Workload Trends 2018 Q1

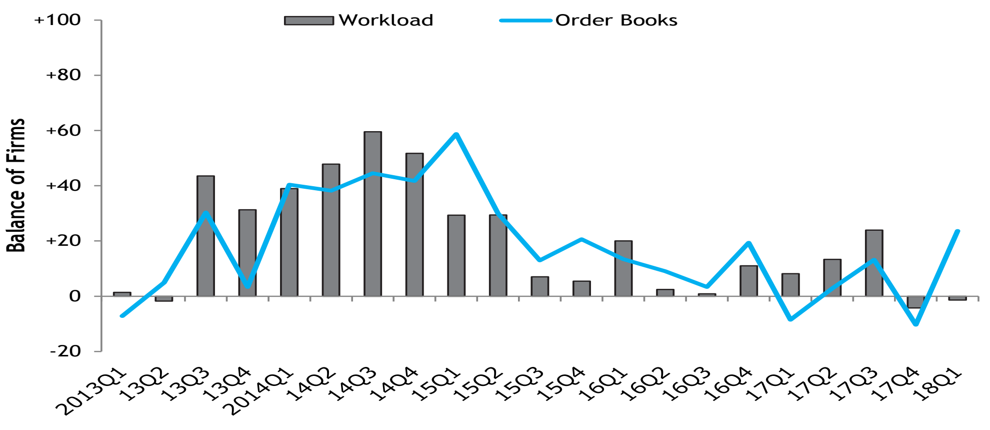
Workloads continued to fall but outlook positive

Weighted Balances (%)

Change on 12 Months Ago	
Workload	
2017 Q1	+8
2018 Q1	-1
Tender Prices	
New Work	
2017 Q1	+50
2018 Q1	+58
R&M Work	
2017 Q1	+37
2018 Q1	+43
Order Books	
2017 Q1	-9
2018 Q1	+24
Over the Next 12 Months	
Expected Workload	
2017 Q1	+5
2018 Q1	+33
Expected Orders	
New Work	
2017 Q1	+6
2018 Q1	+19
R&M Work	
2017 Q1	-13
2018 Q1	+5

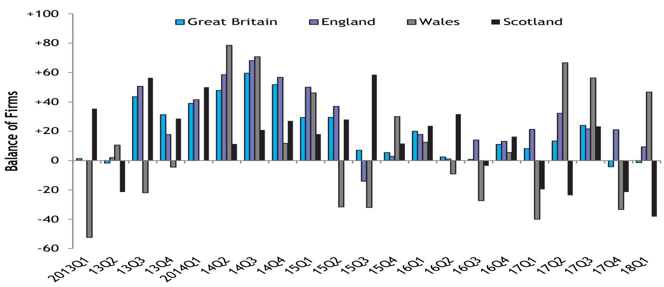
- Workloads declined for a second consecutive quarter in Great Britain, according to 1% of firms, on balance.
- Both local roads and harbours and waterways sectors reported falling workloads for an eleventh successive quarter, on balance.
- Order books increased for 24% of British firms on balance, and one-third expect workloads to increase during the next 12 months.
- On balance, 58% of firms reported higher tender prices for new construction work, the highest in three years and 43% of firms for R&M.
- 84% of British firms, on balance, reported rising costs compared to a year earlier.

Change in Workloads and Order Books - Great Britain



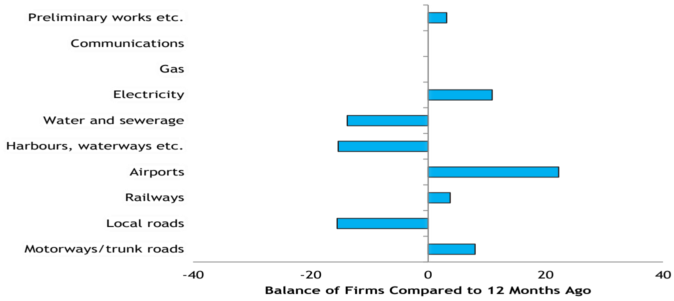
Trends in Workload

Workloads Compared to 12 Months Ago



Workloads decreased, on balance, across Britain for a second consecutive quarter in Q1. In Great Britain, 1% of firms, on balance, reported a decrease in workloads on a year ago, compared to a balance of -4% reported in Q4. Overall, 28% of the respondents reported that workloads had fallen, and 44% of the respondents reported that workloads were unchanged. For England, only 9% of firms, on balance, reported an increase in workloads in Q1, down from 21% in Q4. After reporting a negative balance (-33%) in Q4, workloads increased according to 47% of firms, on balance, in Wales. However, in Scotland, workloads declined for a second consecutive quarter in Q1, according to 38% of firms, on balance. This was the weakest balance since 2010 Q1.

