surveyors. This is broadly in line with the levels where shortages were confirmed.

FIGURE 14: DEMAND FOR ADDITIONAL PROPERTY SURVEYORS 2023-2026.



2.2.2 Demand for Land Surveyors

The Land Surveying designation comprises a variety of pathways, including:

- Environmental
- Geomatics
- Minerals and waste management
- Planning and development
- Rural

Responses were received across all pathways, with a larger proportion of Geomatics Surveyors than others. Over half (51%) of companies represented are based in Dublin with 58% employing fewer than 10 people.

Although there are fewer land surveying professionals than in other designations, responses were received from across the pathways noted. A response rate of 82% of key informants was obtained for the research, therefore the multiplier applied in this case to gross the data to the overall population is 1.2. Using the same optimistic, median and pessimistic scenarios of economic growth, the future projected total demand for Land Surveying professionals is presented in **Figure 15**.

For Land Surveying, additional demand is largest for graduates followed by junior and senior surveyors. As positions at more senior levels are filled, particularly through internal promotion, additional opportunities will arise at lower levels. The number of Director and Associate Directors likely to be required is low, however, this may be explained by the small population size within the land surveying designation.

For Land Surveying, additional demand is largest for graduates followed by junior and senior surveyors. As positions at more senior levels are filled, particularly through internal promotion, additional opportunities will arise at lower levels.

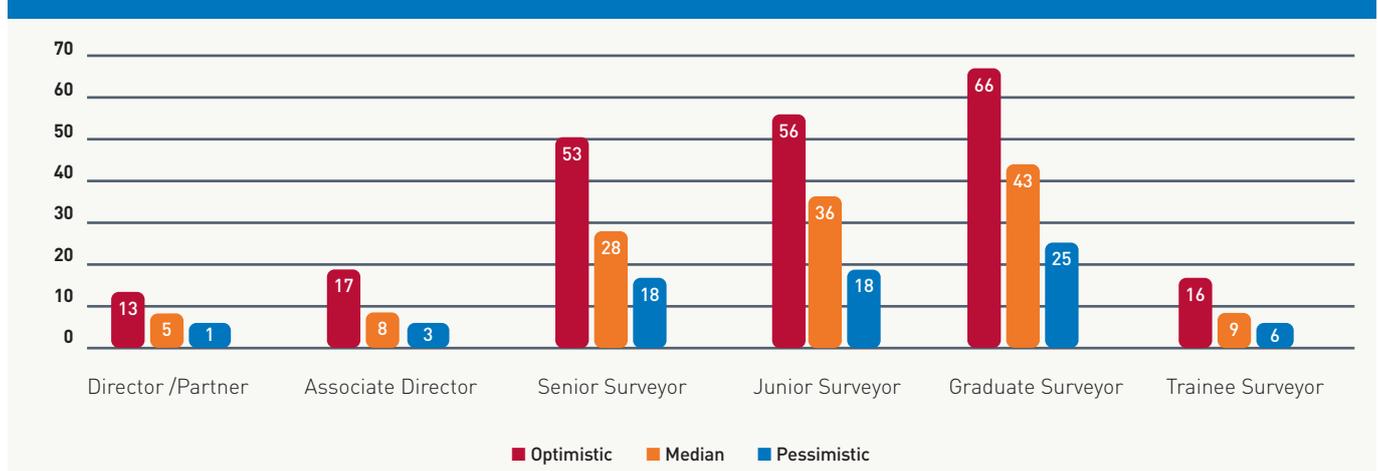
2.2.3 Demand for Construction Surveyors

Construction surveyors make up the largest proportion of SCSi membership and are engaged in a diverse range of activities. The construction surveying designation comprises several pathways, including:

- Building Control
- Building Surveying
- Project Management
- Quantity Surveying (QS) and Construction
- Taxation allowance

Respondents to this research were primarily either Building Surveying or QS professionals with the variance in response rate obtained between Building Surveying (24%) and QS (28%). Given the divergence in response rate and resultant differing multiplier, the two disciplines are considered separately to project additional employment growth.

FIGURE 15: DEMAND FOR ADDITIONAL LAND SURVEYORS 2023-2026.



2.2.3.1 Building Surveying

Building Surveyors are involved in activity across every built environment sector including residential, commercial, industrial and health and specialise in construction technology, building pathology, measurement and analysing design and building defects.

For this reason, the Building Surveying profession is critically important in advising clients about energy performance, building control regulations and remediation of legacy defects such as pyrite.

One third of Building Surveying respondents were based in Dublin with 22% based in the Mid-West (Clare, Limerick or Tipperary) which is a divergence from the research population as a whole wherein the majority of respondents were within the Dublin area. Similarly, to other designations, the majority of respondents (in this case 71%) represented organisations with fewer than 10 people employed.

As noted in the previous section a 24% response rate from the Building Surveying discipline was obtained, therefore the multiplier applied to the data collected is 4.2. The grossed-up additional demand for Building Surveyors is provided in **Figure 16**.

The projected additional demand for Building Surveyors is centered around junior and senior levels, however, the data suggest reasonably strong demand for graduates and at the Associate Director level also.

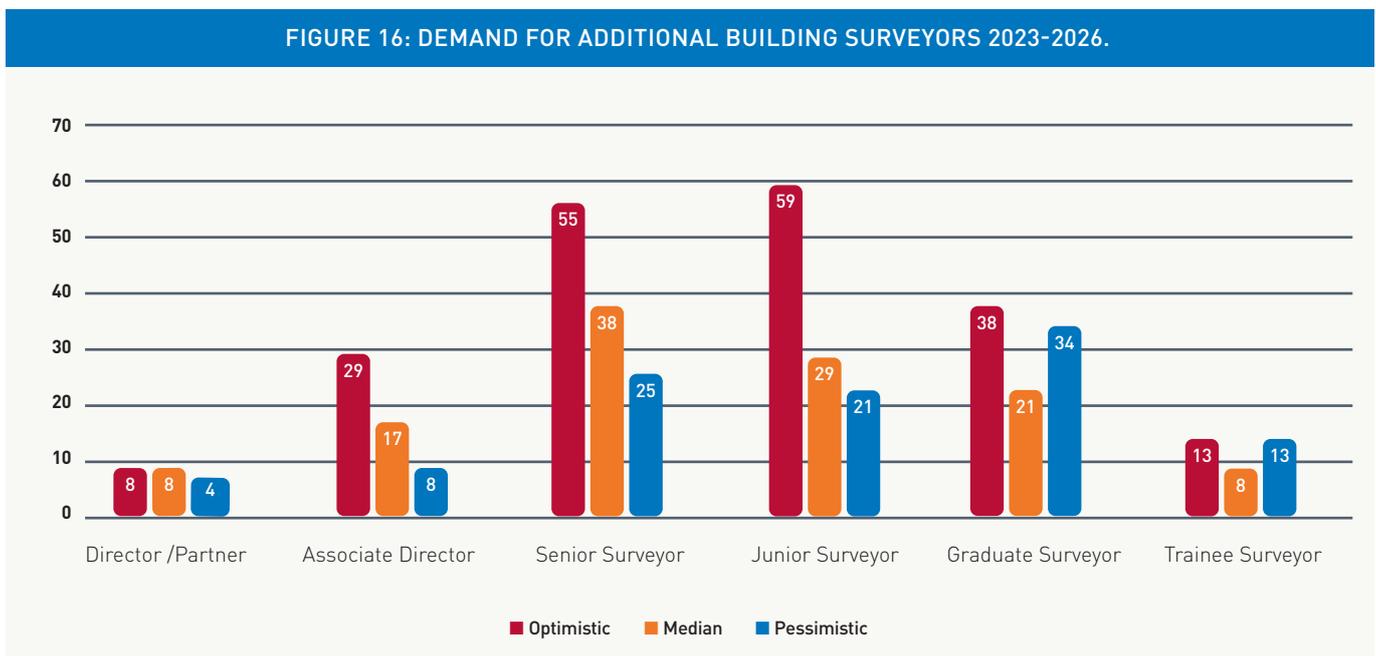
As opportunities at the senior level are filled, additional opportunities may likely become available at lower levels thereby an encouraging sign for promotional prospects.

Based upon the data obtained from key informants, under the pessimistic scenario of economic growth, the number of additional graduate surveyors demanded is higher than under the median scenario.

It may be the case that under this scenario lower-paid graduates may be employed as organisations aim to future proof the business in a more cost-effective manner.

The projected additional demand for Building Surveyors is centered around junior and senior levels, however, the data suggest reasonably strong demand for graduates and at the Associate Director level also.

FIGURE 16: DEMAND FOR ADDITIONAL BUILDING SURVEYORS 2023-2026.



2.2.3.2 Quantity Surveying

Quantity Surveyors (Qs) are the cost managers for construction and are involved at every stage of the construction process across all sectors, public and private.

The QS profession is arguably the one most sensitive to changes in public sector spending thereby exacerbating the cyclical nature of the profession. Over half (54%) of QS respondents were based in the Dublin area with 52% working within firms employing fewer than 50 people.

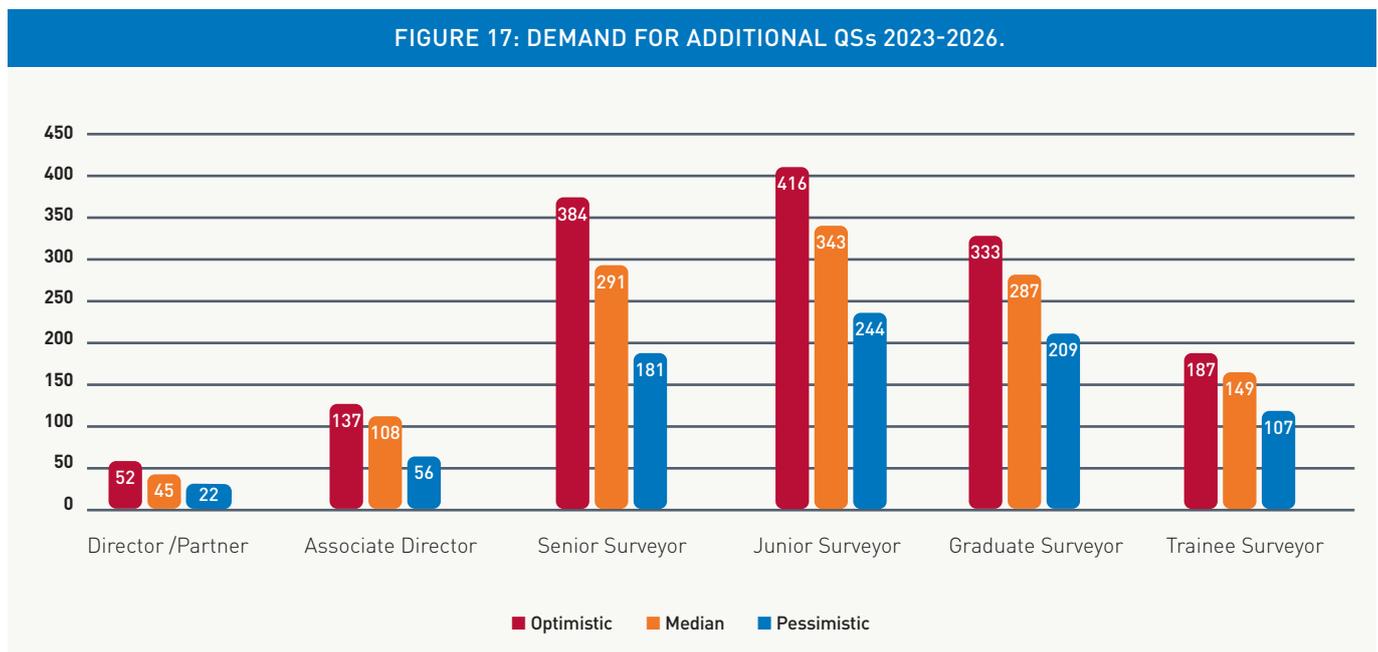
Strong additional demand is projected over the period for junior and senior level Qs in addition to graduate surveyors.

The QS pathway is the largest within the SCSi, from which a 28% response rate was obtained (representing 91 companies). A multiplier of 3.6 was therefore applied to the data collected to gross responses up to reflect the population as a whole. The projected additional demand for QS employment over the period, 2023-2026 is presented in Figure 17.

Strong additional demand is projected over the period for junior and senior level Qs in addition to graduate surveyors. Once again, as more senior positions are filled through promotion, it is likely that additional junior opportunities may become available. Considerably fewer Director level positions are projected over the time period. Previous research has indicated that during the recession (2008-2013) whilst many practices downsized, they inadvertently became “top-heavy” with perhaps more Director-level employees than necessarily required. This low number of additional staff at this level may merely reflect the ongoing adjustment in this regard.

Strong additional demand is projected over the period for junior and senior level Qs in addition to graduate surveyors. Once again, as more senior positions are filled through promotion, it is likely that additional junior opportunities may become available. Considerably fewer Director-level positions are projected over the time period.

FIGURE 17: DEMAND FOR ADDITIONAL QSs 2023-2026.



