THE IMAGE OF CONSTRUCTION AND ITS INFLUENCE UPON CLIENTS, PARTICIPANTS, AND CONSUMERS

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Construction is recognised as the most visible of industries as it conducts its affairs and delivers its processes largely within the public domain, and exposes its products to public examination for many years after. The industry has enormous social and economic impact yet appears to project an image which is often less than positive and which influences the sponsorship behaviour and commercial relationships entered into by clients. The result may be that the perceived image of the industry held by individuals or organisations is having a negative effect upon the ability of the industry to promote itself as a highly efficient and versatile operation conducted with considerable skill and expertise and requiring the application of a diverse range of technologies. This paper develops and extends earlier work by the author (Baldry 1997) which considered the life cycle of the construction process as the determinant of the perceived image of the industry, its effect upon the behaviour of participants, and its influence upon the response of the marketplace. A postal survey is described which was undertaken to elicit the views of sponsors of construction activities, construction professionals, and constructors, on a range of topics pertinent to the image which is generated of the industry and their effect upon commercial and ethical relationships. The paper proceeds to interpret the views expressed and seeks to identify those factors which the industry needs to address if it is to promote consumer confidence and enhance the ethical performance of its participants.

Keywords: construction professionals, contractor, image, sponsors.

BACKGROUND

The performance of the industry projects a continuously changing and developing image of itself which stimulates a response from consumers in the marketplace and directly influences the behaviour and conduct of those who participate in its activities. This image of the industry was considered important enough to be the subject of a specific working group of the Construction Industry Board, Working Group 7, which was established in the wake of the Latham Report (Latham 1994) to "*identify and recommend how the image of the construction industry can be improved and investment encouraged; also to establish targets and to set key milestones to measure performance and progress*" (Construction Industry Board 1996).

The commonly held perception of the image of the industry may be identified (Baldry 1997) as one that is:

- the provider of an unsatisfactory product rarely delivered on time, with limited after-care services, and resulting in excessive and unanticipated costs to consumers
- the employer of a disreputable, male-dominated workforce which demonstrates unreliability, low productivity, and limited skill and competence

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- the operator of outmoded practices utilising low technology to limited effect
- the context for corrupt practices which defraud clients and tax-raising authorities
- the source of disturbance to everyday personal or corporate lifestyles
- the plunderer of resources and the despoiler of open countryside and amenity
- the vehicle for unsatisfactory career prospects and excessive employment demands

The report by CIB Working Group 7 was designed to lead the implementation of a strategy to improve the image of the industry by the development of a set of core initiatives to be employed as the campaign evolved. Whilst these aims are clearly worthy and important to the industry it was this author's view that research was needed to establish the significance and characteristics of some of the key determinants of the image of the industry, as perceived by three major groups of participants in the activities of the industry, that is clients, construction professionals, and contractors.

STRUCTURE OF THE STUDY

In order to elicit some indicators of opinion of those who participate in or are the consumers of construction services regarding the image of the industry and its effects, a postal survey was undertaken as a means of gathering a substantial body of data. The content of the questionnaire was established to seek responses concerning the perceptions held of a number of image-forming issues. The structure of the survey questionnaire largely required the respondents to express their views on the issues presented. In certain cases the respondents were asked to indicate their impression of the view they believed to be held by members of the other sectors taking part in the study to permit some form of comparative study to be undertaken and to assess the degree to which respondents perceptions of the views held by others actually matched those views.

A total of 120 questionnaires were issued and a response rate of 26% achieved, the greater level of response being from contractors. This level of response received was somewhat disappointing and therefore any inferences drawn from the data can only be made in generalised terms. However it is concluded that the data does offer some useful insights into the attitudes prevailing in the different sectors of the industry.

OUTCOMES OF THE SURVEY

(i) Overall perception of the image of the construction industry

The construction industry process is an amalgam of a range of design, procurement, and execution activities which are sampled in a variety of forms and contexts which become assembled in the consciousness of a recipient and construct into a powerful image of the industry. Not only is the image perceived by these clients important, of equal significance is how participants drawn from the supply side of the construction process anticipate and attribute these perceptions held by clients, and the degree of coincidence of perceptions which occurs.

