

The 2021 State of AEC Project Management Research Report

ARUP

 Mail Manager

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Researched and written by Mail Manager, part of the Arup Group

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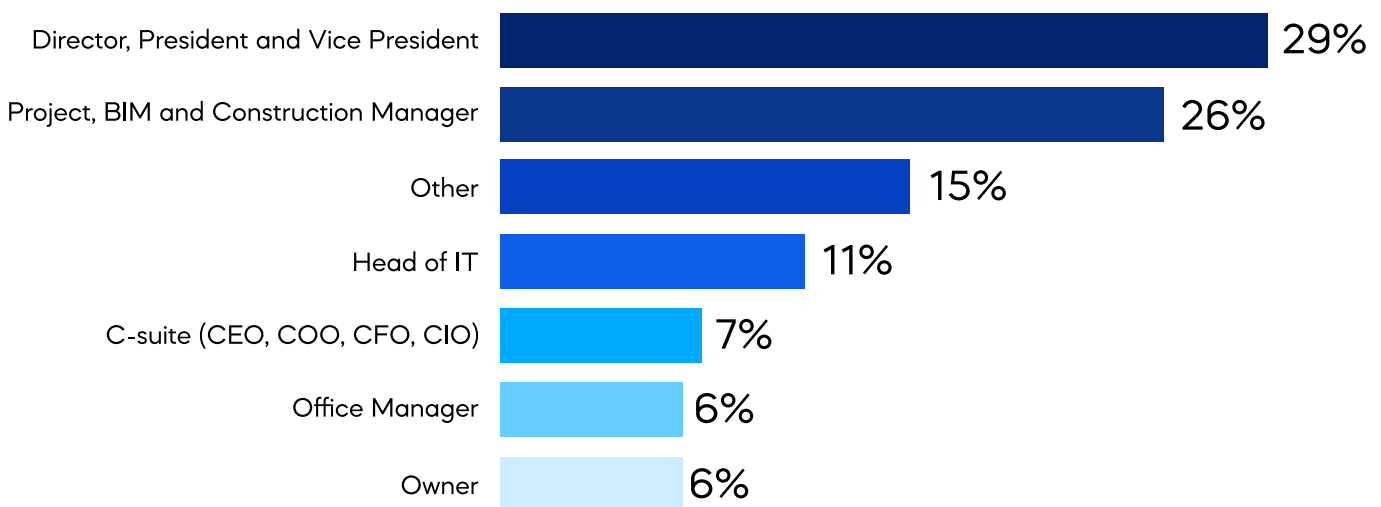
Published February 2021

Introduction

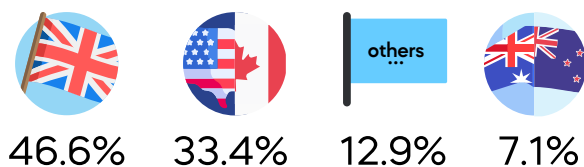
This research by Mail Manager, part of the Arup Group, aims to discover the project management and collaboration challenges facing businesses in the architecture, engineering and construction (AEC) industries. The report explores how businesses manage project information, where they store it, and how they go about retrieving data to chase payments and when facing legal disputes. The report also provides insight into how the COVID-19 pandemic has affected organisations' project management processes.

The research surveyed 517 AEC leaders from businesses in the United Kingdom and the United States. All respondents hold leadership and management roles at their businesses, including CEOs, CFOS, CCOs, Directors and Owners, as well as BIM Managers, Project Managers, Heads of IT and IT Managers. The anonymous responses were collected in January 2021.

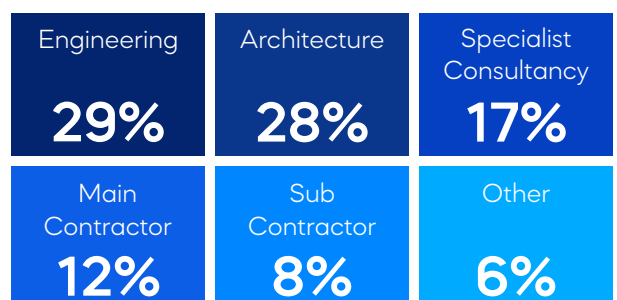
Job title



Country



Type of organisation



Executive Summary

The key takeaway from the research was that facilitating remote working has become AEC organisations' number one priority. This time last year, remote working was barely a consideration for many businesses, but the COVID-19 pandemic situation has drastically changed their objectives. In these unprecedented times, the AEC industry has a crucial role to play in sustaining critical infrastructure, building hospitals, and more.