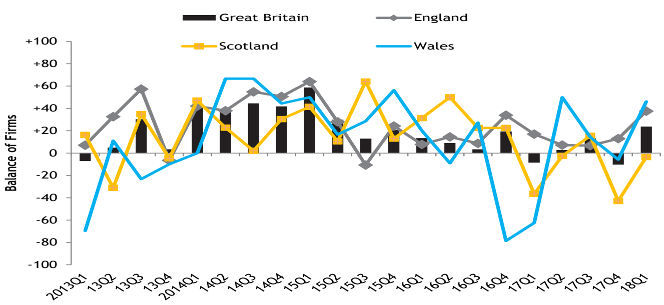
Workload — By Type of Work (GB)



3 out of 10 sectors reported that workloads fell compared to a year earlier, on balance. Both local roads and harbours and waterways remained negative (-15%) in Q1 for an eleventh consecutive quarter. For water and sewerage, on balance, 14% of respondents reported a decline in workloads, a deterioration following a positive balance recorded in Q4. Meanwhile, five sectors reported increasing workloads in Q1, with airports recording the strongest balance (22%). Following six consecutive quarters of decline since 2016 Q3, railways (4%) reported increasing workloads in Q1, on balance. Workloads in electricity (11%), motorways/trunk roads (8%) and preliminary works (3%) also increased in Q1. For preliminary works, this was the lowest balance since 2013 Q1. Both gas and communications reported a zero balance in Q1.

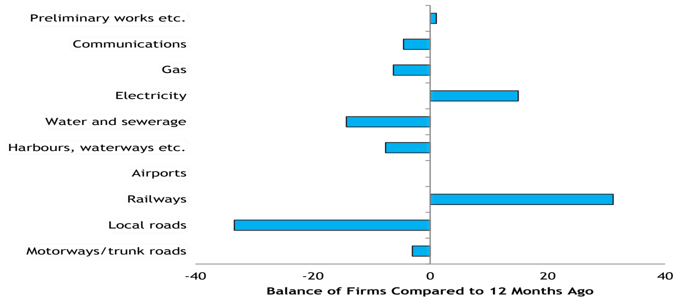
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



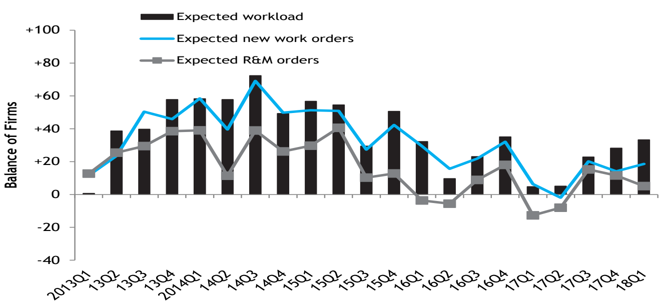
Orders compared to 12 months ago increased on balance, according to 24% of firms in Great Britain. This compares to a balance of 10% reporting a fall in Q4 and was the highest balance in three years. 44% of firms reported that orders had increased and 35% of firms reported that they were unchanged. For England, 38% of firms, on balance, reported an increase in orders in Q1, up from 13% in Q4 and the highest since 2015 Q1. Overall, 55% of firms reported that orders had increased and 28% reported that they were unchanged. After reporting a negative balance in Q4 (-6%), orders increased according to 46% of firms, on balance, in Wales. For a second consecutive quarter, orders in Scotland decreased, on balance, according to 3% of firms. Overall, 34% of firms reported that orders had decreased.

Order Books — By Type of Work (GB)



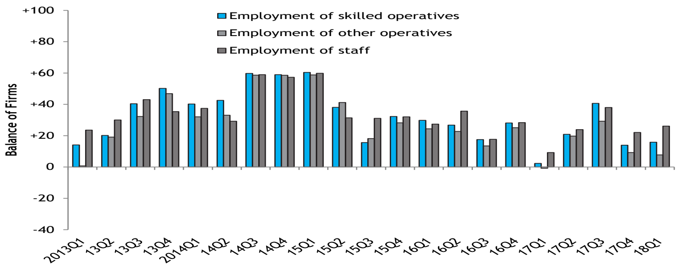
In Q1, six sectors reported a decrease in orders compared to 12 months ago, on balance. Local roads reported the weakest balance, with one-third of firms reporting falling orders in Q1. This marked an eleventh consecutive quarter of decline. Following positive balances in Q4, water and sewerage (-14%), communications (-5%) and motorways/trunk roads (-3%) all reported negative balances in Q1. Both harbours and waterways (-8%) and gas (-6%) also reported a fall in orders, on balance. Meanwhile, three sectors reported an increase in orders compared to 12 months ago, on balance. Following six consecutive quarters of decline, 31% of firms, on balance, reported a rise in orders in railways, whilst electricity (15%) and preliminary works (1%) also recorded positive balances in Q1. For airports, a zero balance was recorded.