The outcomes from the survey were summarised as:

- Clients identified the industry as being reasonably effective and productive
- Clients believed that contractors and professionals held a more positive view of the industry than they did

- Professionals also identified the industry as reasonably efficient and productive
- Professionals believed that clients held the same view as themselves but perceived contractors to hold a more positive view
- Contractors also believed the industry to be reasonably effective and productive
- Contractors believed that professionals held a similar view to themselves but that clients had a more negative impression

It was significant that there was a fairly consistent and reasonably positive perception of the image of the industry amongst all sectors although some dissonance was noted of how one sector presumed the views of the others. In relative terms the consensus view of the industry is that it is reasonably effective and productive, which may be reinterpreted as being only “average”, although some significant clients do adopt a critical position (Lynn 1996).

(ii) Sources of perception of the image of the construction industry

It is proposed that actual or potential sponsors of construction activity have assembled an image of the construction industry which in some way may influence their behaviour as clients, possibly to the disadvantage of the industry. Significant therefore is the source or sources from which this image is derived and it is vital for the industry to be able to identify which phases or aspects of its activities have the most powerful affect upon clients.

The outcomes from the survey were summarised as:

- Clients had mainly derived their perception of the image of the industry from first hand experience as corporate sponsors of construction, and to a lesser degree from observation of construction activity
- Clients indicated that they were not influenced by press or other media reporting
- Professionals believed clients derived their image of the industry from a number of influences, including first hand experience, the experiences of others of their acquaintance, from observation of construction, and from press reporting
- Contractors also believed that clients were influenced by the same factors identified by professionals although they placed less significance upon media sources
- Clients were of the view that the portrayal of the industry in the press and other media was, for the most part, occasionally inaccurate
- Both professionals and contractors held the view that media reporting was either occasionally or consistently inaccurate
- There was negligible support of the view from any sector that the image of the industry was grossly distorted by the media

It was notable that clients clearly expressed that the most influential impression of the construction industry was drawn from their own first hand direct experience as construction sponsors, and significantly less from secondary sources such as the experiences of others or media reporting. This was significant as this position was less readily anticipated by the professional or construction sectors who attributed the influences as arising from a range of sources. Furthermore clients were more confident as to the reliability and accuracy of media reporting of the industry than were the other sectors who perceived a more consistent frequency of inaccuracy and misreporting. Clearly therefore the impact on clients of media reporting and its accuracy is less significant than suppliers of construction services believe and that the direct experience as a construction sponsor evaluating actual performance is significantly more powerful.

(iii) The behaviour of sponsors of construction activities

A construction sponsor is seeking access to a mix of managed resources to meet a particular need. Investment in construction is invariably substantial on a corporate, organisational. or personal scale, and demands not only the commitment of financial resources but also managerial time, the risk of interruption to everyday business processes, and exposure to the commercial risk inherent in contracting activity. It is imperative that the industry is aware of the level of confidence displayed by clients and how this affects their sponsorship decisions. Where clients are deterred from sponsorship the facets of the construction process which have influenced their choices need to be identified and examined.

The outcomes from the survey were summarised as:

- Clients largely responded that their perceived image of the industry had little or no effect upon their construction sponsorship behaviour
- Professionals were of the view that clients, whether they held a negative or positive view, always demonstrated a wariness in their dealings with the industry
- Contractors held a strong view that the majority of clients had a negative perception and that this made them highly wary in their dealings with the industry
- Those features of construction activity which deterred clients from sponsoring construction activity with confidence were the absence of post-completion support, the culture of conflict, and uncertainty over time, cost, and quality standards
- Professionals believed that clients were deterred by time, cost, and quality standards, and significantly by the prospects of disruption caused by construction
- Contractors held a similar view to professionals but also recognised client reservations over the culture of conflict and post completion support

Construction clients clearly asserted that their construction sponsorship behaviour was unrelated to their perception of the image and capability of the industry and was driven by the need to build to meet operational requirements. The factors which acted as a deterrent to some clients were associated with the time, cost, and quality aspects of the construction process as well as the adversarial characteristics which they perceived as an inevitable feature of construction activity. The expectations of professionals and contractors generally concurred with these factors although both these sectors believed that disruption to everyday activities would be a significant deterrent to clients, a factor which was not noted by client respondents at all. It could be that clients are more resigned and accepting of the disruption caused by construction practices than suppliers to the industry expect or presume, and that it is the actual performance characteristics of the work in progress and on completion which matters most greatly. Of particular note is the significant reference made to the delivery of post-completion support from the industry, an area in which it has been historically deficient and to which clearly it must pay attention.