Despite the changes in the world, email remains easily the most used project correspondence tool. However, the research finds many AEC organisations still struggle to access the information they need when they need it. The retrieval of project information, the vast majority of which resides in email inboxes, is a major challenge for the AEC industry that's only increasing due to the pandemic and as businesses prioritise remote working.

“

The world has changed dramatically in the last 12 months and that's reflected in the AEC industry's changing priorities. A shift in focus to remote working increases the need for effective collaboration tools. However, our research finds the vast majority of project correspondence continues to remain in email inboxes, which makes it difficult for people to quickly discover and retrieve historic project data as and when they need it. This is a major concern as the majority of project scope changes reside in email inboxes, employees increasingly find they need to retrieve emails from past projects, and with people working remotely.

Jacob Wardrop, Director at Mail Manager

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Key findings

Remote working suddenly becomes a key priority

This time last year, just 11% of AEC companies considered remote working a key technology initiative. 12 months later, a huge 71% of these organizations consider it their number one priority.



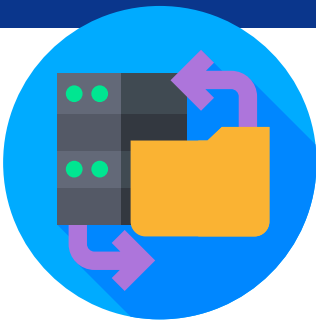
Email is crucial to project correspondence

Email remains the most-used collaboration tool for project correspondence. More than three-quarters of respondents use email for at least 70% of communication about their projects. Furthermore, more than half of the respondents (55%) use email for at least 80% of their project correspondence, and over one quarter (26%) use email for at least 91% of their project correspondence. Email is also particularly important to project scope changes, with 52% of this information sitting in email and 39% residing within formal documents.



Key findings

Project information availability concerns as discovery needs increase



The majority of correspondents (87%) are at least 'slightly concerned' about their project information not being readily available and visible. Over half the respondents (55%) are either 'concerned' or 'very concerned' about not being able to discover project information. These concerns are highlighted by people increasingly having to find information from past projects. One in five respondents (19%) said they 'very often' have to find information from historic projects, which was a 33% increase from last year's research. There was also a 17% decrease in respondents who said they 'never' or 'don't often' have to find information from old projects.