Expected Future Trends in the Next 12 Months



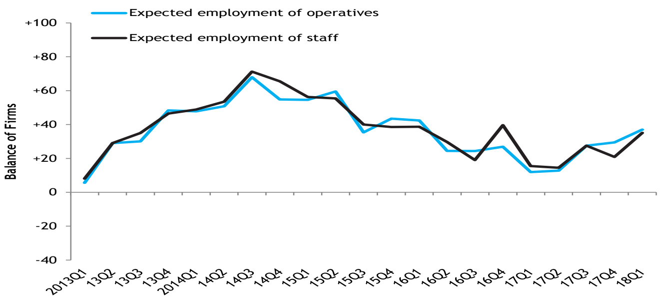
On balance, one-third of firms in Great Britain reported that workloads are expected to increase in the next 12 months, compared to a balance of 28% in Q4. In England, 34% of firms reported that workloads are expected to increase over the next 12 months, on balance. In Scotland, this figure was 3% and in Wales, 71% of firms, on balance expected workloads to increase, the highest balance since 2015 Q1. 19% of British firms expected new work orders to be higher in the next 12 months on balance. By nation; England (13%), Wales (18%) and Scotland (0%). For R&M orders, 5% of British firms, on balance, expected an increase during the next 12 months. This figure is 1% for English and 6% for Welsh firms. However, 3% of Scottish firms expected R&M orders to decrease, on balance.

Employment Compared to 12 months Ago (GB)



Firms continued to report increases in employment in Q1. In Britain, 26% and 16% of firms, on balance, reported an increase in employment of staff and skilled operatives respectively, up from balances of 22% and 14% in Q4. For other operatives, on balance, 8% of firms reported an increase in employment in Q1, down from 9% in Q4. In England, employment of skilled operatives, other operatives and staff increased according to 36%, 25% and 18% of firms respectively. In Wales, employment increased, on balance, according to 18% of firms for both skilled operatives and other operatives, and 71% for staff. In Scotland, employment decreased, on balance, according to 27% of firms for other operatives and 16% for skilled operatives, but 11% reported an increase in staff.

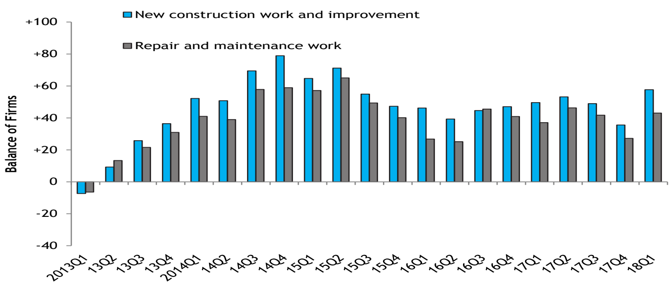
Expected Employment in the Next 12 Months



Looking at the next 12 months, on balance, 37% of firms in Britain expected the employment of operatives to increase and 35% expected the employment of staff to increase. Both balances improved from 29% and 21% respectively, recorded in Q4. In England, 37% and 36% of firms, on balance, anticipated a rise in staff and operatives employment, respectively. Prospects in Scotland improved during the first quarter of 2018 compared to Q4. On balance, 11% of respondents expected employment to increase for both operatives and staff. Employment expectations were the strongest in Wales in Q1. On balance, 76% of firms expected employment to increase for operatives and 65% for staff. Both balances were the highest since 2015 Q1.

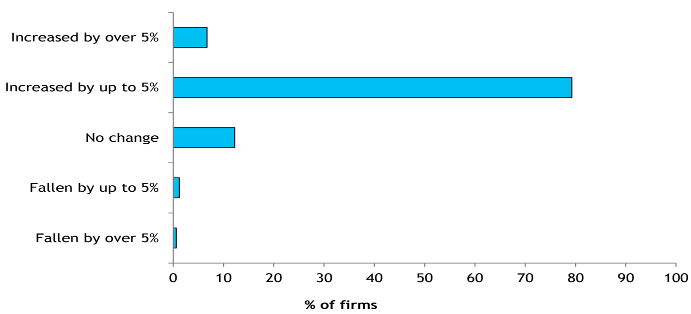
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