2.3 Future Supply of Property, Land and Construction Professionals

The future additional supply of qualified property, land and construction professionals is estimated based on current enrolment on SCSI-accredited programmes.

The SCSI currently accredits 24 programmes (and recognises an additional 4) ranging from level 6 (Higher Certificate) to level 9 (MSc) on the National Framework of Qualifications (NFQ). The programmes are offered within 7 HEIs on 11 campuses nationwide. Additionally, the SCSI accredits a range of online academic programmes delivered by the HEIs in question.

The future additional supply of qualified property, land and construction professionals is estimated based on current enrolment on SCSI-accredited programmes.

A full list of programmes is contained in Appendix I. Enrolment data was collected from each HEI offering SCSI-accredited programmes. The average duration of an honours (level 8) degree in surveying is

four years, therefore aligned to the timeframe used to project future demand (2023-2026).

Often those registering at a lower entry point continue up the levels and thus take slightly longer to obtain a degree, but equally, those enrolled on Masters (level 9) usually complete the qualification in less than three years.

The enrolment data presented includes all SCSI-accredited property and land programmes, in addition to one Auctioneering, Valuation and Estate Agency programme (upon completion of which many learners complete a level 8 programme in a shortened timeframe). In the case of construction-related programmes, only Building Surveying and QS programmes are included in the analysis.

A significant number of learners are currently registered on accredited construction project management programmes (more than 200 nationwide) however, as a consequence of limited participation from key informants in this designation, the future supply of qualified construction project management surveyors cannot be compared to demand at this time.

Specialist programmes, for example, Mechanical and Electrical (M&E) QS are also excluded from the analysis as oftentimes learners undertaking such programmes are qualified and practicing QSs seeking to specialise (thereby not an addition to the future labour supply).

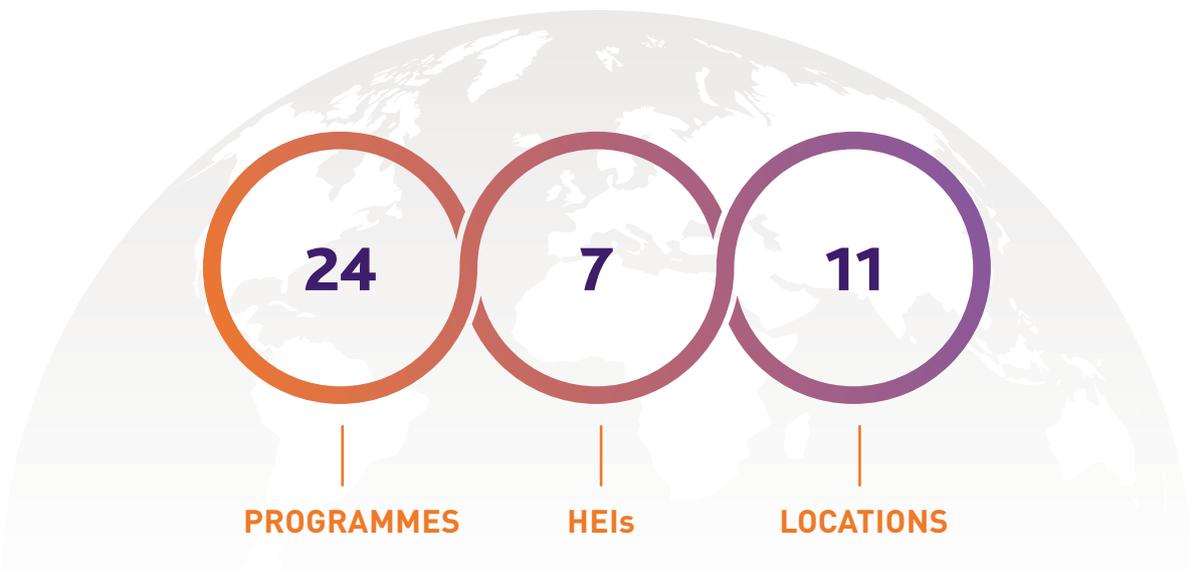


Figure 18: SCSI-accredited education programmes.

Programme	Level	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Property							
Higher Cert in Property Services & Facilities	6	52	23				75
BSc Auctioneering, Valuation & Estate Agency	7	34	34	24			92
BSc (hons) Property Economics	8	65	50	65	80		260
MSc Real Estate	9	27	10	17			54
TOTAL PROPERTY							481

Land							
BSc (hons) Geomatics	8	16	10	9	13		48
MSc GIS	9	12	1				13
MSc Spatial Planning	9	8		14			22
MSc GIS & Remote Sensing	9	16					16
TOTAL LAND							99

Construction							
BSc (Hons) Building Surveying	8	10	19	5	13		47
MSc (Hons) Building Surveying	9	30					30
Total Building Surveying							77
BSc Quantity Surveying	7	31	14	17			62
BSc (Hons) Quantity Surveying	8	359	203	208	197	23	990
MSc Quantity Surveying	9	68	26	26			120
Total QS							1,172
TOTAL CONSTRUCTION							1,249

Table 3: Current enrolment on SCSI-accredited programmes.

As previously noted, current enrolment across all SCSI-accredited programmes is used as a measure of the future supply of surveying professionals and is detailed in Table 3. Programme titles may vary,

however, the figures are aggregated based on the discipline and level of the NFQ. A comparison of student enrolments between 2014 and 2023 is provided in Table 4.

Total enrolment (all levels)	2014	2018	2023
Property	323	530	481
Land	Not recorded	101	99
Construction:			
Building Surveying	84	93	77
Quantity Surveying	428	853	1,172

Table 4: Surveying student enrolment 2014, 2018 & 2023.

The previous “Employment Opportunities and Future Skills Requirements” report (2018) noted a marked increase in the number of QS student enrolments since the first report (2014) and it is clear from **Table 4** that this trend has continued. A range of explanations for this continued increase in QS enrolment include:

- ongoing promotion of surveying careers;
- improved market conditions giving the perception of job security;
- increased number of undergraduate QS degrees offered;
- improved uptake of undergraduate QS programmes outside of the Dublin region;
- marked increase (almost double) in the number of learners undertaking advanced qualifications at level 9 on the NFQ.

There remains only one provider of Building Surveying programmes in Ireland which is an ongoing issue for this profession given their role in the Building Control (Amendment) Regulation (BCAR), Building Energy Rating (BER), energy performance and remediation of legacy defects. Greater accessibility to SCSi-accredited programmes in the regions could prove valuable in encouraging more candidates to choose Building Surveying as a career. Furthermore, the confirmed location of Building Surveying members nationwide supports this proposition. At the time of writing, there remain fewer SCSi-accredited property programmes compared to construction, and enrolment on the programmes has declined since the 2018 report.

However, there is a range of programmes in other jurisdictions that provide routes to a career in surveying, and in the case of property, for example, qualifications outside the State are recognised for Property Services Regulatory Authority (PSRA) licencing purposes. In addition, the Institute of Professional Auctioneers and Valuers (IPAV) also accredit a small number of level 6 programmes consequently increasing the supply of property professionals. The estimation of additional labour supply emanating from international programmes or IPAV lies outside the scope of this research.

Since the 2018 report, several “earn as you learn” part-time programmes have been developed for which demand is strong across property, land and construction.

The provision of such programmes provides a wider range and access to pathways to becoming a surveyor. These programmes allow learners

to gain valuable industry experience and an income, whilst undertaking an accredited surveying programme. The programmes have increased the number of learners completing accredited surveying education, and the scope exists to expand upon this offering with the development of surveying apprenticeships (discussed in section 2.5).

2.4 Projected Future Demand v Supply of Surveying professionals

The previous sections have outlined the projected demand for property, land and construction professionals based on three scenarios of economic growth presented to a senior key informant from each SCSi member practice.

In addition, current enrolment on accredited third-level surveying programmes nationwide has been established to reflect an additional supply of surveying professionals over the period in question, 2023-2026. The purpose of this section is to compare projected demand against future supply to estimate the likelihood of a labour shortage or surplus of property, land and construction professionals.

Current market uncertainty makes this determination challenging, and additional surveying professionals may enter the market, perhaps returning from abroad. Similarly, it is also possible that as Covid-19 related restrictions have been removed, younger professionals may wish to travel thereby reducing the available supply of graduates entering the workforce in Ireland.

Furthermore, economic uncertainty is currently negatively impacting activity across the construction and built environment sector but could moderate as rapidly as it worsened.

This scenario could be reflected in 4% p.a GDP growth whereas ongoing inflation, particularly energy costs, may mean that the pessimistic scenario of 2% p.a. GDP growth may come to pass, at least in the short term.

2.4.1 Property Surveying

Of 421 key informants, 82 usable responses were received thereby providing a response rate of 19%. To project future demand representative of the overall population, the data obtained from key informants was grossed-up by a factor of 5.3.

As noted in section 1.2, grossing up a sample by a factor of 5.3 gives us 95% confidence that the results presented lie within a +/- margin of error of 10%.

Figure 19 displays the additional demand for property surveyors at every level based upon three scenarios of economic growth (4% p.a.; 3% p.a.; 2% p.a.) which is compared to the additional supply of property professionals over the period in question 2023-2026.

Under an optimistic scenario of economic growth, the data indicates that there will be a significant shortage of property surveyors, with demand being over twice the level of supply. In the median scenario, a shortage of property surveyors is also likely to occur but to a lesser extent than in the optimistic scenario, but it is still considerable. Any shortage will undoubtedly put continuing pressure on wage inflation and is likely to result in staff transferring between organisations under such competitive labour market conditions.

Under an optimistic scenario of economic growth, the data indicates that there will be a significant shortage of property surveyors, with demand being over twice the level of supply.

Should the pessimistic scenario occur there may be a surplus of property surveying professionals. The breadth of technical and transferrable skills developed through the education and experience of Property Surveying professionals result in a variety of opportunities available both within and outside of the built environment sector, thereby even in a pessimistic scenario there will remain strong demand for people holding a Property Surveying qualification. Furthermore, Chartered Surveyors have the additional benefit of global recognition of the profession.

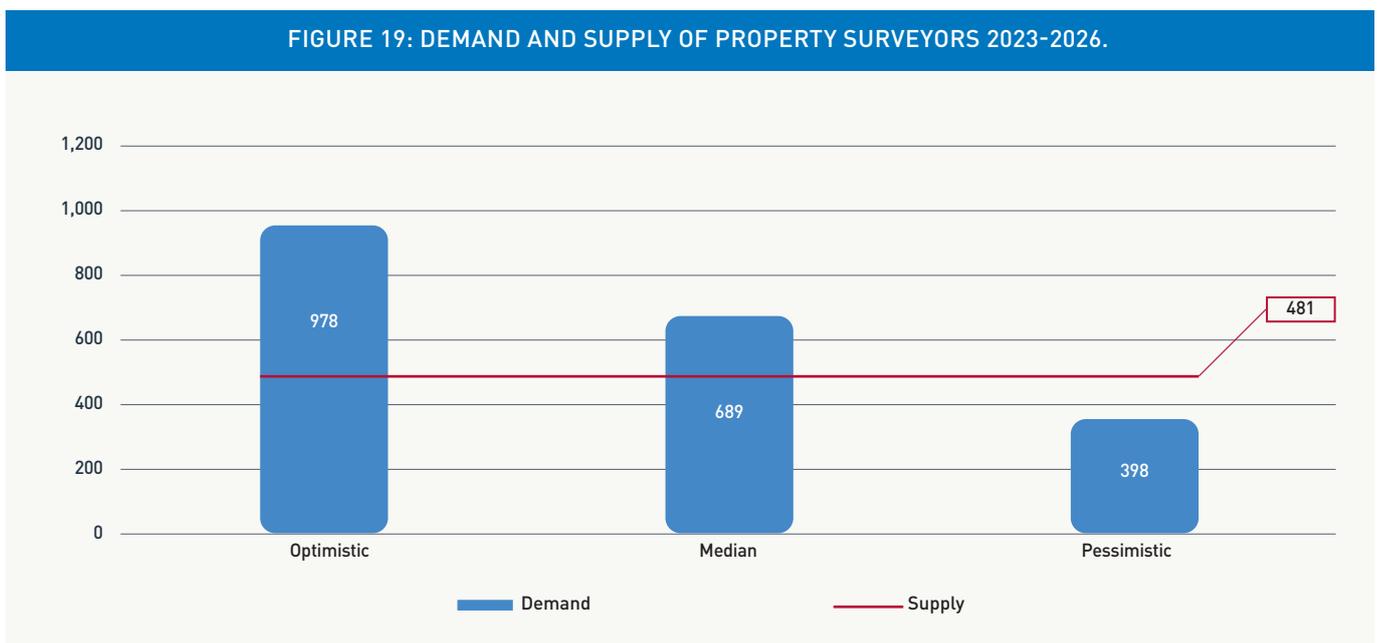
In a pessimistic scenario, many graduates may decide to continue their studies, and for property surveyors scope exists for the development of a range of higher-level qualifications in in-demand areas such as asset and fund management, Environmental Social Governance (ESG) and property data analytics.

