



## HOW'S BUSINESS 2020 ENVIRONMENTAL SCAN

LDCA surveys members annually to gain their perspectives on the key trends and issues facing the construction industry. Member views are important to the LDCA and drive LDCA's priorities over the coming year.

In 2019, members identified Workforce Renewal (aka. "Aging workforce causes labour shortages...manage shortages" and "Apprenticeship..." the top issues of concern in 2019. Based on your responses Workplace Renewal became our focus, including the formation of a new organization (jointly governed by five partner organizations, including LDCA). Formal news of this organization will be shared with members in the near future.

Your input matters. Please take the time to complete the survey.

One member who completes the entire survey will win a \$50 gift certificate to the Keg. You will also have the opportunity to join other respondents in a focused discussion on the issues.

1. Your Name
2. Company Name
3. Business Category Trade  
Contractor General Contractor  
Manufacturer/Supplier  
Professional Allied service
4. What is your role within your company?
5. Would you be willing to be part of a focus group? Yes      No

Please rank each of the issues listed below based on the importance of each to you, numbering each using the scale below:

**1 = critically important, 18 = least important**

Each issue must have its own unique rank (e.g. you can only have one #1 issue, one #2 issue etc.).

1. Continuing increase in government environmental programs (e.g. Building Code updates) and fiscal regimes (e.g. Carbon Tax) will push the construction industry to conform with climate change initiatives.	
2. Energy and environmental impact neutral construction and will become the norm driven by rapidly increasing use of "smart building" technology, LEAN construction techniques, etc.	
3. Aging workforce causes labour shortages resulting in increased immigration/diversity, improvements to the apprenticeship system (e.g. ratios), increased use of labour saving technology to manage shortages.	
4. Government involvement in labour force issues using regulations (e.g. Bill 148) incentives (e.g training incentives) and penalties (e.g. HR quotas for tradespeople) continues to grow.	
5. Certification for on-site workers continues to increase for Health and Safety, Trades and Supervisors.	
6. Apprenticeship and trades training undergoes significant changes, making the system more flexible and efficient and beneficial to contractors.	
7. Bill 142 (e.g. Prompt Payment) drives industry change for the better as issues surrounding payment streams are balanced and fair and disputes are efficiently and effectively resolved.	
8. Ongoing regulatory changes regarding employees (e.g. employment standards) results in continual increases in labour costs whether directly related to compensation, administration etc.	
9. Government funded spending on infrastructure diminishes due to financial constraints (e.g. government debt) resulting in reduced spending or more creative P3 type arrangements.	
10. Free trade agreements (e.g NAFTA, CETA, etc.) create significant risk as private owners of industrial companies rethink Canada.	
11. Manufacturing strategies of increased use of on-site robotics, increased automation, real-time quality control, additive manufacturing (e.g. 3D printing) help reduce systemic inefficiencies and waste.	
12. Information technology drives increased integration between participants and increased efficiency throughout the entire construction process, from design (e.g. BIM) to progress reporting (e.g. drone monitoring), to compliance, to payments.	
13. Increasing use of systems or assemblies made in off-site facilities reduces need for on-site assembly and increased focus on quality and productive installation, reducing need for on-site labour.	
14. Globalized sourcing of building materials, equipment and technology create substantial issues related to standards, codes, etc. and increases importance of procurement.	
15. Industry deals with substantial structural problems (e.g. poor work site performance) via enhanced project delivery strategies (e.g. pre-qualification, Integrated Project Delivery (IPD), industry consolidation, etc. that reduce costs of construction and increase productivity.	
16. Roles of senior project teams continue towards financial managers, risk managers, etc and away from traditional hands-on scheduling/performance roles.	
17. Competition driven by free trade agreements, etc. results in a much smaller local/regional contractor industry due to increased competition, acquisitions, joint-ventures, etc.	
18. Large mega-construction projects are dominated by international consortium and Canadian firms realize lessened roles and opportunities	