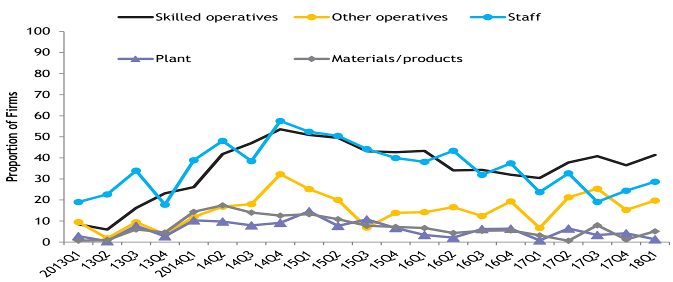
Compared to 12 months ago, tender prices were higher, on balance, for 58% of firms for new construction work and improvement, and 43% for repair and maintenance work. The former marks the highest balance since 2015 Q2. In England, three-quarters of firms, on balance, reported higher tender prices for new construction work and improvement, the highest balance since 2014 Q4, and 49% for repair and maintenance. In Wales, 71% of firms reported an increase in tender prices for new construction work and improvement and 59% for repair and maintenance, on balance. Despite an improvement from Q4, Scottish firms reported the weakest balances in Q1. On balance, 19% of respondents reported an increase in tender prices for new construction work and improvement and 15% for repair and maintenance.

Costs Compared with 12 Months Ago (GB)



In 2018 Q1, 79% of firms in Great Britain reported that costs increased by up to 5% compared to 12 months earlier, 7% reported increases of over 5%, whilst only 2% reported decreases. Overall, a balance of 84% of firms reported an increase in costs, up from 82% in Q4. In England, 83% of firms, on balance, reported an increase in costs, down from 88% Q4. 6% reported rises of over 5%, 77% by up to 5%, whilst no firms reported decreases. In Scotland, costs increased, on balance, according to 73% of firms with 11% of firms reporting increases of over 5%, 70% by up to 5%, whilst 8% of firms reported decreases. In Wales, all firms, on balance, reported an increase in costs over the last 12 months, with 94% of firms reporting increases by up to 5% and 6% by over 5%.

Contractors Unsatisfied with Supply (GB)



Overall, civil engineering firms reported continued difficulties with the supply of suitable workers in Q1. In Great Britain, 41% and 29% of respondents reported dissatisfactory supply of skilled operatives and staff, respectively. The percentage reporting dissatisfaction in supply of other operatives was 20% in Q1 compared to 15% in Q4. For supply of materials/ products, on balance, 5% of firms reported dissatisfaction and only 1% reported dissatisfaction with the supply of plant. The most commonly reported dissatisfaction was supply of skilled operatives in England (39%), Scotland (51%) and Wales (29%). 32% of firms in England were also dissatisfied with the supply of staff, whilst 32% of firms in Scotland and 24% of firms in Wales cited other operatives as another concern.

Workload Trends Survey

1 Workload

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
Compared with 12 Months Ago																	
By Country																	
GB	+39	+48	+60	+52	+29	+29	+7	+5	+20	+2	+1	+11	+8	+13	+24	-4	-1
England	+42	+59	+68	+57	+50	+37	-14	+3	+18	+1	+14	+13	+21	+32	+22	+21	+9
Scotland	+50	+11	+21	+27	+18	+28	+59	+12	+24	+32	-4	+16	-20	-24	+23	-21	-38
Wales	0	+79	+71	+12	+46	-32	-32	+30	+13	-9	-27	+6	-40	+67	+56	-33	+47
By Size of Firm																	
<115	+13	+21	+29	+37	+39	+19	+6	0	-16	-6	+2	+3	+19	0	+17	-20	-26
115-299	+75	+38	+17	+45	+42	+46	+4	-12	-4	0	+30	+16	+45	+32	+29	+4	-8
300-599	+33	+67	+100	+83	+80	0	+50	+11	+30	0	-9	+25	+25	+13	+75	+57	0
600+	+39	+55	+77	+52	+8	+35	-8	+16	+48	+7	-13	+5	-18	0	0	-100	+67
By Type of Work																	
Motorways & trunk roads	+21	+26	+52	+23	+38	+29	-12	-7	-29	-11	-21	-4	-14	-15	+5	-10	+8
Local roads	-9	+9	+35	+2	+15	+10	-24	-31	-16	-11	-27	-13	-22	-16	-19	-24	-15
Railways	+45	+43	+48	-4	+28	-12	-18	-5	+15	+13	-2	-30	-1	-8	-38	-32	+4
Airports	-16	+13	-45	+6	-13	-39	+12	-20	-10	-9	+3	-18	+5	+17	+8	0	+22
Harbours, waterways etc.	+3	+21	+16	-8	+10	+1	-5	-5	-10	-26	-32	-23	-12	-5	-1	-28	-15
Water & sewerage	+2	+5	+11	+8	-1	-8	-22	-9	+16	-19	-7	+1	-16	-10	-6	+1	-14
Electricity	+20	+17	+20	+57	+26	+21	+6	+22	+16	+28	-7	+8	-16	-16	+24	-8	+11
Gas	-26	+21	+9	-22	-40	-37	+6	-32	-55	-75	+21	+14	+29	+57	+57	+6	0
Communications	0	+14	+20	-15	0	0	+3	+23	0	+42	+14	+13	-54	-21	+33	+28	0
Preliminary works, etc.	+48	+36	+45	+45	+34	+59	+22	+41	+33	+19	+9	+26	+37	+11	+12	+10	+3