The combination of a property undergraduate qualification with a specialism in these areas could be beneficial in the long run.

“In recent times, the emergence of certain specialist roles within property has led to a recruitment challenge. Functions such as asset management, investment analysis and fund management are key roles within investment companies and require key expertise.”

Claire Solon, M.D Greystar Ireland

FIGURE 19: DEMAND AND SUPPLY OF PROPERTY SURVEYORS 2023-2026.



2.4.2 Land Surveying

As noted in an earlier section, the land surveying designation has fewer members than property or construction and while the response rate from key informants was very high (82%) this reflects a small number overall. A multiplier of 1.2 was applied to responses received from land surveying informants, and the data received is compared in **Figure 20** to the likely supply of newly qualified land surveying professionals.

Based on the data collected there may be a shortage of land surveyors in either the optimistic or median scenarios of economic growth. The shortage under the optimistic scenario is particularly concerning, with over twice the number of land surveyors required compared to likely throughput from the third-level sector.

The pessimistic scenario on the other hand may result in an excess number of land surveying professionals supplied compared to projected demand. In this eventuality, graduates may undertake further qualifications, work abroad or indeed transfer out of the built environment sector altogether.

The range of transferrable skills developed throughout the education, training and experience of surveying professionals are applicable across numerous business sectors thereby generating a wide range of opportunities. It is not possible within the scope of the current research to project demand for Land surveying professionals outside of SCSi membership firms.

As previously noted, becoming a Chartered Surveyor provides international recognition of the profession thereby opening up opportunities abroad.

2.4.3 Construction Surveying

The construction surveying designation includes several disciplines, however, due to the previously noted low number of respondents representing some pathways, only Building Surveying and Quantity Surveying are reported within the research.

Given the considerable difference between these two pathways, they are reported separately in the following sections.

Based on the data collected there may be a shortage of land surveyors in either the optimistic or median scenarios of economic growth.

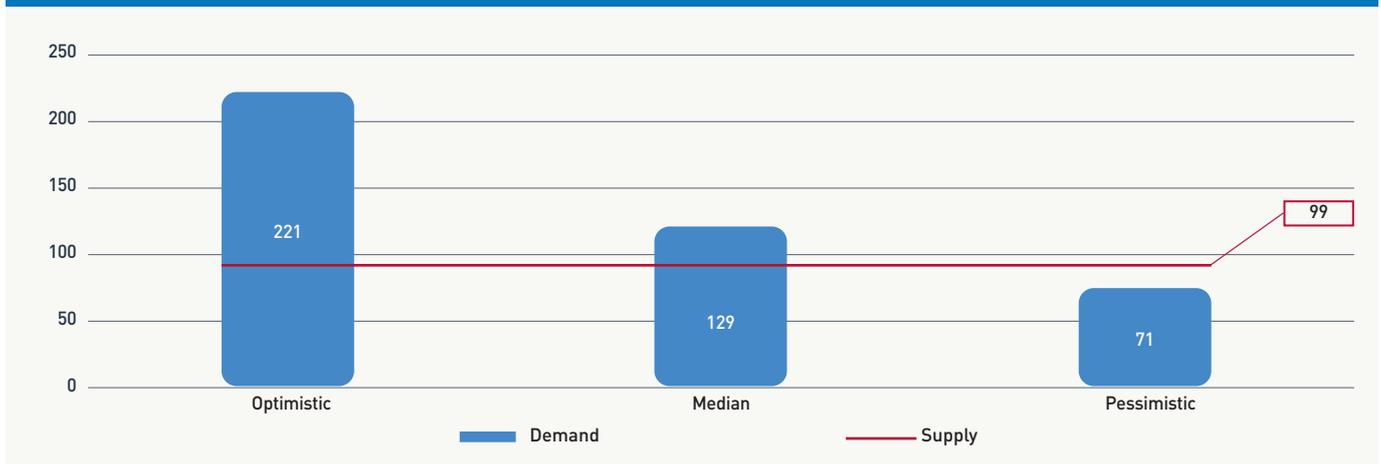
2.4.3.1 Building Surveying

This research identified 76 key informants from the Building Surveying profession from which 18 responses were received.

The response rate of 24% thus resulted in a multiplier of 4.2 being applied to the data received to gross the projection up to the overall Building Surveying population.

The possible future demand for Building Surveying professionals based upon three scenarios of annual economic growth (4%, 3%,

FIGURE 20: DEMAND AND SUPPLY OF ADDITIONAL LAND SURVEYORS 2023-2026.



2%) is compared to the throughput of additional Building Surveying professionals nationwide and is displayed in **Figure 21**.

As can be seen from **Figure 21**, based on data obtained for the research it is possible that under any of the three scenarios of economic growth over the period 2023-2026 there will likely be a shortage of Building Surveying professionals.

Building Surveyors play a critical role as assigned certifiers as part of BCAR in addition to the retrofit of existing buildings for energy performance. With the ongoing climate and energy crises, the demand for Building Surveyors will continue to grow to meet ambitious targets set out in the Climate Action Plan.

“Building Surveyors are engaged across the built environment sector with involvement in every sub-sector and for both new and existing assets. Due to sub-standard construction during the property boom in the early 2000s we are still and will be for some time addressing the legacy defects including pyrite, mica and fire safety issues in apartment complexes. There is also a general ongoing need to repair and maintain our built assets therefore there will remain a demand for building surveyors. At the moment there remains only one third-level institute offering building surveying programmes, which is an ongoing issue limiting the future supply of building surveying professionals where there is an obvious shortage in the sector and demand in the industry.”

Kevin Hollingsworth, Chartered Building Surveyor, MD Omega Surveying Services.

The shortage of Building Surveyors must be addressed as a matter of urgency. Consideration should be given to the development of an additional Building Surveying programme to increase accessibility to a wider group of potential learners (see recommendation 3.3).

Scope also exists for another level 9 conversion programme in Building Surveying to provide opportunities to obtain a qualification in this profession.

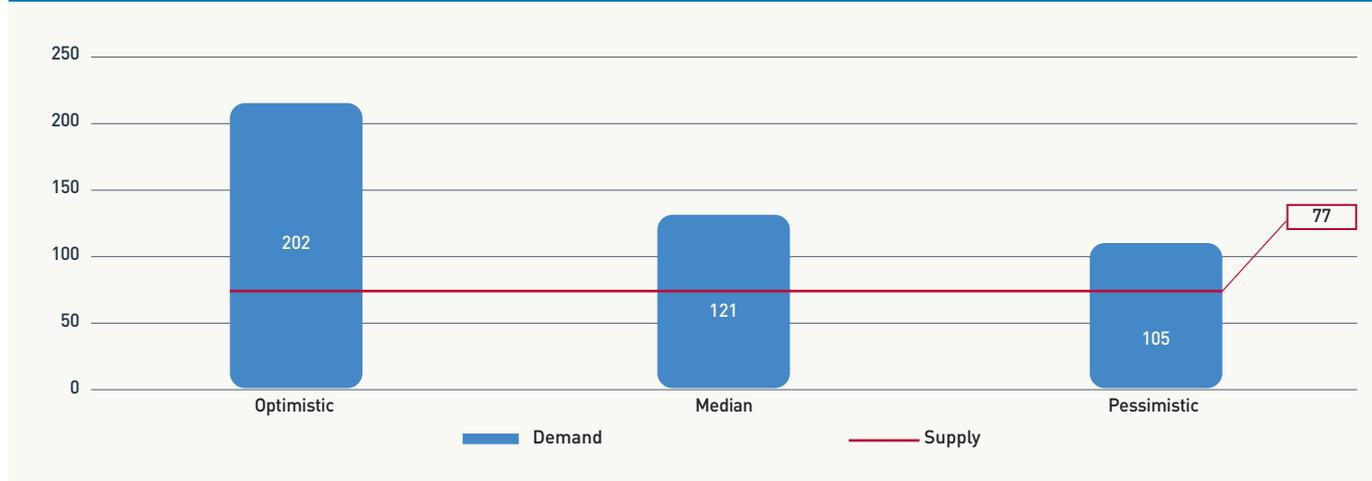
With the ongoing climate and energy crises, the demand for Building Surveyors will continue to grow to meet ambitious targets set out in the Climate Action Plan.

2.4.3.2 Quantity Surveying

Quantity Surveying (QS) is the largest surveying designation within the SCSl. The first Employment Opportunities report published in 2014 highlighted the severe shortage of QS professionals at the time, and subsequently, QS was included on the critical skills list.

Ongoing promotion of the profession has resulted in the number of students registered on QS programmes tripling since that time to address the perceptible shortage.

FIGURE 21: DEMAND AND SUPPLY OF ADDITIONAL BUILDING SURVEYORS 2023-2026.



Responses received from QS key informants were grossed up by a factor of 3.6 to reflect the overall population and likely additional demand for QSs at every level based on the three scenarios of annual economic growth are presented in **Figure 22**. A previous section noted the marked increase in the number of enrolments in QS programmes nationwide, which is demonstrative of the efforts to promote the career to address the perceptible gap identified in 2014 and 2018. Whilst the findings presented in **Figure 22** contrast with the 2018 report, wherein an additional 2,558 QS professionals were identified as being required under the optimistic (4%) scenario, this figure must be put in context. In 2018 the country and the construction sector had emerged from a deep and prolonged recession plus almost a decade of under-investment, therefore the rapid job growth within the profession was from a relatively low base at the time. Prevailing market conditions currently are dissimilar to that of 2018, given the previously discussed economic challenges, therefore it is likely that responses were conservative as several respondents noted they were adopting a “wait and see” approach to recruitment until inflation and international conditions moderate.

“We have seen a lag in some commencements due to current market conditions, but there are many opportunities for QSs going forward in areas relating to sustainable construction such as residential retrofit, and other facets of the business including remediation work and dispute resolution. Within our practice, we are extremely busy and the workload would support the recruitment of additional staff; however, we are going to take a cautious approach to staff recruitment for the moment until the market stabilises.”

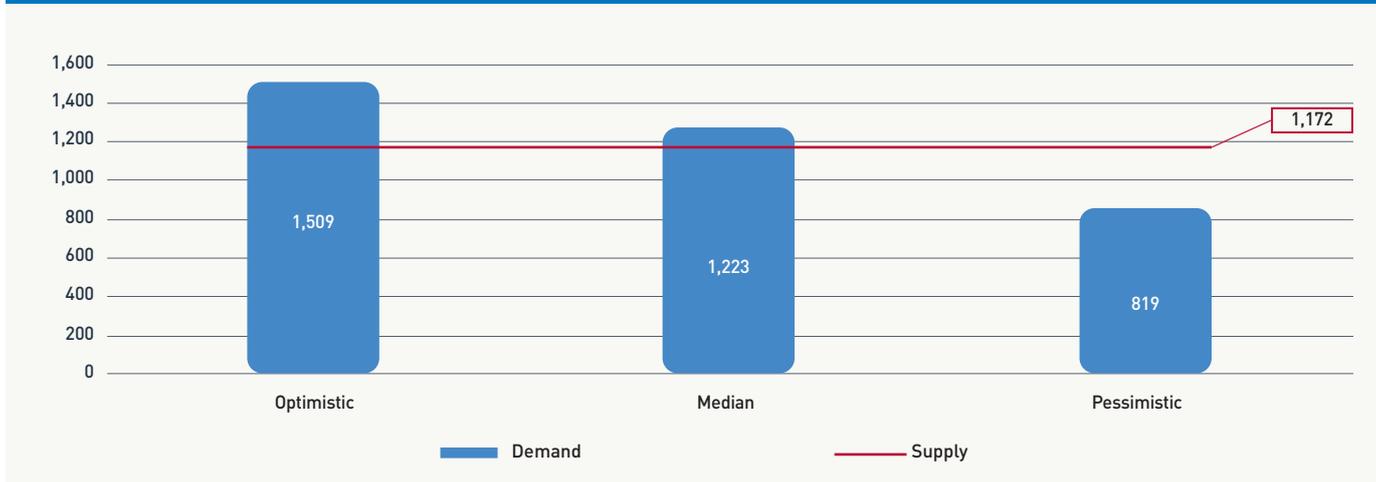
John Nolan, M.D Austin Reddy & Company

It is important that expertise is developed in areas wherein future opportunities are identified, including sustainable construction. Considerable prospects for QS professionals remain in addressing the critical housing shortage and other priorities set out in the NDP and Climate Action Plan, but also in the varied roles that QS professionals perform across other public and private sectors of the economy.

QSs are increasingly employed in sectors outside of the built environment (e.g. management consultancy, financial services, retail and the public sector), therefore while this research may infer a potential surplus of QSs in a pessimistic scenario, it does not reflect the range of opportunities for QSs in other sectors. QSs are educated and trained in a variety of technical and transferrable skills, thereby developing competencies that are demanded in other sectors of the economy in Ireland and abroad (particularly for Chartered QSs). Within the scope of the current research, it is not possible to quantify additional employment opportunities across all economic sectors for QS professionals.