(iv) Ethical standards of the industry

The commercial relationships which are required to subsist between construction sponsor and supplier are complex and cumbersome, providing opportunities for either side to potentially exploit less than equitable or balanced terms, or to exercise dominance over the contracting partner where an inequality of status, resources, or awareness exists. A constructive commercial relationship depends to a significant degree on the level of ethical behaviour demonstrated by each party, particularly in the case of construction with its implicit characteristics of the application of novel solutions and techniques, the high element of technical uncertainty, and the uncontrollable vagaries of the production context.

The outcomes from the survey were summarised as:

- Clients were generally of the view that the construction industry held similar ethical standards to other industries
- Clients were of the opinion that both professionals and contractors held the same perceptions as themselves as to the ethical standards of the industry
- Professionals held a widely distributed set of perceptions of ethical standards practised within the industry
- Professionals believed that contractors were of the view that the industry held comparable ethical standards to other industries but that a significant body of clients considered the industry to be less ethical
- Contractors confirmed their view that the industry held comparable ethical standards to other industries
- Contractors were of the view that both clients and professionals held a similar or more negative perception of the ethical standards practised
- Clients expressed a strong view that their approach to commercial relationships with the construction was the same as they practised in all their other activities
- Professionals were strongly divided in their view, as many respondents believing that client commercial behaviour was unaffected as those who believed that clients were notably more cautious when dealing with the construction industry
- Contractors held a particularly negative view of client commercial behaviour, believing that clients were largely more cautions when dealing with the industry other than with those whom they had established a trusting relationship

Despite the popular image of the industry as being the setting for a variety of unprincipled and unethical, if not illegal, practices it must be a matter of some satisfaction that the client perception of the standards exercised by members of the industry is that they are comparable with other large manufacturing or service industries with whom they have commercial dealings. This is clearly a relative rather than an absolute value but it is significant that clients hold the industry in much higher regard in this respect than is presumed by professionals or contractors. Clients then proceeded to reaffirm that any negative perceptions they did hold over ethical conduct did not affect their approach to contractual relationships. Again the suppliers of the industry presumed that the negative perceptions held by clients would make them more wary of commercial relationships because of reservations over ethical conduct than was actually the case. Notably contractors were of the view that a relationship of trust between client and supplier had to be cultivated over time, implying that suppliers presumed they faced an initial confidence hurdle which had to be overcome.

(v) Application of technology by the industry

To informed observers the diversity of the construction industry results in the application of a variety of production techniques and methods to meet the requirements of a technical problem. Some technical solutions are skill-intensive manual methods requiring a high level of craft skill conducted as they have for many generations, others are the complex assembly of multi-component elements or sensitive service systems, whilst others are the application of human strength to execute a low skill task.

The outcomes from the survey were summarised as:

- There was a consistent demonstration of perception from all sectors to this issue
- No respondents recognised the industry as one which applied the latest technical and scientific developments to complex problems
- The majority of respondents believed that the industry was capable of applying the appropriate technical solution to a construction problem, whether that solution be of a manual craft or technological nature
- Of the three sectors it was the contractors who demonstrated a stronger belief that the industry was dominated by traditional practices, some of which were outdated and failed to meet the requirements of contemporary buildings

Although not identified as a high technology industry there was a clear belief that construction was capable of matching an appropriate solution to a problem and that the range of techniques employed represented the diversity of the workload of the industry. It is notable, however, that it was the contractor sector which demonstrated the greatest degree of criticism of technical standards, possibly reflecting a belief that there are a host of techniques and applications which contractors desire to see imported into the construction process to improve productivity and quality.

(vi) Environmental responsibility demonstrated by the industry

All construction activity must have some impact on the environment, this impact being more likely to be detrimental rather than enhancing. The use and abuse of material resources, including land, is a highly visible manifestation of the management skills exercised within the industry. The rising influence of environmental lobbyists and the growing expectations of a more enlightened workplace is placing demands upon the industry to introduce practices which are supportable of sustainable production (Vale and Vale 1993).