Weighted % Balance of Respondents

2 Expected Workload

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
In the Next 12 Months																	
By Country																	
GB	+58	+58	+72	+49	+57	+55	+29	+51	+32	+10	+23	+35	+5	+5	+23	+28	+33
England	+63	+73	+73	+65	+65	+70	+17	+73	+45	+26	+50	+60	+31	+16	+20	+50	+34
Scotland	+50	+52	+54	+48	+45	+53	+46	+30	+39	+19	-20	-2	-51	-49	+6	-4	+3
Wales	+22	-4	+86	+70	+82	+42	+20	+8	+12	-52	+18	-11	-68	+42	+25	+35	+71
By Size of Firm																	
<115	+33	+43	+56	+40	+34	+37	+14	+39	+22	+8	+9	+16	+9	+10	+11	+6	+8
115-299	+44	+69	+41	+64	+43	+48	+32	+31	+29	+16	+32	+48	+48	+20	+38	+23	+25
300-599	+63	+100	+100	+63	+67	+63	+45	+64	+42	-50	+8	0	+11	+22	+67	+67	+71
600+	+68	+52	+84	+41	+68	+65	+28	+62	+34	+20	+33	+51	-14	-50	0	+33	+67

Weighted % Balance of Respondents

3 Order Books

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
Compared with 12 Months Ago																	
By Country																	
GB	+40	+38	+45	+42	+59	+30	+13	+21	+13	+9	+3	+19	-9	+3	+13	-10	+24
England	+42	+38	+55	+51	+64	+28	-11	+24	+8	+14	+9	+34	+17	+7	+7	+13	+38
Scotland	+47	+23	+2	+30	+41	+11	+64	+13	+31	+50	+23	+23	-37	-3	+15	-43	-3
Wales	0	+67	+67	+44	+50	+17	+29	+56	+20	-9	+27	-79	-63	+50	+14	-6	+46
By Size of Firm																	
<115	0	+21	+19	+14	+35	+29	+13	+10	-24	-9	-14	+6	+6	+2	+9	-23	-14
115-299	+50	+23	+29	+45	+61	+43	+8	-9	+5	+13	+5	+22	+38	+27	+29	-10	+40
300-599	+40	+67	+100	+40	+75	-17	+36	+38	+43	0	+8	0	+40	+43	+67	+29	0
600+	+50	+44	+52	+52	+63	+45	+4	+34	+23	+16	+9	+34	-43	-75	-33	-33	+100
By Type of Work																	
Motorways & trunk roads	+26	+31	+43	+38	+49	+24	-24	+1	-23	-24	-23	+7	-14	-5	0	+2	-3
Local roads	-8	+21	+8	+13	+21	+9	-23	-24	-16	-17	-41	-25	-31	-11	-19	-29	-33
Railways	+32	+49	+51	+35	+25	-4	-3	-1	+24	+3	-15	-7	-17	-37	-17	-30	+31
Airports	-1	+27	-54	-1	-4	-20	0	-23	+7	+8	-16	-2	-14	-6	+12	-14	0
Harbours, waterways etc.	+6	+15	+5	+5	+21	-3	-10	-11	+1	-13	-28	-24	-15	+5	+4	-9	-8
Water & sewerage	-1	+9	+17	+15	+18	-25	-25	+7	+7	-2	-11	+4	-10	-25	-10	+1	-14
Electricity	+12	+54	+31	+20	+23	0	+29	+40	+36	+26	+3	-2	+4	-27	+31	-14	+15
Gas	-18	+14	-41	-32	-40	-52	+6	-32	-29	-75	+23	+19	+36	+18	+53	-13	-6
Communications	-3	+36	+26	-24	+6	-3	0	+11	-6	+24	+4	+9	-71	+33	+33	+4	-5
Preliminary works, etc.	+22	+45	+31	+28	+41	+62	+24	+37	+31	-1	+14	+17	+23	+26	+4	+4	+1