Considerable prospects for QS professionals remain in addressing the critical housing shortage and other priorities set out in the NDP and Climate Action Plan, but also in the varied roles that QS professionals perform across other public and private sectors of the economy.

FIGURE 22: DEMAND AND SUPPLY OF ADDITIONAL QSs 2023-2026.



2.5 Surveying Apprenticeship

There is growing momentum for the development of a range of new apprenticeship programmes nationwide to foster a broader range, diversity and access to pathways for a range of professions.

At present, consideration is being given to the potential for the development of surveying apprenticeships. Currently, there are two apprenticeships relating to the property and construction sectors (Table 5).

57% confirmed that it was either likely or very likely that their organisation would employ an apprentice.

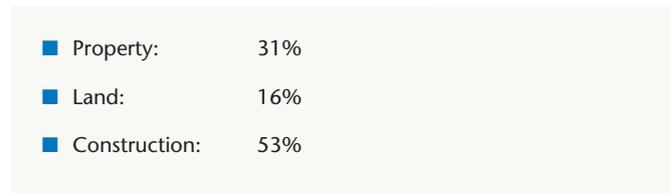
Key informants were asked how likely it was that their organisation would employ a surveying apprentice should the programme be developed.

In total, 131 senior key informants (of 230), or 57%, confirmed that it was either likely or very likely that their organisation would employ an apprentice (see Figure 23).

Whilst the research confirms a positive sentiment towards the potential employment of apprentices, it must be noted that respondents were responding based on a notional programme.

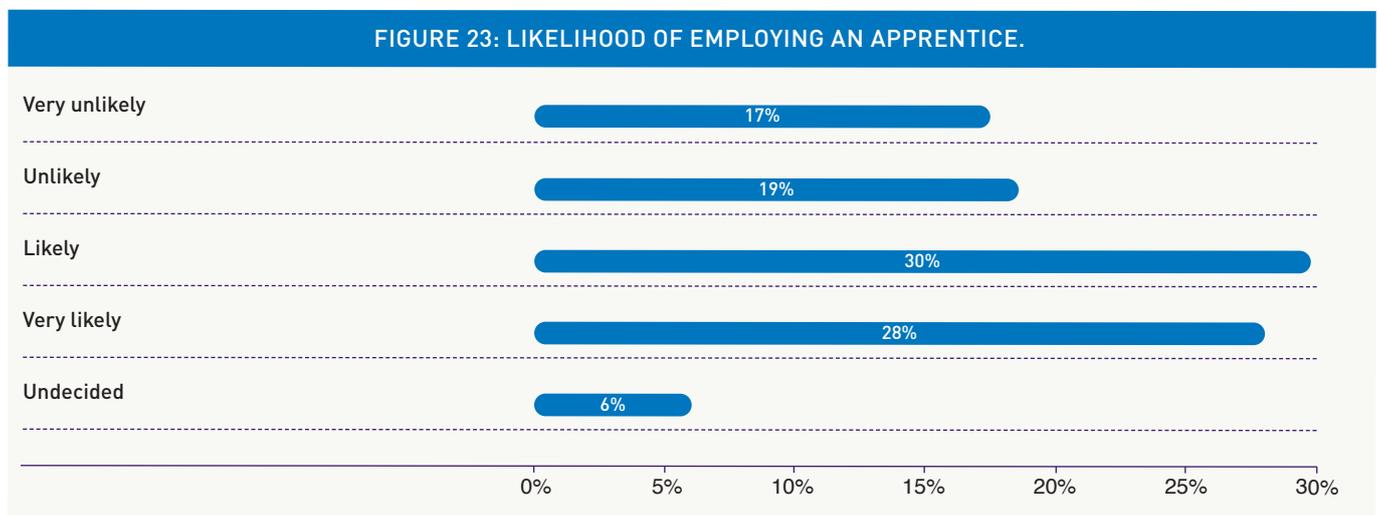
At the time of writing no undergraduate surveying apprenticeship existed and the findings herein must therefore be considered in that context.

The confirmed designation of these 131 informants, that noted it was likely or very likely to employ an apprentice, was as follows:



Title	NFQ Level	Duration	Proposer	Collaborating Partner
Auctioneering & Property Services	6	2 years	City of Dublin Education and Training Board (ETB)	Cork ETB
Advanced Quantity Surveying	9	2 Years	SCSI	ATU (Sligo)

Table 5: Property and construction apprenticeship.



	Surveying Total	Property Total	Land Total	Construction Total	Building Surveying	Quantity Surveying
Number	385	104	81	200	41	159
Average	3	3	4	3	4	3
Min	1	1	1	1	1	1
Max	30	10	30	25	25	15
Median	2	2	2	2	2	2

Table 6: Likely number of apprentices employed 2023-2026.

These 131 respondents were then asked to estimate how many apprentices would likely be employed over the period in question (2023-2026), the results of which are presented in **Table 6**.

The number of respondents that confirmed the likeliness of engaging an apprentice is encouraging (57%). While the maximum number of apprentices employed by a single company is confirmed as being 30, the median number of apprentices employed stands at 2. The low median across a large number of companies is a positive finding lowering the risk of overreliance on a small number of employers. Furthermore, the number of employers will provide an opportunity for a shared apprenticeship approach whereby an apprentice has the prospect of changing employment during their training period.

This may provide the apprentices with broader experience in various aspects of their chosen pathway and also mitigate risks associated with economic cyclicality.

“Whilst the current macroeconomic outlook is somewhat unclear, the needs of our industry are very clear. We need to attract and retain more people into the industry. We also need more apprenticeships; it needs to become an attractive long-term financially viable option to have a trade that can support the built environment.”

Lily Ellis, Global Alliance Director, CBRE Global Workplace Solutions

As was done for the projection of future demand, it is possible to apply a multiplier (based on response rate for each designation) to the data presented in **Table 6**.

When the multiplier is applied, as many as 1,228 apprentices may be employed over the period in question, which includes an adjustment for one outlier within each surveying designation (two for QS) to ensure the total remains a conservative estimate. The above figures may be in addition

Property	Land	Building Surveying	QS	Total
551	91	92	494	1,228

Table 7: Potential apprentice employment 2023-2026.

to the projected demand detailed in section 2.2, however, once again caution must also be expressed in applying a large multiplier in the case of property surveying.

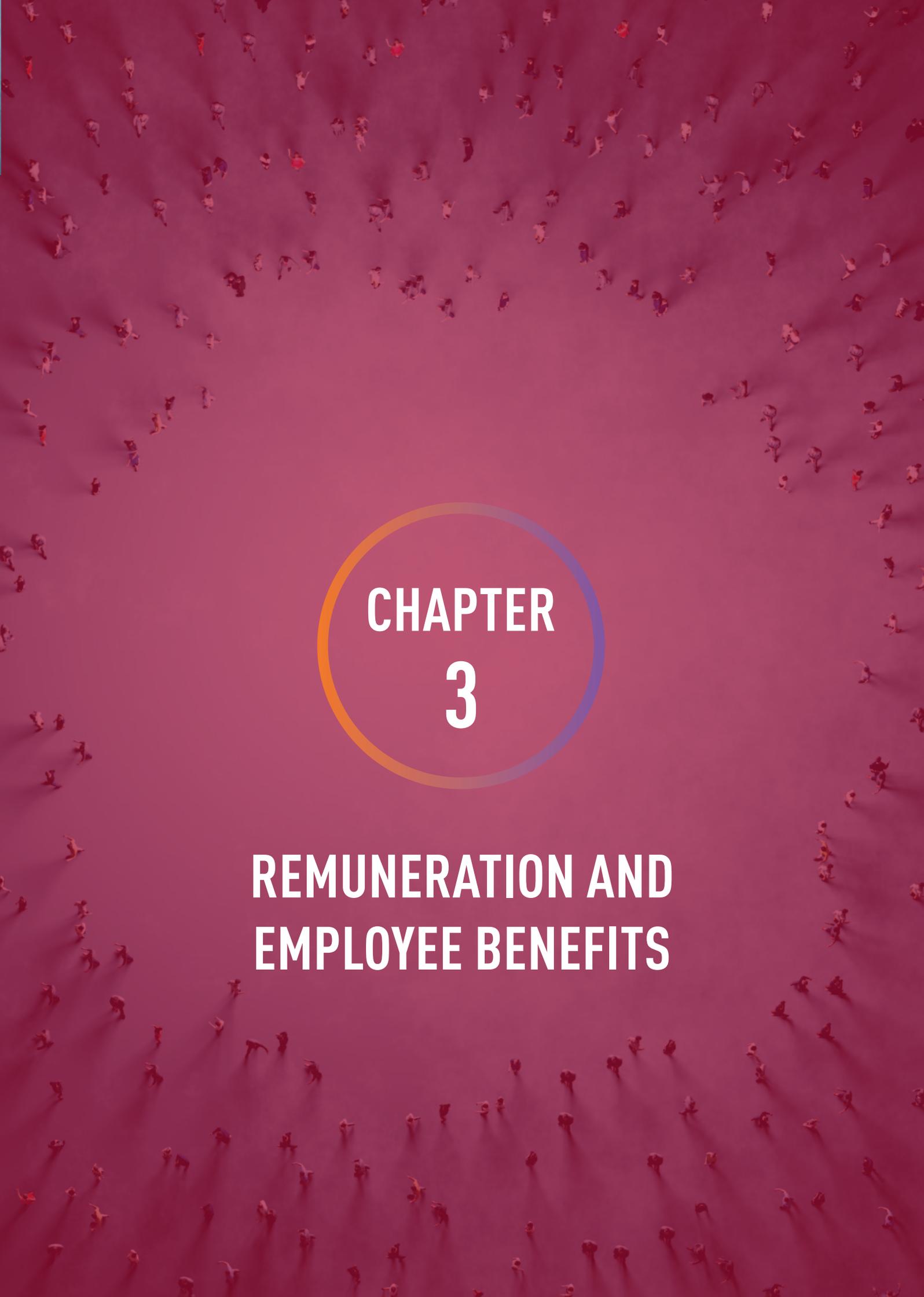
While the findings are interesting and demonstrate a positive sentiment towards the proposed development of surveying apprenticeships, they cannot be deemed conclusive until further stakeholder consultation is undertaken.

2.6 Conclusion

The preceding analysis has identified a strong demand for property, land and construction professionals over the period 2023-2026 based on the median projection of economic growth. Demand may exceed supply in an optimistic scenario, however current market uncertainty is leading to a more cautious approach to additional demand in a pessimistic scenario. The education, training and experience of surveyors is transferrable to other sectors, and it is possible that should the pessimistic scenario come to pass that property, land and construction professionals may work across other sectors of the economy.

Furthermore, those that progress to obtain their Chartership will have global recognition of their profession thereby generating additional opportunities for employment. Chartered Surveyors, through the Continuous Professional Development (CPD) programme, have a range of supports, guidance and market insights available to them to enhance lifelong learning in the most up to date issues pertaining to the profession.

The demand for most third-level surveying programmes has increased since the 2018 report, with a sizeable rise in enrolment in QS programmes in particular. Scope exists for the development of additional Building Surveying programmes in addition to higher-level (level 9) qualifications in specialist areas to meet future demand. The research also found an appetite from senior key informant respondents for the development of additional surveying apprenticeships, however further consultation with industry stakeholders is required in its development.

The background is a solid red color with a pattern of small, dark silhouettes of people walking, viewed from an aerial perspective. In the center, there is a circular graphic with a gradient border transitioning from yellow to blue. Inside the circle, the text 'CHAPTER 3' is written in white, bold, uppercase letters.

**CHAPTER
3**

**REMUNERATION AND
EMPLOYEE BENEFITS**



3. REMUNERATION AND EMPLOYEE BENEFITS

The previous chapter analysed current and projected future trends in demand for and supply of property, land and construction professionals based upon three possible scenarios of annual economic growth. At the median level for each designation, it is likely there will be a shortage of qualified surveying professionals which may exert upward pressure on salaries.

The purpose of this chapter is to examine the current remuneration and employment benefits of surveying professionals. Data was collected as part of the online survey administered to SCSi members and therefore reflects remuneration and employment benefits received at every level of experience nationwide.

Previous research from the SCSi (2019)¹ gave detailed insights into remuneration and benefits of surveying professionals at the time, against which current remuneration is compared in the sections to follow. As a point of note, participants in the key informant survey were not asked to provide remuneration-related information, as the focus of that survey lay largely on the determination of future demand for surveying professions.

Consequently, maximum salary values presented in this section, while reflecting senior members of staff (including Director level), cannot be

construed to be the absolute maximum given that over 230 senior personnel were not included in this phase of research. The first section of the chapter outlines the current trends relating to the salaries of surveying professionals and includes a comparative analysis of the 2019 SCSi survey. This is followed by an overview of additional non-pay benefits received.

3.1 Salary Survey

The member survey addressed the area of remuneration for all employees at every level nationwide, and whilst the survey data for part-time workers was collected, the focus of the analysis to follow is entirely based on full-time employees.