The outcomes from the survey were summarised as:

- The majority of respondents reported a similar perception of this issue
- There was no support to the proposition that the industry was promoting a high degree of environmental stewardship using well researched practices and techniques
- The majority of respondents from all sectors believed that the industry was inconsistent and varied in its approach to environmental responsibility, providing examples of both excellent and very poor practice

Contractors provided the most pessimistic response with a greater proportion of respondents having the view that the industry demonstrated a limited degree of environmental responsibility other than compliance with legal obligations. The response to this issue highlighted the erratic performance of the industry in this increasingly important aspect of the construction process. Clearly the industry is perceived as having the capability to deliver construction services in a highly sustainable manner although this ability is not widespread amongst all practitioners. Just as for technical competence it was the contractor sector which was most critical, again possibly demonstrating an awareness that the expertise and methods to practice effective environmental stewardship are available but need wider diffusion into the construction process.

(vii) Impact of construction marketing

The marketing and promotion of construction services operates at a number of levels, primarily at supply organisation level in its many guises, and to a much lesser degree at an industry wide level. The marketing of the industry becomes the nett sum of the marketing efforts of many organisations in which a form of inverse synergy occurs as counterclaims, internal conflict, and “knocking” campaigns have a mutually cancelling effect. Marketing has been recognised as a process which represents “the collective attitudes of management to markets as well as the operation itself” (NEDO 1971) and therefore presents the cultural and ethical face of the industry, thereby contributing to the reinforcement of a particular image.

It may be argued that the aggregate of negative perceptions outweighs the impact of justifiable and legitimate benefits derived from construction activity, resulting in the industry occupying a negative image situation. To help to counteract this, firstly the Building Towards 2001 Report (NCG/CSSC/BEC 1990), and more recently, the report of the Construction Industry Board Working Group 7 (Construction Industry Board 1996) proposed a range of initiatives to promote a more positive public image of construction..

The outcomes from the survey were summarised as:

- There was only limited consistency of response between the sectors over this issue
- Clients placed greater emphasis upon the effectiveness of marketing efforts by individual contractors than any other source
- Professionals and contractors were more convinced that a greater degree of effectiveness was achieved by a whole industry marketing service
- Only contractors ascribed any value to marketing efforts from contractors associations or professional institutions
- There was limited support to the proposition that construction marketing had no effect
- The majority of respondents believed that the promotion of a positive image would be most effective if conducted by a whole industry promotional organisation
- There was some degree of support to initiatives such as Site Open Days and Considerate Contractors Schemes
- There was almost no support for initiatives such as a National Construction Week and Regional Construction Centres, or the adoption of the title “Constructor”

The most notable outcome from this part of the survey was the apparent absence of concordance between clients and suppliers, in the form of contractors and professionals, over the methods which are most effective in promoting construction services. Clients clearly identified the greater impact achieved by a targeted marketing approach by individual contractors than the preference shown by suppliers for a whole industry campaign. However the whole industry approach was recognised by almost all as being effective in the cultivation of a more positive image for the industry which may provide long term benefits, whereas the individual contractor to client marketing approach may be more likely to achieve a more immediate commercial relationship. There was a variety of level of responses to some of the initiatives proposed by the Construction Industry Board WG7, some proposals receiving strong support as worthwhile ventures, others being seen as having limited image-enhancing prospects.

(viii) Entry into the industry

The recruitment of high calibre entrants to the industry is a significant challenge as the degree of attraction of the industry as a career destination may be traced directly to the image presented as well as the influence of first hand experiences of participants in the process. The popular wisdom is that the negative image of the industry is a deterrent to the recruitment of individuals of high academic achievement onto professional or managerial career paths. Respondents were invited to indicate whether they would encourage a young person of their acquaintance to enter the industry on a professional or managerial career path.