COVID has made email and collaboration more important

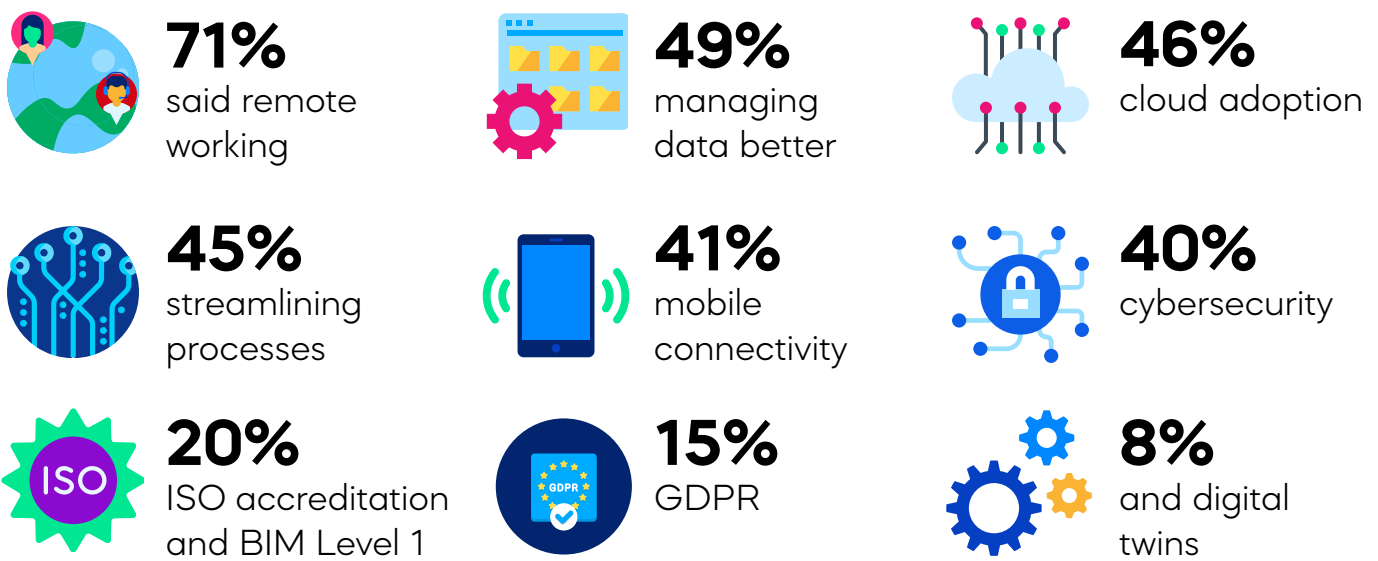


The COVID-19 pandemic has seen email become even more important to AEC organisations. Four in five respondents (80%) said their use of email had increased at least 'somewhat' since the beginning of the pandemic. Furthermore, 85% of respondents believe that collaboration tools generally, also including BIM, financial software and internal and external software, have become more important during the pandemic.

Full Research Findings

Remote working is businesses' top tech priority

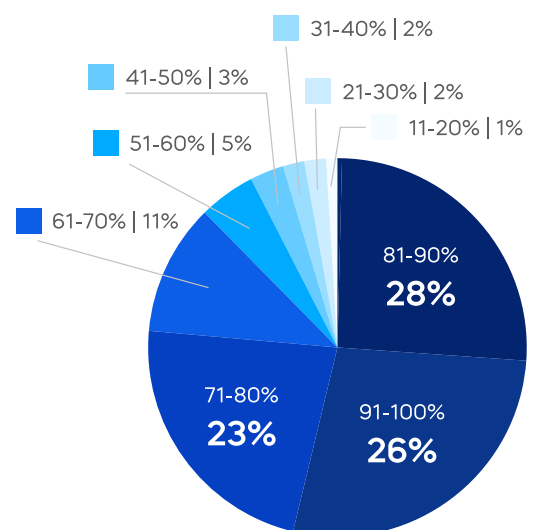
Enabling employees to work efficiently and securely from home topped respondents' technology initiatives. When asked which technology they were considering,



This was in stark contrast to the 2020 research, when remote working was considered a key priority by just 11% of respondents. 12 months ago, streamlining processes was businesses' top priority, followed by cloud adoption, managing data better and cybersecurity.

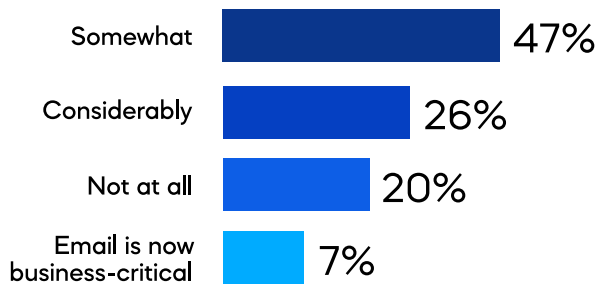
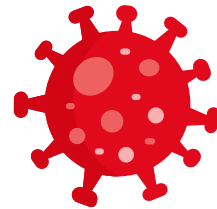
Email is the most-used project communication tool

Email remains the most-used tool for project correspondence. 26% of respondents use email for at least 91% of their project correspondence, 28% use it for 81-90%, and 23% use it for between 71-80% of their project correspondence. 11% of respondents use email for between 61-70% of their project correspondence, and just 13% use the tool for 60% or less of their project communication.