A number of Project Manager Surveyors responded to the member survey, consequently, this designation is included in aggregates presented under the construction designation.

The analysis must be contextualised based on the margin of error detailed in section 1.3.3. which differs across designations given the variance in population size and usable responses obtained.

¹ Remuneration and Attitudes Survey 2019, SCSi

	All	Property	Land	Construction
Maximum	€300,000	€300,000	€125,000	€270,000
Minimum	€25,000	€25,000	€30,000	€37,000
Mean	€84,372	€77,766	€66,750	€90,828
Median	€77,199	€70,000	€64,250	€85,000

Table 8: Maximum, minimum, mean and median salary.

Table 8 presents the maximum, minimum, mean and median salaries across property, land and construction professionals reflecting the overall salaries at all levels combined.

As can be seen from **Table 8** the median salary across designations varies considerably, with the overall median being €77,199, varying from €64,250 for land surveyors to €85,000 for construction surveyors. The median value of €77,199 reported herein reflects an increase of 10% on 2019 figures.

	Property	Property: Residential	Property: Commercial	Property: Valuation	Land	Construction
Director / Partner / Principal	€81,000	€60,000	€120,000	€101,000	€50,000	€100,000
Department Manager	€75,000	€59,000	N/A	€96,500	€70,000	€103,800
Associate / Regional Manager	€70,000	€72,500	€80,000	€66,500*	€70,000**	€88,000
Senior Surveyor	€62,000	€42,000	€64,500	€69,425	€75,750	€75,250
Surveyor	€49,000	€40,000	€48,000	€50,000	€76,000**	€57,500
Junior Surveyor	€37,500	€32,500	n/a	€40,000	n/a	€48,000

Table 9: Median salary at each level per surveying designation.

*The figure for Associate/Regional manager may appear anomalous compared to senior surveyor however it is based upon data submitted and may reflect company size of respondents.

**Based upon a single respondent therefore cannot be deemed representative.

Considerable progress has been made in addressing gender imbalance across the built environment sector nationally, however, there remains work to be done to address the ongoing lack of diversity.

Salary will understandably vary considerably between levels within an organisation reflecting the experience of staff. **Table 9** presents the ranges of salary per designation depending upon the position held by the respondent. In the case of property surveyors, a divergence in median salary within specific designations is notable within the table.

For land and construction professionals the median salary for specific designations (e.g. Building or Quantity Surveying within the Construction category) is within the +/- 5% range of the median therefore **Table 9** presents the overall median salary for these designations. But the extent of divergence within property designation, most notably at the most senior

	Female	Male
Full Membership	25%	75%
Property	34%	66%
Land	16%	84%
Construction	10%	90%

Table 10: Gender of SCSi membership.

levels, necessitates the disaggregation of the three largest disciplines within that designation.

Almost three-quarters of respondents (74%) to the research were male, with 25% female. Only three respondents identified as non-binary or decided not to confirm their gender, therefore the sample size for this cohort is prohibitively small to analyse.

Considerable progress has been made in addressing gender imbalance across the built environment sector nationally, however, there remains work to be done to address the ongoing lack of diversity. Current

	ALL	Female	Male
Maximum	€300,000	€280,000	€300,000
Minimum	€25,000	€25,000	€30,000
Mean	€84,372	€74,320	€87,563
Median	€77,199	€70,000	€80,000

Table 11: Salary by gender.

membership of the SCSi reflects the industry as a whole in terms of gender balance, with membership gender presented in **Table 10**.

Table 11 provides the salary information based on gender across all designations combined. Survey findings should not be construed that female respondents generally earn less than males for several reasons. Firstly, there are fewer female SCSi members than males, as detailed in **Table 10**, which will have a distortive effect on the sample size.

In addition, there are proportionately more female members within the Property designation, which has a lower median salary overall than construction.

Another possible explanation is that salary differentials are caused by the lower percentage of female respondents aged 55 and over (5.5%) compared to the overall sample (12%), thereby possibly having less experience in years, hence lower salary at present. However, trends in relation to salary provision across gender should be monitored on an ongoing basis.

The research confirms that geographic location is another factor that influences salary level, with the median salary in Dublin reported as being 16% higher than in the rest of Ireland.

	ALL	Dublin	Rest of Ireland
Maximum	€300,000	€300,000	€200,000
Minimum	€25,000	€28,000	€25,000
Mean	€84,372	€89,565	€73,103
Median	€77,199	€80,000	€68,925

Table 12: Salary by geographic location.

As such, there is a premium paid to those based within the capital.

In the previous 2019 report, the median salary in Dublin was €74,375 and outside of Dublin €61,760, therefore the findings reported herein represent an 8% and a 12% increase, respectively.

Trends in relation to salary provision across gender should be monitored on an ongoing basis.

Another critically important differentiating factor in the analysis of salary is the position held by the respondent in relation to the size of the organisation within which they work.

Table 13 details the median salary at each level within organisations of varying sizes. The information is presented on aggregate across property, land and construction surveying designations.

Overall the median salary increases with company size, and generally that occurs at each level from Junior Surveyor to Director level. A small number of outliers are evident from **Table 13**, this may reflect differing payment structures across companies. 66% of respondents specified

Company Size (no. of employees)	Median Salary	Director or Partner	Associate or Regional Director	Dept. Manager	Senior Surveyor	Surveyor	Junior Surveyor (only c. 2 per category)
0-10	€65,000	€61,000	€75,000	€71,000	€67,000	€49,000	€34,000
11-49	€80,000	€100,000	€80,000	€60,250	€71,500	€65,000	€46,000
50-249	€80,000	€133,500	€80,000	€100,000	€75,000	€50,500	€37,500
250+	€83,250	€134,500	€84,000	€97,500	€80,000	€58,500	€37,000

Table 13: Median salary by company size.

that their salary had increased in the previous 12 months. On closer examination of respondents who reported a salary increase, their previous median salary (based on the 2019 report) was €75,000.

All respondents were asked what their previous salary was (whether the change had occurred within or outside the past 12 months) and the median for all previous salaries was €72,000 (compared with a median of €77,199 at the time of the survey).

3.2 Employee Benefits

Salary is the key component to overall remuneration however, a wide range of additional benefits are provided to employees also. Non-pay benefits are important to reward and incentivise employees and can have a positive impact on performance.

In addition to salary, non-pay benefits can have an impact on attracting and retaining staff which is critically important within a competitive labour market.

The Covid-19 pandemic has caused a shift in attitude to work-life

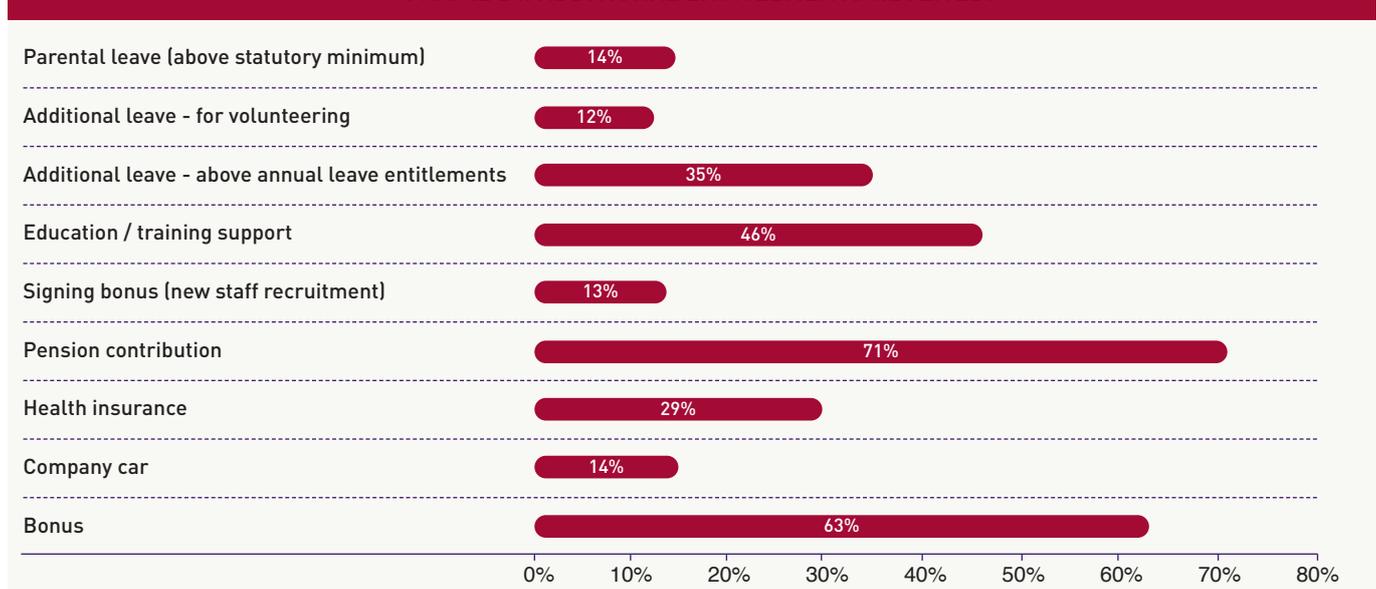
balance, and increasingly flexible work arrangements (discussed in the following chapter) and other non-pay benefits are increasingly prioritised by employees.

Respondents to this research were presented with a range of benefits and asked to select as many as were offered to them within their current employment.

In addition to salary, non-pay benefits can have an impact on attracting and retaining staff which is critically important within a competitive labour market.

Figure 24 shows the proportion of respondents in receipt of each benefit. As is apparent from Figure 24, a wide range of additional benefits are received with pension contributions, bonuses, and education/training support being the top three among respondents. It is interesting to note that no discernible difference across surveying designations is evident from the survey data.

FIGURE 24: ADDITIONAL ENTITLEMENTS RECEIVED.



A range of additional benefits was identified by participants including:

- Car allowances (including petrol/diesel allowances)
- Commission
- Travel and mobile expenses
- Income protection and/or serious illness cover
- Professional subscriptions
- Company shares, stock options or profit sharing
- Gym membership
- Paid maternity leave

Whilst flexible working (where or when job undertaken) was not provided as an option to respondents, several comments were provided that it was a critically important non-pay benefit.

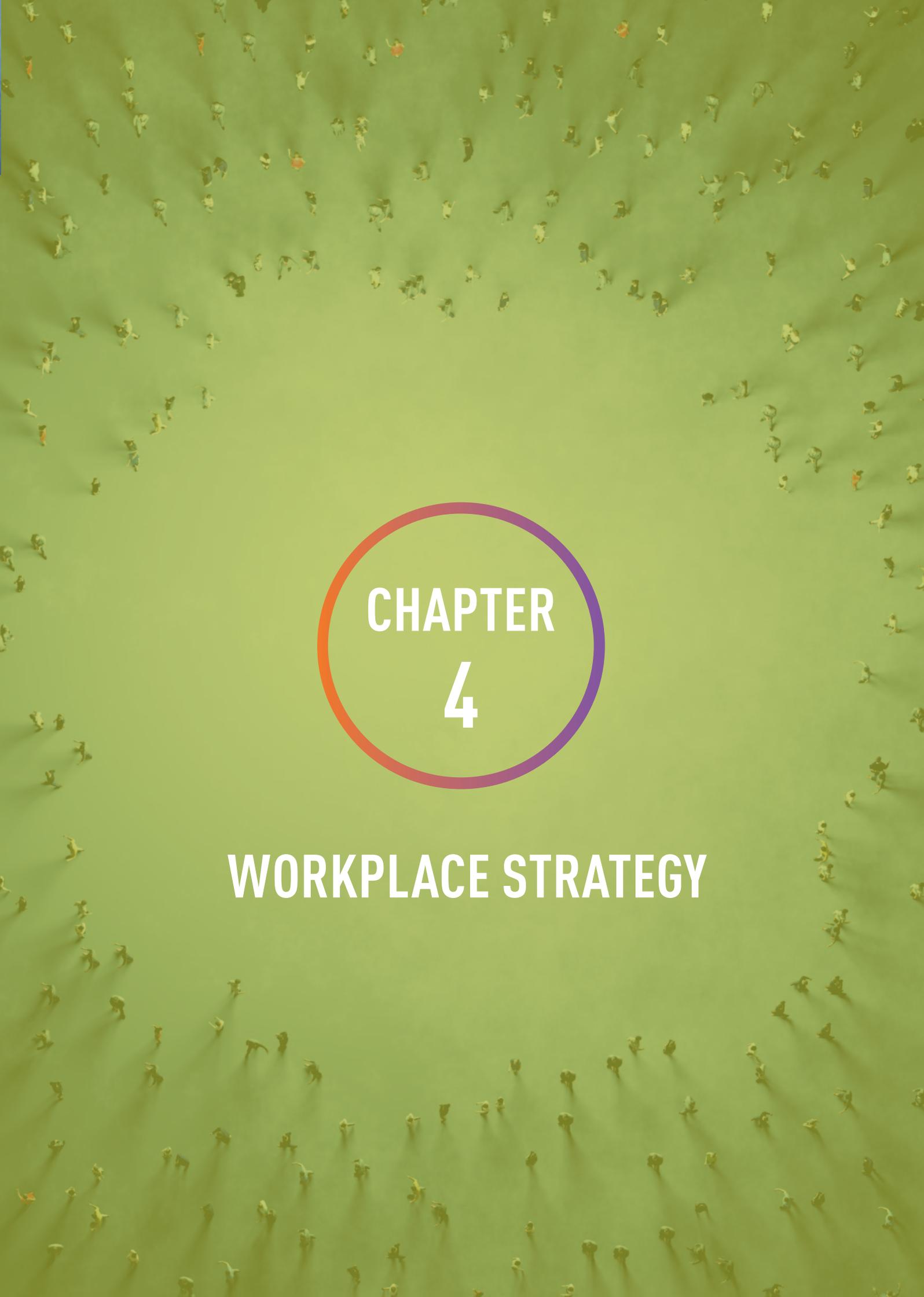
The emphasis on workplace practices has grown considerably since the onset of the pandemic, and workplace strategy in the surveying profession is the focus of the following chapter.