The outcomes from the survey were summarised as:

- There was an equal majority support in all sectors to the encouragement of a young person to enter a professional and managerial career in the construction industry
- Those who agreed identified strongly that the primary factor to justify encouragement was the prospect of job variety and content, followed by the benefit of the acquisition of transferable skills
- There was very limited recognition of the income or travel prospects available
- There was no support for the prospect of acquiring a respected status
- Those who disagreed identified that job insecurity, income prospects, and low status were the primary discouraging factors

Construction has a well established tradition of successive generations following their antecedents into the industry which to some degree must reflect some of the positive experiences of those established within the industry. The majority level of support to encourage a young person to pursue a professional or managerial career path within the industry may indicate that the most effective ambassadors for promoting a positive message about the industry, and overcoming any negative preconceptions due to established perceived images, are likely to be the current generation of practitioners. The significance of this for careers promotion is clear as it may be that high calibre potential recruits to the industry may not be encouraged to enter if they have not had the benefit of encouragement and advice from established members of the industry. The positive factors which current practitioners obviously valued were the variety and intrinsic satisfaction of the task and the development of transferable skills, rather than tangibles such as income prospects, which some other respondents identified as a deterrent to recruitment. The survey responses provide some pointers as to the style and content of recruitment programmes for the industry if a flow of high quality applicants is to be realised.

(ix) Participation and discrimination in the industry

The popular image of the construction workforce is that of an ill-regulated body of males carrying out arduous, unsavoury, and often dangerous activities, conducted in a manner which reinforces the stereotypical, caricatured image (Baldry 1995). There is a perception that an intolerant attitude towards minority participation in the process, i.e. by females or non-whites, is the norm and that this is a further indicator of the primeval nature of the industry (McLellan 1995).

The outcomes from the survey were summarised as:

- There was almost total agreement amongst all respondents that they viewed the industry as being an appropriate employment context for both males and females in all areas of professional or managerial activity of the industry
- There was limited support to the proposition that professional or specialist functional roles were the only appropriate context for females in the industry
- There was no support to the proposition that employment in the construction industry was appropriate for males only
- There was almost total support to the view that gender discrimination in construction occurred with the same frequency as in any other sector of society
- There was some very limited support to the suggestion that gender discrimination was endemic and widespread
- The majority of respondents indicated that racial discrimination in construction occurred with the same frequency as in any other sector of society
- There was some limited support, particularly amongst contractors, for the proposition that racial discrimination was limited and infrequent

Whilst anecdotal and case-based examples of both gender and racial discrimination practices within the industry are fairly frequent and of substance the outcome of the survey reflects the strong majority view that such practices are no more serious or frequent within construction than any other sector of society. Whilst traditionally a male dominated industry there was strong support for the acceptance of the proposal that all areas of professional and managerial activity in the industry were appropriate contexts for both males and females. Some respondents did believe that gender discrimination was widespread within the industry although some noted that they suspected that a different culture existed within the site context than elsewhere. In contrast a limited number of contractor respondents believed that racial discrimination to be less significant in construction than other sectors, possibly reflecting a view of a more informal site-based environment. The significance of the survey outcome is that the internal perspective of the incidence of gender and racial discrimination is much more positive than the widely accepted external image, which should be a matter of concern to the industry in terms of image enhancement.

CONCLUSION

The product of construction can not be regarded as a finite article but as a cyclical process which commences with the acceptance by a sponsor of the wish to invest in construction activities and is concluded with the utilisation of the facility by the owner or occupier up to the point when disposal, modification, or reuse is required at which point a new cycle commences. The performance of the industry projects a continuously changing and developing image of itself which stimulates a response from consumers, participants, and observers. The image has suffered from an apparently negative image which may be seen, as indicated by some of the survey results described, to have resulted in supply side organisations accepting this perception as reality when some of the indicators described show that construction sponsors generally hold a more positive of the industry than may have been expected, or is presumed, by contributors to the process.

Clearly there are significant areas which demand attention and of which clients are justifiably critical, for example the inadequate degree of post-completion support provided to owners and occupiers. The opportunity exists to exploit the strengths of the industry in terms of its versatility and flexibility whilst enhancing client confidence by addressing and improving those areas which currently diminish the level of satisfaction experienced by sponsors and the broader constituency of consumers of the products of the industry. As the Latham Report observed: "*The prize is enhanced performance in a healthier atmosphere. It will involve deeper satisfaction for clients. It will lead to a brighter image and better rewards for a great industry"* (Latham 1994).

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