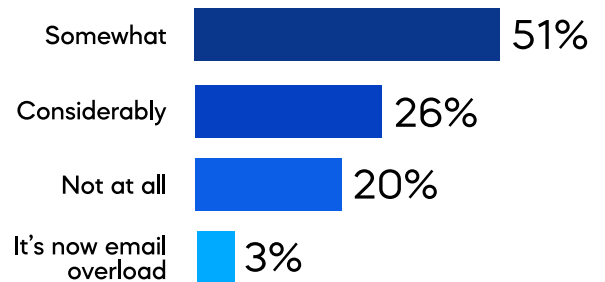
Full Research Findings

Email and collaboration increase in importance during COVID

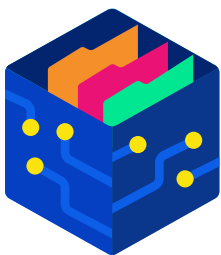


The COVID-19 pandemic has had a major impact on the importance of email for ACE firms' email usage. Nearly half of the respondents (47%) reported seeing 'somewhat' of an increase in the importance of email over the last year. More than one-quarter of respondents (26%) said they'd seen a 'considerable' increase in the importance of email and 7% said email was now business-critical.

The research also found that email volumes are on the increase since the outbreak of COVID-19. Just over half of the respondents (51%) said their email volume had increased 'somewhat' and more than a quarter (26%) said it had increased 'considerably' since the pandemic. Only one in five respondents (20%) said their email volume hadn't changed in the last year, while 3% said they were now suffering email overload.



Respondents told us that collaboration tools, in general, have become more important to their business since the COVID-19 pandemic. In particular, 55% of respondents said internal collaboration tools and software have become more important. Nearly one-third (30%) said external collaboration tools were now more important and others were now more reliant on BIM tools (6%) and financial software (3%).



6%
said they are more
reliant on BIM tools

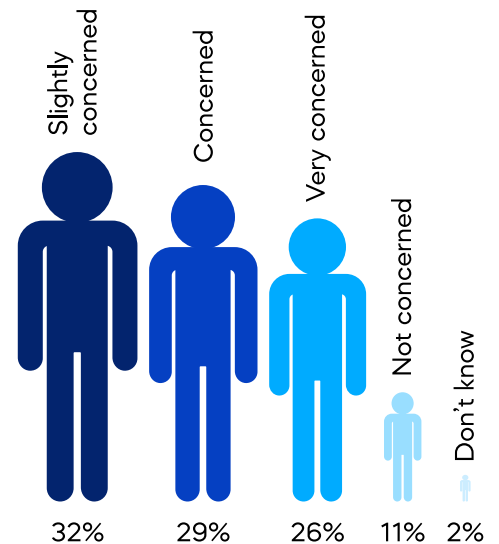


3%
are more reliant on
financial softwares

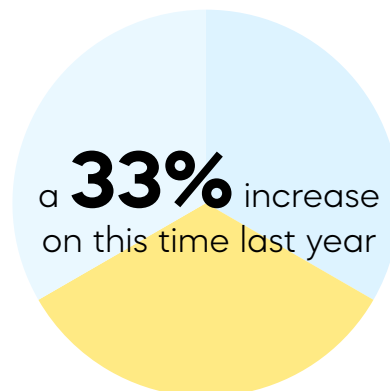
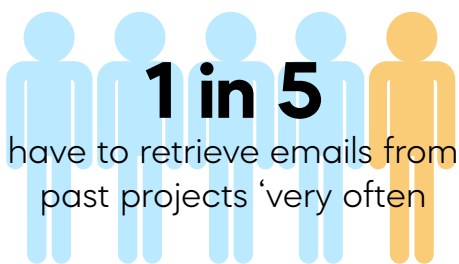
Full Research Findings

Project information availability and visibility concerns

Businesses are concerned about their vital project information not being readily available and visible when they need to access it. 26% of respondents said they were 'very concerned' that project information wouldn't be readily available or visible. A further 29% said they were 'concerned' and nearly one-third of respondents (32%) said they were 'slightly concerned' about project information not being available or visible when they needed it.