3.3 Conclusion

Data collected for this report confirms that property, land and construction surveyors have received a 10% salary increase in the twelve months before the survey was administered.

The median salary across all surveying professionals now stands at €77,199, with a premium for those located in the Dublin region, receiving 16% higher than those outside Dublin.

A range of additional benefits are received, chief amongst them being pension contributions, bonuses and education/training support.

An aerial photograph of a large crowd of people on a green field, with a central graphic consisting of a circle with a red-to-purple gradient border. The text 'CHAPTER 4' is centered within the circle.

**CHAPTER
4**

WORKPLACE STRATEGY



4. WORKPLACE STRATEGY

The Covid-19 pandemic forced a rapid pivot to remote working for a vast proportion of the workforce globally which represented an instant business model transformation for many organisations. Employers and employees were required to implement significant changes to work practices, requiring a shift in mindset and approach to conducting business, coupled with increasing reliance on technology to enable the transition. Online collaboration platforms were used extensively to foster a virtual work environment allowing businesses to continue operating during a turbulent time.

Currently, a more flexible transition back to the office has resulted in remote (working from home or a hub) or hybrid working (combining remote and on-site work) shaping the future of work. The benefits of remote and hybrid working are widely asserted as including:

- increased labour participation rate;
- improved labour productivity;
- regional and rural development;
- reduced pollution/sustainability gains;
- better work-life balance/well-being.

There are also some possible downsides to remote working, including barriers to communication, lack of innovation and connectivity to peers, in addition to a risk of feeling isolated, decreased visibility and difficulty disconnecting.

Remote working was a feature of workplace strategy in many organisations pre-pandemic, however, there is limited empirical evidence as to its prevalence across surveying professions. Given that hybrid working is likely to remain for the foreseeable future it is important to examine the current and preferred workplace practices for SCSi members.

From an employer's perspective, aligning corporate to real estate strategy has never been more important. Understanding current workplace strategy and the driving forces determining the strategy provides useful insight regarding how surveying practices may be impacted by the right to request remote work, which forms part of the Work Life Balance and Miscellaneous Provisions Bill 2022.

Employers must understand and incorporate the preferences of their workforce into their workplace strategy therefore, an investigation from

both perspectives is warranted. Ascertaining perspectives on the workplace priorities of employees also provides invaluable insight for employers seeking to recruit and retain staff in a highly competitive environment.

The purpose of this chapter is therefore threefold:

- to determine the current workplace strategy of SCSi member practices;
- to ascertain the preferred workplace practices of employees;
- to identify the drivers, benefits and challenges of remote and hybrid working from the perspective of both the employer and employee.

The next section details the results of the survey administered to the key informants, within which respondents were asked to answer a series of questions about their organisation’s current and likely future workplace strategy. This is followed by an analysis of findings from the SCSi member survey to garner the views of the wider membership concerning their current and preferred workplace of the future.

The analysis in both instances is enhanced by the scrutiny of responses contained in open text boxes within each survey, in addition to interviews undertaken across property, land and construction professionals.

One limitation of the research emanates from the lack of a pre-pandemic baseline, thereby rendering a comparison pre-and-post pandemic impossible.

4.1 Key Informant Perspective

This section details findings from the survey administered to a single senior person within each SCSi member practice to respond on behalf of the practice.

The seniority of the person results in the corporate-level viewpoint being captured including the current work practices and driving forces behind the workplace strategy.

Key informants were, in the first instance, asked to confirm the typical workplace of surveying employees, which is presented in **Figure 25**.

For this question, the focus remained on surveying staff to reflect SCSi member practices, therefore, excluding other professions and administrative staff working within the organisation.

As can be seen from **Figure 25**, one-third of respondents have fully returned to the office with only 11% working entirely remotely (at home or in a hub).

Ascertaining perspectives on the workplace priorities of employees also provides invaluable insight for employers seeking to recruit and retain staff in a highly competitive environment.

FIGURE 25: CURRENT WORKPLACE STRATEGY FOR MEMBER FIRMS.



The remaining 56% of respondent firms currently have a hybrid (combination of in-person and remote) workplace strategy, which is broadly consistent with the national average.

Furthermore, the workplace strategy is uniform across professions, with the exception being with property surveyors whereby a higher proportion (44%) confirmed they are fully in the office.

It is not possible to undertake a direct comparison due to the lack of pre-Covid-19 baseline data, however, 57% of respondents confirmed that the workplace strategy had changed as a consequence of the pandemic, but some practices had moved towards flexible working before the pandemic.

“Our company had a policy in place pre-Covid that employees could choose where and when they worked provided it worked for the company and our clients. No one size fits and can change, but typically employees attend 2-3 days per week.”

(Quantity Surveyor).

Of those that indicated that the current workplace strategy had not changed since the pandemic, 72% employed fewer than 10 people and 61% were fully working from the office.

It may be the case that smaller companies lack economies of scale to invest in the technologies required for remote working, or perhaps that reduced connectivity to colleagues or clients is more pronounced in smaller organisations.

For some designations, the type of work undertaken has always required a hybrid approach:

“Land surveying is the core business, which by its nature means that 50% of the work is based away from the office anyway. In principle, the processing of the data collected on-site can be carried out anywhere as long as the technology is available. Our company has no objection to fully flexible working within these constraints as long as targets are met.”

(Land Surveyor).

Considering the future workplace strategy, 82% of respondents indicated that the current strategy was likely to remain in place. The finding confirms that hybrid working is likely to remain across the surveying profession on a long-term basis.

This bodes well in the context of the Work Life Balance and Miscellaneous Provisions Bill 2022. It also reinforces the requirement for organisations to plan and design their workplaces to align corporate and real estate strategies.

Increasingly the office is perceived as a destination therefore the provision of suitable amenities to promote collaboration, communication and a sense of connectivity is required to support organisational culture and ensure an engaged workforce.

Increasingly the office is perceived as a destination therefore the provision of suitable amenities to promote collaboration, communication and a sense of connectivity is required to support organisational culture and ensure an engaged workforce.

This is particularly the case when mentoring new recruits or junior staff as noted by one respondent:

“I work in the office full time to provide support and mentoring for junior staff primarily. Their development was very limited during their remote working. Working From Home on an ongoing basis is not suited to our profession. Whilst senior staff can do their reports at home, the mentoring/management of people is nowhere nearly as effective.”

(Property Surveyor)

It is difficult to cultivate organisational culture when working remotely and the teamwork, collaboration and mentorship required to foster innovation are identified as critically important across all surveying designations.

Furthermore, some respondents noted the possible impact on future progression and promotional opportunities resulting from reduced in-person contact facilitated by hybrid work practices:

“The training for junior staff going forward is a concern throughout firms as they are not getting sufficient training and are taking the opportunity to work from home. Long term, this is going to be an issue regarding their prospects and opportunities for promotions etc.”

(Property Surveyor)

As workplace practices continue to evolve the future of work is likely hybrid, consequently potential impacts on promotional opportunities must be carefully monitored.

To better understand the factors determining the workplace strategy, a range of factors were put to respondents to confirm their opinion on the degree of importance of each. Responses are detailed in **Figure 26**.

The research confirms that productivity is deemed important by the largest proportion of respondents (81%). There remains a difficulty in measuring productivity gains emanating specifically from workplace practices, particularly within the surveying profession whereby there is no pre-pandemic baseline for comparison.

Measuring labour productivity is critically important but productivity improvement and output improvement must be differentiated. The former relates to the rate of output per unit of input (labour) and the latter is increased output (which could reflect increased working time). Both are leading performance indicators for which data must be collected to ensure evidence-based decision-making.

Innovation and adaptability are also believed to be important drivers in determining workplace strategy (74% of respondents). Synergies associated with cross-functional interaction are likely to foster innovation, however once again, challenges remain in measuring and quantifying the impact.

Ongoing monitoring is required to ensure evidence-based decision-making.

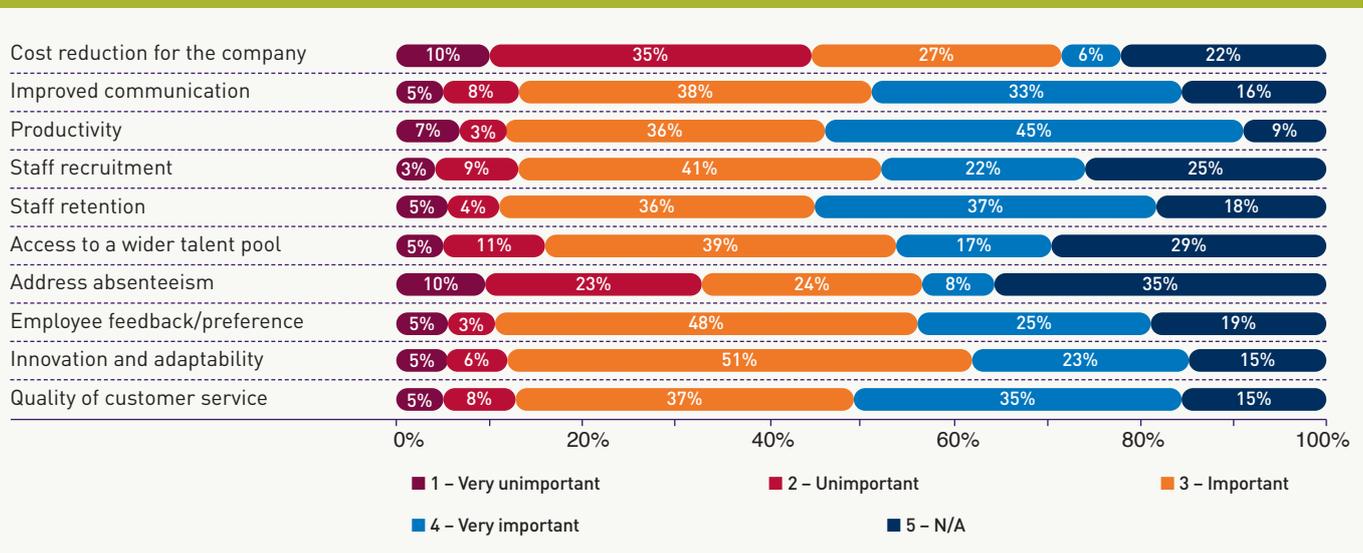
Employee preference is another factor shaping workplace strategy, as noted by the majority of respondents (71%). Comments made by respondents confirmed that employees were consulted before and during the determination of workplace strategy with several noting the administration of employee surveys to inform the choice.

Additionally, almost half (48%) of respondents stated that employees were given the flexibility to determine when their work was undertaken with 59% indicating that employees were given the flexibility to decide where their work was done.

“Employees decide in tandem with their manager where and when they work. The aim is to meet the preference of the employee wherever possible, but by way of example, experienced employees do need to attend the office to guide and train starters, so this does require more office presence than might otherwise be the case.”

(Anonymous respondent).

FIGURE 26: CONSIDERATIONS IN DETERMINING WORKPLACE STRATEGY.



The importance of providing flexibility in workplace practices was a recurring theme in comments made by respondents particularly within a competitive labour market, with one noting:

“The most important asset a company has is their employees. We believe to attract the best, you need to give them freedom of choice.”

(Anonymous respondent).

This perspective was shared by 63% of respondents that confirmed workplace strategy as being important for staff recruitment with 73% identifying it as important for staff retention.

Interestingly, the research finds that cost is unimportant in determining workplace strategy by a considerable proportion of respondents (45%) at present.

This should be monitored over time as data on office space utilisation in the hybrid module becomes more readily available, given that companies may require less space over time.

Related to this is the need to design office space to align with the new paradigm, creating a supportive environment to engage in different

types of work (e.g. collaborative, focused, meeting rooms) supported by the technology required to build a hybrid working environment. Workplace design lies outside the scope of this research.