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
In the Next 12 Months																	
New Work																	
By Country																	
GB	+58	+40	+69	+50	+51	+51	+27	+42	+29	+16	+22	+32	+6	-2	+20	+14	+19
England	+63	+48	+72	+55	+66	+75	+4	+59	+45	+42	+48	+57	+40	+3	+20	+36	+13
Scotland	+38	+30	+48	+51	+26	+31	+47	+27	+26	+8	-12	-12	-52	-42	+6	-23	0
Wales	+22	0	+86	+70	+71	+25	+20	+13	+12	-57	+14	-11	-68	+42	0	+25	+18
By Size of Firm																	
<115	+33	+37	+43	+28	+30	+33	+21	+33	+18	0	-4	+21	+2	+5	+7	+2	+2
115-299	+50	+56	+41	+68	+40	+52	+41	+19	+19	+10	+18	+34	+48	+16	+42	+12	+14
300-599	+43	+100	+100	+75	+67	+38	+55	+64	+42	-67	+31	0	0	+22	+33	+44	+71
600+	+71	+26	+82	+41	+60	+65	+12	+50	+34	+42	+33	+51	-6	-75	0	0	0
R&M																	
By Country																	
GB	+39	+11	+39	+26	+30	+41	+10	+13	-4	-6	+9	+18	-13	-8	+15	+12	+5
England	+51	+25	+37	+37	+44	+53	-10	+26	-3	+11	+41	+40	+8	-10	+18	+30	+1
Scotland	+31	+2	+38	+10	+8	+41	+36	+19	+23	-16	-14	-14	-43	-18	+7	0	-3
Wales	-11	-33	+54	+15	+15	+21	+4	-29	-31	-35	-5	-17	-68	+8	0	-10	+6
By Size of Firm																	
<115	+10	+20	+37	+10	+23	+14	-7	+17	+2	-16	0	0	+5	-2	-2	-8	+4
115-299	+18	+40	+44	+33	+23	+28	+25	-4	+23	+7	+4	+15	+19	+5	+24	+13	-4
300-599	+38	+43	+67	0	+40	+43	+30	+55	0	-17	+8	0	0	+22	+33	+25	+29
600+	+53	-3	+33	+38	+33	+66	+3	0	-21	-6	+18	+37	-35	-75	+25	+50	0

Weighted % Balance of Respondents

5 Employment

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	+40	+43	+60	+59	+60	+38	+16	+32	+30	+27	+18	+28	+2	+21	+41	+14	+16
England	+43	+55	+76	+58	+60	+44	+1	+17	+20	+19	+25	+30	+24	+43	+39	+29	+36
Scotland	+58	+26	+24	+43	+56	+56	+35	+46	+54	+53	+31	+38	-15	-11	+31	-4	-16
Wales	0	+4	+52	+40	+81	-12	-44	+58	+31	+35	+14	0	-61	+42	+63	+35	+18
Other operatives																	
GB	+32	+33	+59	+59	+59	+41	+18	+28	+24	+23	+13	+25	-1	+20	+29	+9	+8
England	+35	+39	+70	+59	+63	+46	+2	+8	+12	+19	+19	+27	+22	+37	+31	+28	+25
Scotland	+39	+17	+24	+37	+55	+63	+40	+50	+46	+43	+18	+29	-25	-10	+28	-8	-27
Wales	0	+4	+66	+50	+86	-4	-24	+54	+42	+26	+36	+14	-50	+33	+44	-5	+18
Staff																	
GB	+37	+29	+59	+57	+60	+31	+31	+32	+27	+36	+18	+28	+9	+24	+38	+22	+26
England	+42	+40	+78	+52	+62	+42	+27	+12	+20	+30	+21	+30	+42	+43	+40	+35	+18
Scotland	+56	+10	+8	+42	+63	+38	+40	+54	+40	+59	+31	+27	-22	0	+31	+2	+11
Wales	+22	-15	+66	+60	+76	+24	-20	+54	+32	+30	+41	+39	-25	+75	+69	+40	+71
By Size of Firm																	
Skilled operatives																	
<115	+25	+18	+30	+18	+29	+12	0	+2	-11	+7	0	+13	+14	+4	+15	-7	-15
115-299	+44	+56	+33	+61	+55	+47	+7	+11	+34	+29	+59	+42	+35	+30	+54	0	+14
300-599	+56	+75	+43	+56	+86	+38	+27	+45	+67	+17	+38	+20	+33	+44	+75	+78	+43
600+	+40	+40	+81	+78	+68	+48	+22	+54	+31	+35	-13	+28	-22	0	+50	0	+50
Other operatives																	
<115	+19	+36	+30	+25	+35	+22	+2	0	-9	+7	-2	+5	+2	+7	+9	-11	-13
115-299	+56	+56	+33	+54	+54	+50	+10	+15	+14	+23	+38	+33	+30	+23	+27	-4	+7
300-599	+38	+75	+57	+56	+86	+38	+36	+45	+58	-25	+31	+25	+33	+50	+75	+67	+29
600+	+30	+18	+76	+78	+63	+48	+22	+43	+31	+35	-5	+28	-24	0	+50	0	+33
Staff																	
<115	+21	+14	+32	+32	+27	+12	+24	+14	0	+15	-2	+3	+6	+18	+20	+7	-2
115-299	+39	+56	+33	+50	+55	+40	+10	+22	+24	+29	+50	+42	+39	+28	+41	+11	+36
300-599	+44	+63	+71	+44	+71	+38	+36	+45	+55	+17	+38	+30	+56	+44	+75	+78	+29
600+	+40	+21	+74	+78	+70	+35	+43	+41	+31	+51	-5	+28	-15	0	+50	0	+67