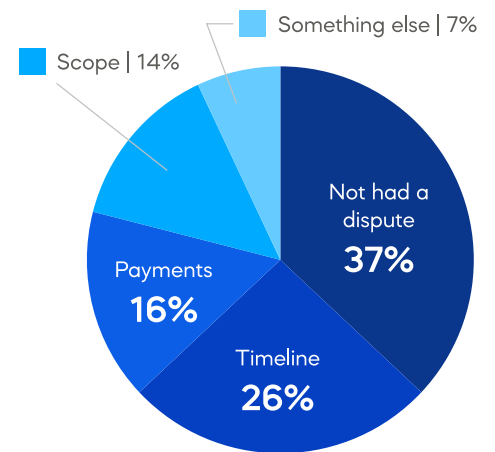
In addition, being able to discover emails from previous projects is becoming increasingly important to businesses. Nearly one in five respondents (19%) said they have to retrieve emails from past projects 'very often,' which was a 33% increase on this time last year. Nearly half of respondents (46%) 'often' have to find emails from old projects.



Full Research Findings

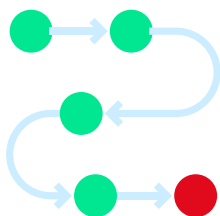
Disputes have been rife during COVID

Contractual disputes have increased during the pandemic, which has seen a slowdown in the economy and lower construction activity on top of the impact of Brexit, the ending of government support schemes and the reverse-charge VAT for British companies. However, businesses expect contractors to have plans in place to mitigate the cost and time impacts caused by COVID. As a result, two-thirds of AEC firms surveyed (63%) said they had some form of dispute since the COVID-19 pandemic. Of those, the main dispute was around timelines (26%), followed by payments (16%) and scope (14%).



The research found that 'evidence of correspondence relating to the scope and agreements of the project' is the information most commonly required to fight a legal dispute, with 80% of respondents advising they'd need to retrieve it to evidence their case. That was followed by contracts (65%), historic project information (59%), drawing approvals (54%), information of people who've left the business (35%) and sensitive financial documents (23%).

When asked about the most common problems when chasing payments, nearly one-quarter of respondents (24%) blamed principal contractors' internal processes. Other common issues were the need to reproduce information (21%) and scope disagreements (18%).



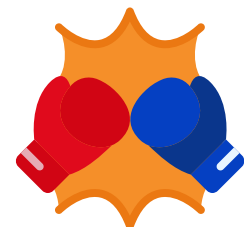
24%

blamed principal contractors' internal processes



21%

need to reproduce information



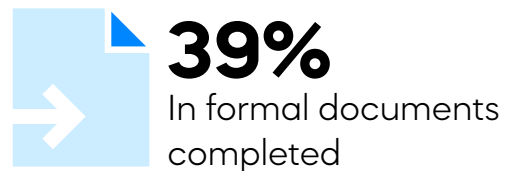
18%

scope disagreements

Full Research Findings

Project scope changes increasingly sit in email

Over half of the respondents (52%) said information relating to scope changes resided in their email inboxes. That's a slight increase from last year, when 50.1% of scope change information was in email. Formal documents (39%) were the second-most popular place for scope change information to reside. Only 4% of project scope change information resides in project managers' heads and only 1% isn't in digital spaces.



Businesses put data discovery at risk by not filing outgoing employees' emails

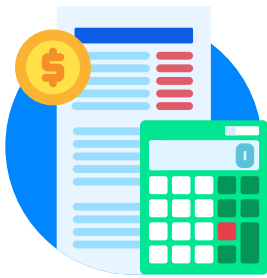
A major issue around discovering historic project information is email residing in the inboxes of ex-employees. Avoiding this is reliant on filing departing employees' emails before they leave the company. However, only 52% of respondents said they do file outgoing employees' emails, while nearly one-third (32%) said they don't and 17% didn't know.