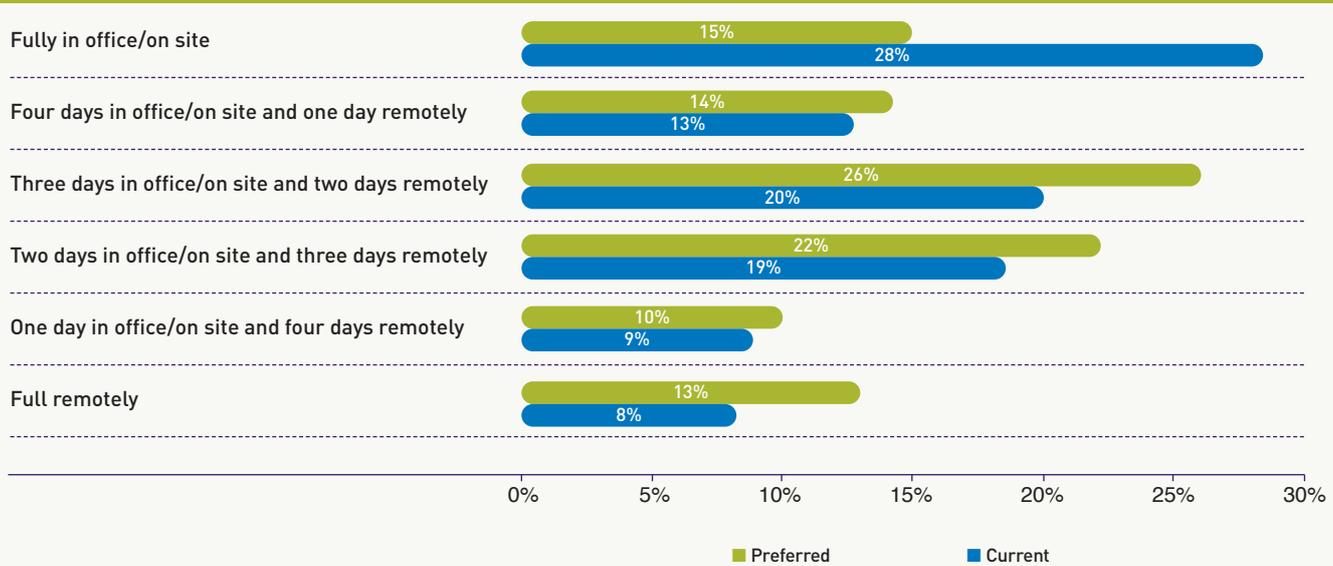
The Work Life Balance and Miscellaneous Provisions Bill 2022, will provide the legal basis for remote working for which upskilling and training will be required to enable all stakeholders to navigate the new requirements. Whilst the legislation may bring a degree of clarity on a range of issues, such as employee rights, the corporate policy must address the complexity of simultaneously meeting client and employee preferences in this regard.

4.2 Member perspectives

Following the determining of workplace strategy, the perspective of employees was sought to reveal their current and preferred working arrangements. Data was collected in the SCSi member survey and is presented in this section in aggregate given limited divergence across surveying designation. Where deviations exist, they are noted.

Within the survey, respondents were offered an opportunity to provide additional comments on a range of issues which are also presented in the analysis to follow. Whilst anonymity was guaranteed, the designation of the respondent is identified (where possible) to contextualise the commentary where quotations are presented within the analysis.

FIGURE 27: CURRENT AND PREFERRED WORKING WEEK OF EMPLOYEES.



SCSI members were asked to confirm the typical work practice by way of the number of days working in the office (or site) versus remotely (at home or in a hub). Additionally, respondents were asked to confirm their preferred workplace. A comparison of both responses is presented in **Figure 27**.

The research shows that hybrid working is currently the norm for the majority of surveying professionals (61%) across all surveying designations. It is important to highlight that the current and preferred workplace practices are broadly aligned with only a +/- 6% maximum divergence between the two, except those that are currently fully in the office. In this case, 28% of respondents work wholly in the office, with proportionately fewer (15%) identifying this as their preferred choice.

A slight variance between male and female respondents is apparent from survey data, in that fewer females (8%) prefer fully in-person (compared to the 15% average), and similarly more females (16%) prefer fully remote than the overall average (13%). The disparity is less than 7% in both instances, therefore whilst it is an interesting finding, it should be monitored over time to ascertain a trend in this regard.

Overall, the findings bode well for the previously discussed forthcoming Work Life Balance and Miscellaneous Provisions Bill 2022 given the broad alignment between current and preferred workplace practices and workplace strategy confirmed by key informants (see section 4.1).

A small number (3%) indicated that an "other" working week arrangement was in place. The reason cited was that there was no "typical" working week. The nature of the surveying profession requires on-site inspections, surveying, measurement and management which supports the suggestion that there may not be a typical working week.

Numerous respondents confirmed that they had the flexibility to work from home but choose to work in the office for specific purposes as required. This is what is known as "purpose-driven flexibility".

"No requirement for me to be in the office to carry out my duties, but it's necessary from the point of view of training, advice and decision-making within the team."

(Quantity Surveyor)

"For consistency of work, training, guidance and morale, my preference is to be in the office with flexibility as needed."

(Anon.)

The flexibility relates to where or when to work, and findings from this research reveal that:

- 70% of surveying professionals have flexibility as to where they work
- 53% of surveying professionals have flexibility as to when they work

Workplace flexibility is critically important to surveying professionals with 64% of respondents noting that organisational workplace strategy influences their choice to remain with the current employer. Within this 64%, no notable divergence from the overall sample size is evident across surveying designation, geographic location, company size or gender, with a minor increase in the proportion of these respondents that are within the 35-44-year-old age category (5% more than the overall sample).

"Flexible working has now become the norm for me and it is important to my everyday life. I would choose flexible workplace arrangements over a pay increase."

(Anon)

Interestingly 42% of overall respondents would change employers if their workplace preference was not facilitated. Of this 42%, 8% currently work fully remotely and 16% work in the office every day; but 16% stated that their preference is to work fully remotely with only 4% wishing to work in the office daily.

A range of potential benefits of hybrid work practices was presented and participants were requested to rank the benefits of greatest importance to them. In rank order of importance, the perceived benefits of hybrid working were confirmed as:

1. Flexibility to meet family or other non-work obligations
2. Less time spent commuting to work
3. Improved productivity and efficiency in carrying out work

Flexibility to obtain a greater work-life balance is the leading benefit of hybrid working practices with one respondent noting that:

"I like to keep home life and work life separate and love the interaction with people in and around the office."

(Property Surveyor)

The second most important benefit identified is the reduction of commuting.

“Commuting is a real issue in terms of stress and adding to the working day, while being in twice a week still allows for collaboration with colleagues and staying connected to the company culture.”

(Property Surveyor)

Interestingly, in the context of the increasing cost of living and continued house price inflation, the ability to live in a more affordable area received the lowest rank.

Notwithstanding the range of benefits of hybrid working, some challenges remain. Participants were presented with a range of possible challenges from which they were asked to rank the most significant. In rank order, the top three challenges were confirmed as:

1. difficulty disconnecting from work
2. reduced quality of communication with colleagues
3. difficulty staying motivated

People have an entitlement to be able to disconnect from work during non-work hours, however, it is the highest-ranked challenge identified by surveying professionals. 55% of respondents confirmed they work more hours as a result of hybrid working. This is a cause for concern given the potential for staff burnout in the medium to long term.

It was noted by 60% of respondents that the company within which they are currently working has an Employee Assistance Programme (EAP), however, only 25% have availed of the services provided.

The type and range of assistance provided remained outside the scope of the current research. In the context of ongoing personal challenges brought about by the pivot to a flexible hybrid model, every effort must be made to increase the promotion of available support mechanisms. Greater engagement with EAPs must also be encouraged to ensure worker wellbeing remains a priority whilst also improving staff motivation.

Reduced quality of communication with colleagues is the second most commonly cited downside of remote working, with many agreeing that this is a key reason why they work at least some of the time in the office. This challenge may impact future career development according to several respondents.

“Flexibility in hybrid working is affecting the career development, learning opportunities and overall personal development of young graduate employees and also affects business networking for the individual”.

(Property Surveyor)

This could potentially have serious long-term implications for the business:

“I think it is yet to be seen whether remote working in real estate will produce the right performance outcomes in terms of individuals and the overall business. It is only when the real estate business environment becomes more challenging in the coming years that will show if remote working is sustainable for business performance. The potential cost savings for companies are good, but growing turnover is the best way to positive business expansion and I am not sure that remote working will deliver that expansion consistently in the long term.”

(Property Surveyor)

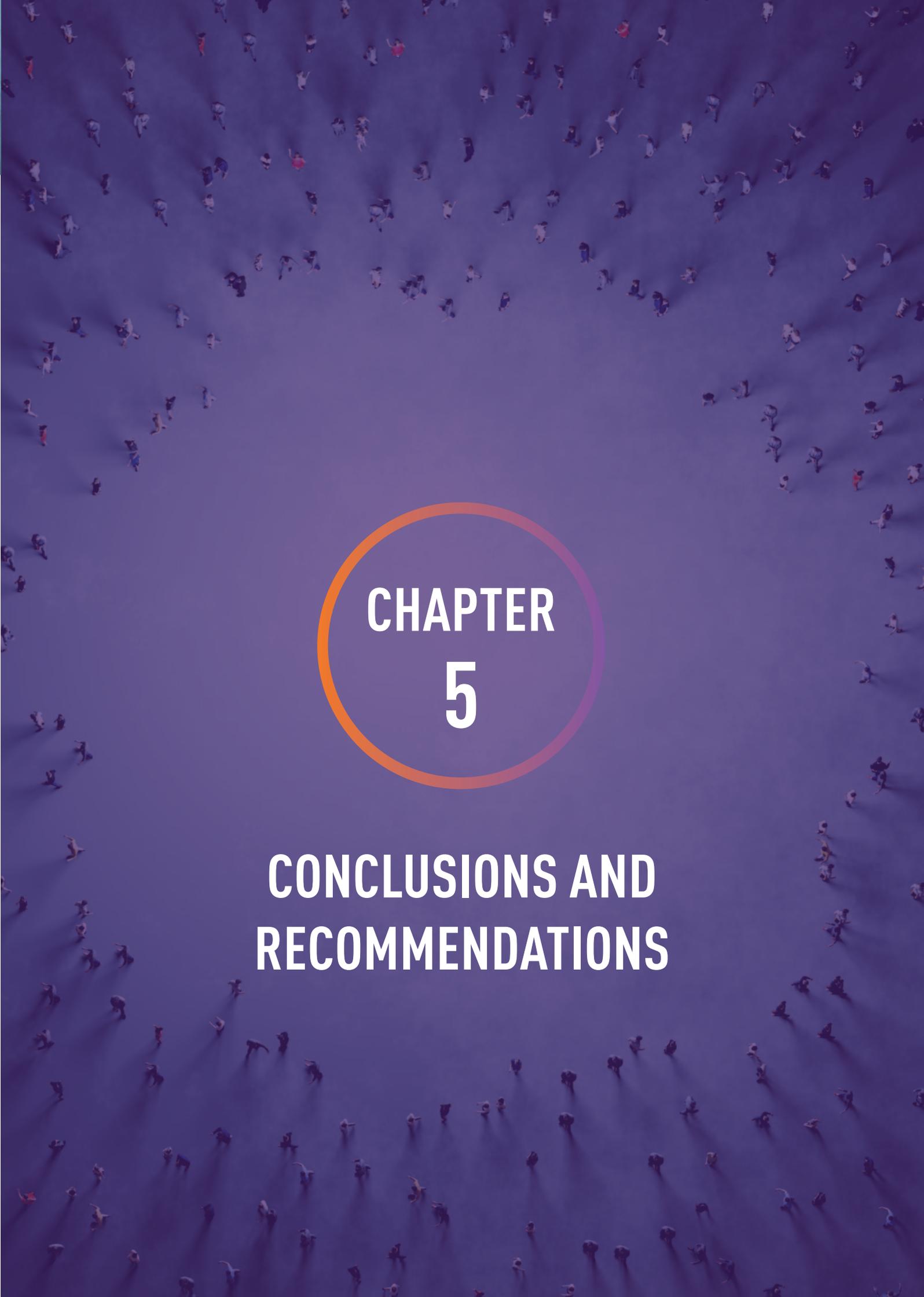
While the transition to a more flexible, hybrid workplace has considerable benefits to workers on a personal level, there remain residual issues that may require further investigation at a professional level. It is impossible in the context of this research to ascertain any correlation in this regard, however, it is something that must be monitored over time given the potential negative long-term impact on employees and businesses alike.

4.3 Conclusions

Workplace strategy is critically important in the context of a competitive market wherein staff prioritise the whole remuneration package including benefits and workplace flexibility. Findings from the research confirm that hybrid work practice is the most common across all surveying designations.