Weighted % Balance of Respondents

6 Expected Employment

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	+48	+51	+68	+55	+55	+60	+35	+44	+42	+24	+24	+27	+12	+13	+28	+29	+37
England	+49	+58	+65	+54	+59	+71	+25	+66	+52	+40	+54	+48	+26	+15	+28	+45	+36
Scotland	+45	+49	+63	+44	+51	+38	+51	+30	+51	+30	-15	-2	-29	-33	+3	+8	+11
Wales	+28	-4	+84	+75	+76	+58	+20	+8	+15	-43	+14	-11	-25	+42	+25	+35	+76
Employment of staff																	
GB	+49	+54	+71	+66	+56	+55	+40	+39	+39	+30	+19	+40	+15	+14	+28	+21	+35
England	+62	+63	+70	+68	+65	+69	+31	+53	+52	+47	+51	+62	+28	+19	+27	+44	+37
Scotland	+34	+51	+66	+56	+48	+19	+49	+34	+44	+24	-12	+2	-27	-22	+13	-13	+11
Wales	+17	-4	+84	+75	+71	+54	+4	-4	+19	-39	+18	+33	-11	+42	+25	+30	+65
By Size of Firm																	
Operative jobs																	
<115	+29	+41	+34	+36	+25	+33	+12	+31	+16	+18	+13	+10	+14	+17	+11	+6	+14
115-299	+50	+63	+56	+64	+40	+52	+34	+19	+36	+26	+29	+34	+43	+16	+38	+27	+21
300-599	+63	+86	+100	+50	+67	+63	+55	+73	+50	-50	+15	+11	0	+33	+67	+67	+71
600+	+50	+45	+76	+59	+68	+79	+37	+50	+53	+42	+33	+37	+3	-25	+25	+33	+75
Employment of staff																	
<115	+25	+27	+29	+40	+19	+26	+14	+21	+14	+13	+13	+13	+16	+3	+7	+2	+16
115-299	+33	+56	+63	+71	+40	+48	+41	+20	+39	+19	+25	+28	+52	+33	+42	+27	+21
300-599	+63	+100	+100	+75	+67	+50	+45	+45	+50	-50	+15	+33	+11	+33	+67	+33	+71
600+	+57	+52	+81	+70	+72	+79	+47	+54	+44	+59	+21	+65	+3	-25	+25	+33	+67

Weighted % Balance of Respondents

7 Costs*

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	0	0	0	0	0	0	+0	0	0	0	0	0	0	+1	+1
Unchanged	0	0	+5	+1	+1	+1	+1	+2	+5	+7	+12	+1	+1	+1	0	+2	+1
Slower	+10	+15	+19	+8	+10	+9	+9	+13	+15	+19	+18	+9	+15	+15	+18	+11	+12
Same rate	+75	+77	+61	+68	+67	+75	+78	+71	+71	+54	+59	+74	+70	+71	+69	+81	+79
Faster	+15	+9	+15	+23	+21	+16	+12	+14	+8	+19	+11	+16	+14	+14	+13	+5	+7
Cost Balances																	
By Country																	
GB	+90	+85	+71	+90	+87	+89	+90	+83	+74	+67	+58	+88	+84	+84	+82	+82	+84
England	+90	+88	+78	+95	+90	+92	+90	+90	+81	+82	+60	+90	+90	+75	+71	+88	+83
Scotland	+86	+77	+74	+78	+85	+81	+100	+82	+98	+85	+79	+93	+94	+91	+97	+71	+73
Wales	+83	+96	+80	+90	+81	+88	+64	+96	+50	+4	+18	+67	+57	+100	+100	+85	+100
By Size of Firm																	
<115	+79	+86	+84	+77	+62	+67	+79	+76	+68	+74	+63	+80	+81	+84	+83	+74	+83
115-299	+83	+94	+81	+82	+73	+87	+77	+81	+68	+67	+69	+79	+74	+78	+79	+82	+82
300-599	+63	+75	+83	+89	+86	+100	+91	+82	+92	+50	+69	+90	+89	+100	+100	+100	+100
600+	+100	+86	+62	+100	+100	+100	+100	+88	+72	+68	+41	+100	+87	+75	+75	+75	+75

* Discontinuity in series due to an amendment to the question in order to collect more detailed information on the degree of cost change.