Full Research Findings

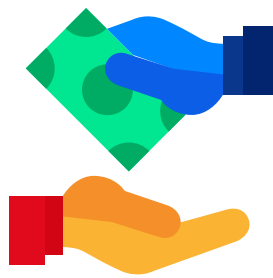
IT budgets are slightly on the increase

When asked about their IT budget fluctuation, 43% of respondents said that it was increasing. Half of the respondents (51%) said theirs was staying the same and just 6% said IT budgets were decreasing.



43%

said that it was increasing



51%

said theirs was staying the same



6%

said IT budgets were decreasing.

Methodology

We surveyed 517 respondents on their opinions around project management processes, email and document management challenges, and information storage and retrieval. The respondents all held leadership and management roles at AEC organisations in the EMEA, North America, and APAC regions, with the majority of respondents coming from the UK and the US. All answers were anonymous and were compiled in January 2021.

Conclusion

Mail Manager's research makes it clear that the COVID-19 pandemic has had a significant impact on how AEC organisations work. Facilitating remote working has suddenly become a key priority, while email volumes and the need for collaboration tools have increased in the last 12 months. However, legal disputes and employee concerns over a lack of information visibility are on the rise as businesses continue to deploy tools that don't allow them to find the documents and information quickly and efficiently.



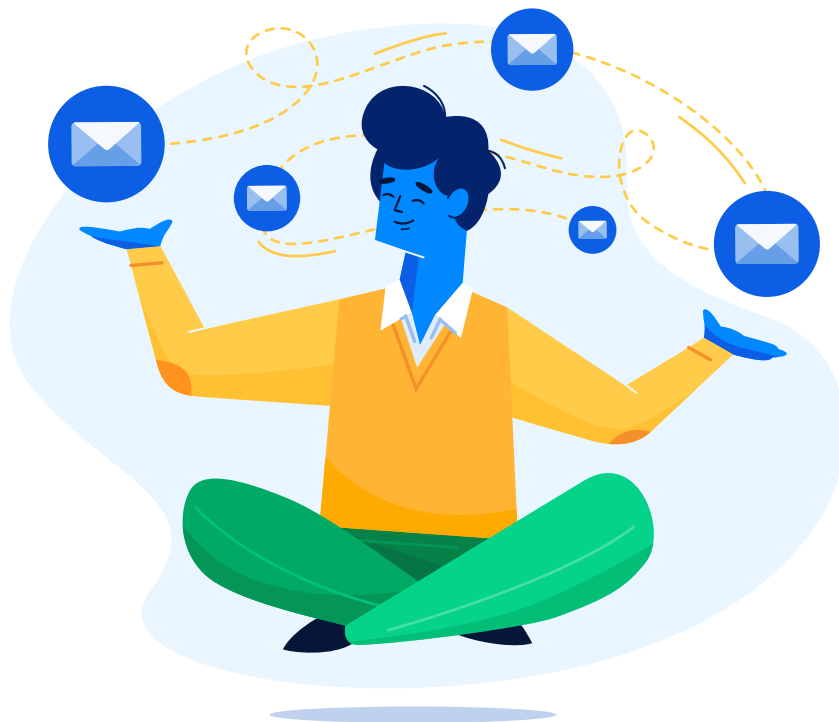
“This insight from senior figures in the AEC industry shows that the pandemic has had a dramatic effect on the way that businesses work. With employees continuing to remain home-based, email remains a vital collaboration tool that businesses still struggle to get the best out of. This means important project information gets locked in email inboxes, employees spend hours looking for data and documents, or information goes missing completely. The increasing importance of remote working and the need to quickly discover historical email data means organisations need to invest in tools that simplify the process and help employees be as productive as possible.”

Jacob Wardrop, Director at Mail Manager

About Mail Manager

Mail Manager is a leading email management solution developed by Arup. Mail Manager works with more than 2,500 architecture, engineering and construction businesses in 16 countries, with more than 70,000 employees benefiting from its powerful filing and search capabilities. For more information, visit www.mailmanager.com.

To book a personalised demo of Mail Manager, or if you have any questions, contact sales@mailmanager.com.



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