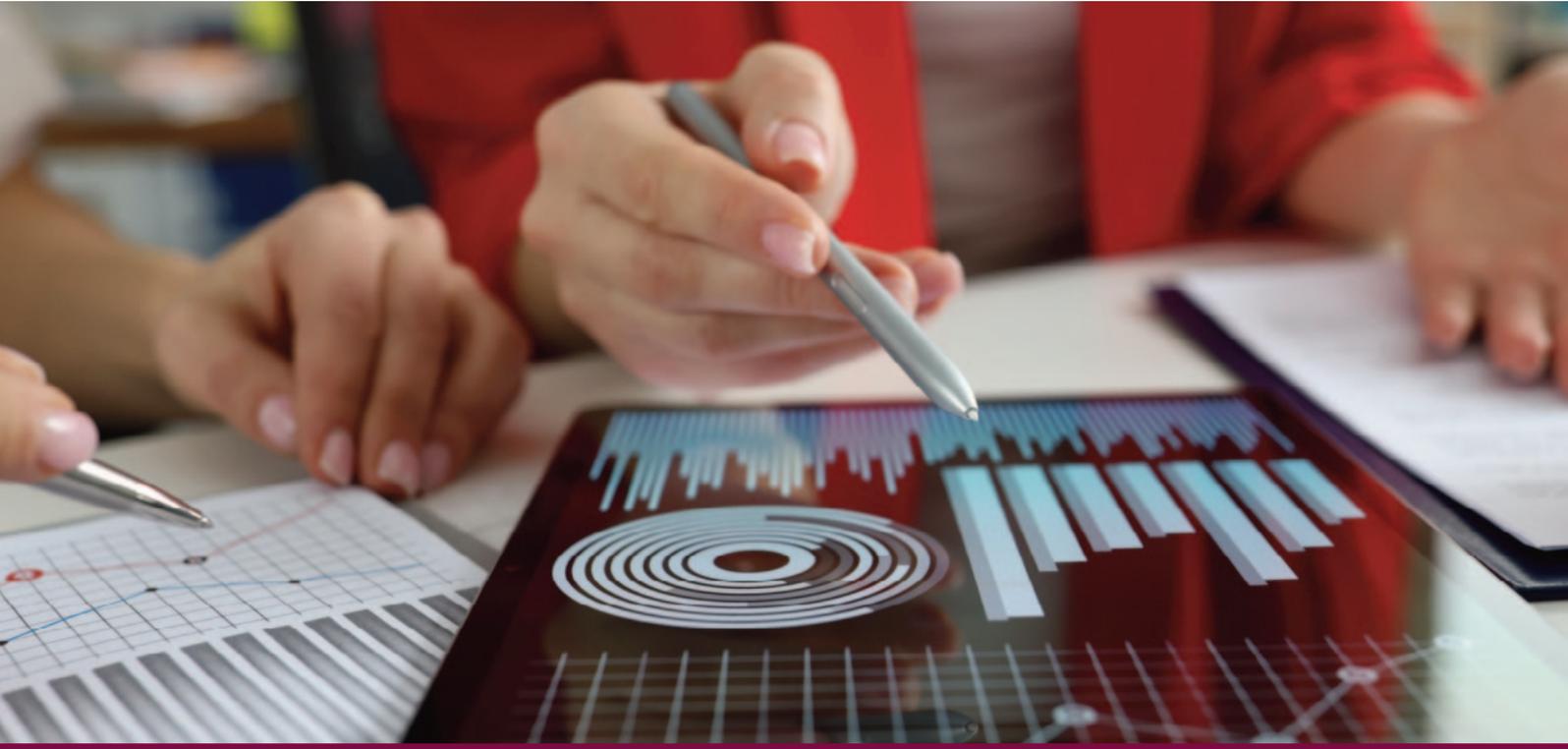
Several benefits of hybrid working were identified; however, some challenges remain relating to longer working hours, problems disconnecting from work and minimal use of existing EAPs. The research uncovered some concerns with the potential impact of hybrid work practice on career progression. This requires further detailed investigation over time.

Whilst the findings are novel in the context of the surveying profession, measurement metrics in terms of space utilisation, and types of workspace but also in terms of productivity and performance gains should be determined for ongoing monitoring.



**CHAPTER
5**

**CONCLUSIONS AND
RECOMMENDATIONS**



5. CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions

This research has been conducted during a period of considerable uncertainty in both domestic and international economies. Whilst many leading indicators such as economic growth and employment are strong, several challenges remain, namely high inflation, rising interest rates and the ongoing housing crisis.

Participants in this research are mostly optimistic about the future demand for surveyors, however, some are erring on the side of caution as regards employment growth within their organisation at present. For that reason, the projected future demand reported herein is a conservative estimate, particularly at the median and pessimistic levels. However, if growth occurs at a faster pace, the optimistic scenario may be experienced thereby generating a shortage of professionals across all surveying designations.

The surveying workforce must be monitored on an ongoing basis, particularly given the current uncertainty and the clustering of surveying with other professions in nationally available data. On the supply side, the number of enrolments on SCSi-accredited

programmes has increased since the 2018 report, particularly for QS. Future demand is forecast to emanate from both public and private sectors, particularly housing, therefore the increase in the supply of surveying professionals is a positive discovery of the research. There remains only one institution providing Building Surveying programmes which is a constraint on the supply of qualified professionals within this pathway.

Scope exists for the development of advanced and/or specialist programmes in areas wherein future demand is likely to derive, for example in relation to building energy performance, life cycle analysis and costing, smart technology and asset management.

This is particularly important in the context of achieving ambitions detailed in the NDP 2021-2030. Continued engagement with CPD is critically important to ensure surveying professionals remain up to date with industry changes and to advance the skills, knowledge and competence required to provide innovative solutions across the whole life of the built environment.

The salary earned by property, land and construction professionals has increased by 10% overall with variance noted across the three main surveying designations. The increase is marginally more pronounced outside the Dublin region.

it is important to monitor key performance data to ensure evidence-based decision-making to enhance and augment employee wellbeing, productivity and space utilisation.

Respondents to the research confirmed a preference for the flexibility that the hybrid workplace strategy allows. The majority of surveyors work on a hybrid basis and identified a range of benefits including reduced commute time and improved work-life balance.

The widespread pivot to hybrid work practice is at an early stage in the life cycle for many organisations, therefore it is important to monitor key performance data to ensure evidence-based decision-making to enhance and augment employee wellbeing, productivity and space utilisation.

5.2 Recommendations

The report provides important insight into several facets of surveying labour markets, and based upon the analysis and conclusions drawn a number of recommendations are made.

1. Employment Opportunities

- 1.1 Resulting from market uncertainty at the time of the research, it is likely that estimates of future employment demand are conservative. It is recommended that a mid-term review of additional employment demand projections be undertaken.
- 1.2 Staff retention is a challenge in a highly competitive labour market. Efforts must be made to ensure that additional jobs created are maintained throughout economic cycles. Upskilling and flexible work practices are two mechanisms addressed within this research.
- 1.3 Surveyors play a key role in the provision of a sustainable built environment and employment opportunities will be created in aspects of sustainable development in pursuit of legally binding climate targets. Professionals must develop and upskill on an ongoing basis the requisite skills and competencies to do so.
- 1.4 Consideration should be given to the development of a Surveying Workforce Monitor to monitor the demographic information of the profession (e.g. age, gender, ethnicity, education). Collating demographic information would inform decision-making relating to a range of matters including training requirements and diversity and inclusion policy.

2. Promotion of Property, Land and Construction Professions

- 2.1 The multifarious roles of surveying professionals open up a wide variety of opportunities across the built environment and other sectors, creating employment prospects throughout the economic cycle. Ongoing promotion of a wide range of career opportunities in surveying is required to ensure the continued supply of surveying professionals to mitigate against potential shortages.
- 2.2 Surveying professionals in collaboration with other stakeholders, should continue to actively advocate the importance of the surveying profession throughout the whole life of the built environment to further enhance the public profile of property, land and construction professionals.

3. Education, Training and Research

- 3.1 Access to surveying education is crucial to assist and encourage a diverse range of students. The development of a suite of surveying apprenticeships should be advanced for this purpose to ensure a variety of entry pathways to the profession.
- 3.2 Consideration should be given to the feasibility of developing a surveying student monitor to track demographic data (such as gender, age, secondary school location etc.) of students undertaking surveying programmes. This could be undertaken on an annual basis through HEIs nationwide. The data would build a profile of the future surveying labour force and potentially inform aspects requiring attention or action.
- 3.3 The development of additional pathways to a career in Building Surveying should be considered given there remains only a single provider of an academic programme for the profession in Ireland.
- 3.4 To meet the needs of employers and clients and to build expertise evolving and new facets of the sector, it is recommended that additional advanced specialised qualifications be developed. Specialisms may include those relating to smart technologies, Life Cycle Costing, Environmental Social Governance (ESG), asset management and data analytics.
- 3.5 As part of recommendation 3.4 an informed approach to the development of additional specialised qualifications is required. Stakeholder groups including surveying professionals, public and private sector clients and education providers should collaboratively undertake a needs analysis for the development of specialised programmes for surveying professionals. These programmes may range from CPD or micro-credentials up to level 9 (MSc) or level 10 (Ph.D.) on the NFQ.
- 3.6 Employers should start/continue to support staff in undertaking education and training programmes to acquire skills and expertise in evolving aspects of the profession demanded by clients. Providing or funding training for employees is known to improve employee retention and should form part of an employee's remuneration package where possible. Engagement with the SCSi CPD programme for Chartered Surveyors should also be encouraged for this purpose.
- 3.7 Guidance and training support should be provided to all SCSi members relating to the Work Life Balance and Miscellaneous Provisions Bill 2022. This could form part of the CPD Programme offered to members.

- 3.8 The rapidly changing global business environment coupled with the continuing aggregation of surveying with other professions in the nationally available data, give rise to the need for applied research to be undertaken, of and for, the surveying profession. Evidence-based research is a necessity for the development of innovative solutions to solve complex challenges in the built environment.

4. Workplace

- 4.1 It is recommended that all employers continue to monitor employee workplace preferences to ensure their preferences are aligned with company policy in this regard.
- 4.2 Flexible work practices are the new norm; therefore, accurate and timely occupancy data for office utilisation must be collected to ensure space optimisation, improve employee experience and potential cost savings. Measurement metrics for space utilisation, types of workspace and productivity and performance gains should be developed for this purpose.
- 4.3 Based upon space utilisation and workspace data collected, reconfiguration of office space may be required. Should this be the case, it may perhaps be used as an opportunity to make energy improvements and augment the ESG credentials of the building.
- 4.4 The research uncovered a potential downside impact of flexible, hybrid working on career progression opportunities. The investigation of this possible relationship lies outside the scope of this research and is arguably too soon to measure at present, but is a facet of workplace strategy that requires investigation going forward.
- 4.5 It is recommended that a surveying employee well-being monitor be established in line with the Government of Ireland Well-being Framework (with dimensions including person, place and society). This is particularly pertinent in light of the inclusion of the right to request remote work for all workers being introduced through the Work-Life Balance and Miscellaneous Provisions Bill 2022.
- 4.6 The promotion of Employee Assistance Schemes is recommended given the current low uptake of these initiatives. This is particularly important in the context of addressing the confirmed challenges associated with hybrid working.

ABOUT THE AUTHOR

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Having completed her primary degree in Economics and History from UCD, she was subsequently awarded an MBS from UCD Michael Smurfit Graduate Business School and an MSc Strategic Focus from Edinburgh Business School, Heriot-Watt University. Róisín went on to complete a Doctor of Business Administration (DBA) degree, with research focusing on Strategic Planning in Irish Quantity Surveying Practices, awarded by Edinburgh Business School, Heriot-Watt University.

Róisín is the lead author of numerous internationally peer-reviewed research publications and industry reports across many facets of the built environment, including labour market analysis and strategic planning.

She is the lead author of the “Employment Opportunities and Future Skills Requirements for Surveying Professionals” reports (2014 and 2018) and the author of the recent SCSI-commissioned report “Sustainable Development in the Surveying Profession”.

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APPENDICES

Appendix 1: SCSI-Accredited and Recognised Programmes.

Institution	Accredited Programme(s)
ATU Galway	BSc Construction and Quantity Surveying
ATU Letterkenny	BSc Quantity Surveying
ATU Sligo	Higher Certificate in Property Services & Facilities, BSc Construction Project Management, BSc Quantity Surveying, Postgraduate Cert M&E for QS
Dundalk IT	BSc Building Surveying, Postgraduate Diploma and MSc Building Surveying
Maynooth University	MSc in GIS and Remote Sensing
MTU Cork	BSc Quantity Surveying, MSc Construction Project Management
SETU Carlow	BSc Quantity Surveying
SETU Waterford	BSc Quantity Surveying, MSc Construction Project Management
TUS Athlone	BSc (Hons) Quantity Surveying
TUS Midwest Campus, Limerick	Higher Certificate in Property Valuation & Management, BSc (Hons) Property Valuation & Management, BSc (Hons) Quantity Surveying, MSc Quantity Surveying
TU Dublin	BSc (Hons) Construction Management, BSc (Hons) Geomatics, BSc (Hons) Property Economics, BSc (Hons) Quantity Surveying, MSc Geospatial Engineering, MSc GIS, MSc Real Estate, MSc Spatial Planning, MSc Quantity Surveying



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