8 Tender Prices

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+52	+51	+69	+79	+65	+71	+55	+47	+46	+39	+45	+47	+50	+53	+49	+36	+58
England	+56	+40	+69	+86	+69	+72	+38	+61	+56	+53	+45	+53	+55	+52	+51	+55	+75
Scotland	+13	+39	+42	+59	+38	+56	+58	+23	+54	+39	+63	+45	+51	+51	+38	+4	+19
Wales	+53	+73	+86	+80	+59	+63	+48	+42	+27	+4	+18	-11	+32	+92	+63	+45	+71
By Size of Firm																	
<115	+24	+45	+35	+53	+26	+40	+33	+35	+20	+33	+28	+16	+36	+29	+38	+22	+27
115-299	+56	+69	+56	+79	+53	+59	+37	+27	+31	+23	+48	+48	+39	+58	+48	+27	+50
300-599	+29	+57	+100	+63	+100	+63	+73	+55	+67	+33	+69	+60	+44	+78	+100	+89	+86
600+	+64	+47	+79	+94	+75	+100	+66	+62	+56	+51	+36	+54	+61	+50	+50	0	+100
R&M																	
By Country																	
GB	+41	+39	+58	+59	+57	+65	+49	+40	+27	+25	+46	+41	+37	+46	+42	+27	+43
England	+46	+29	+50	+81	+55	+68	+37	+63	+39	+29	+62	+46	+33	+41	+43	+37	+49
Scotland	+28	+36	+34	+38	+52	+59	+59	+23	+44	+33	+60	+42	+46	+38	+21	-12	+15
Wales	+53	+62	+81	+50	+8	+54	+48	+17	-15	+13	0	-11	+46	+83	+63	+45	+59
By Size of Firm																	
<115	+17	+27	+26	+45	+24	+27	+29	+39	+17	+26	+30	+19	+14	+20	+31	+19	+24
115-299	+60	+60	+38	+54	+48	+52	+27	+32	+24	+21	+33	+30	+38	+52	+42	+35	+42
300-599	+43	+50	+83	+57	+80	+86	+70	+45	+11	+33	+54	+60	+44	+67	+67	+75	+86
600+	+44	+36	+71	+67	+68	+90	+59	+43	+38	+25	+58	+50	+43	+50	+50	-25	+33

Weighted % Balance of Respondents

9 Supply of Resources Required

	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1
Skilled Operatives																	
GB	26	42	47	54	51	50	43	43	43	34	34	32	30	38	41	36	41
England	23	47	47	54	54	37	41	49	44	38	39	25	39	36	31	37	39
Scotland	35	33	46	62	66	63	33	45	51	49	32	55	40	24	38	42	51
Wales	33	11	32	25	29	33	0	21	27	17	45	0	7	67	69	0	29
Other Operatives																	
GB	12	17	18	32	25	20	7	14	14	17	12	19	7	21	25	15	20
England	18	27	11	30	27	17	4	14	11	16	12	14	12	15	16	11	15
Scotland	10	16	21	32	8	13	9	4	20	23	15	37	3	16	31	23	32
Wales	0	0	30	0	29	33	0	13	0	17	5	0	0	33	25	0	24
Staff																	
GB	39	48	38	58	52	50	44	40	38	43	32	37	24	33	19	24	29
England	39	53	26	51	53	43	35	44	44	54	30	35	31	30	18	32	32
Scotland	40	40	33	61	58	66	62	41	37	43	38	36	21	22	25	19	27
Wales	33	41	64	35	24	58	16	17	8	17	0	22	0	33	0	0	0
Plant																	
GB	10	10	8	9	15	8	11	7	3	2	6	6	1	6	3	4	1
England	9	12	6	15	12	7	6	1	3	2	4	3	1	5	5	8	1
Scotland	3	12	4	5	23	9	7	9	2	5	5	8	2	0	0	0	0
Wales	0	0	0	10	24	25	0	8	8	0	23	22	0	0	0	0	6
Materials and Products																	
GB	14	17	14	13	13	11	8	7	7	4	5	6	3	1	8	1	5
England	16	17	22	23	18	6	3	5	3	1	9	5	5	2	10	3	4
Scotland	3	14	2	5	6	6	21	2	9	15	2	8	3	0	9	0	3
Wales	0	0	0	5	0	33	0	0	0	0	0	0	0	0	0	0	0

% of Respondents Reporting Unsatisfactory Availability of Resources

About the Civil Engineering Contractors Association (CECA) and Workload Trends

The number of contractors taking part in CECA's 2018 Q1 survey totalled 102. The survey responses are weighted by size of firm to ensure that results are representative of the industry. The results displayed are typically weighted balances and are calculated by taking the difference between firms reporting an increase in workloads, for example, and the proportion of firms experiencing a fall.

CECA has over 300 member firms which carry out more than 80% of all civil engineering work in Great Britain. The quarterly CECA survey of civil engineering workload trends, in which more than a third of the membership takes part, tests for changes over the past year in contractors' workload, workforce, order books, cost trends, and tender prices. It also examines the supply situation for key resources, and contractors' expectations of trends in new orders and employment in the coming 12 months. Full reports of the CECA survey are available to non-members; £30 per single copy or £100 for an annual subscription.

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