Workload Trends 2019 Q4

Widespread weakness in workloads but outlook improves

Weighted Balances (%)

Change on 12 Months Ago

Workload

2018 Q4	-3
2019 Q4	+3

Tender Prices

New Work

2018 Q4	+46
2019 Q4	+29

R&M Work

2018 Q4	+36
2019 Q4	+23

Order Books

2018 Q4	-8
2019 Q4	+13

Over the Next 12 Months

Expected Workload

2018 Q4	+4
2019 Q4	+27

Expected Orders

New Work

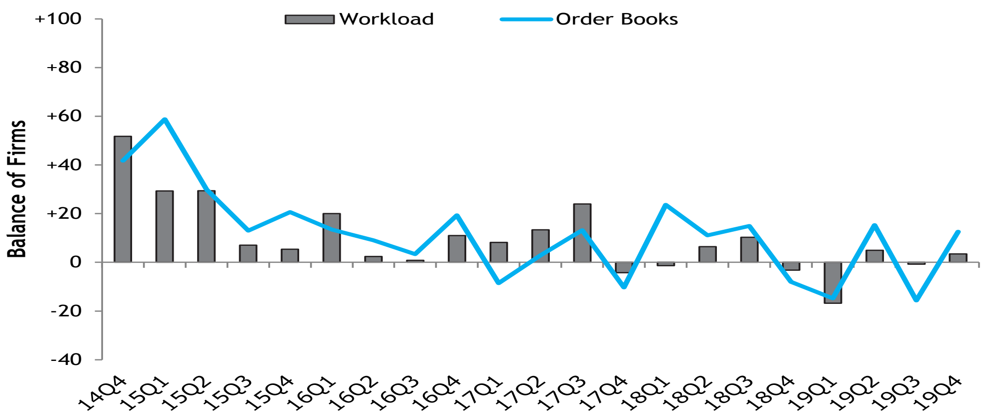
2018 Q4	+4
2019 Q4	+23

R&M Work

2018 Q4	-2
2019 Q4	+15

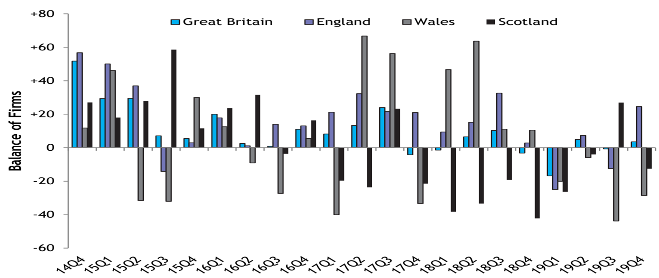
- Workloads increased in Q4, according to 3% of British firms, on balance, following a decline in Q3 (-1%).
- Of the 10 sectors, only railways reported an increase in workloads, according to 9% firms, on balance.
- Order books increased for 13% of firms on balance, and 27% expect increased workloads during the next 12 months.
- Tender price balances for new construction work and R&M were the lowest in nearly seven years.
- 52% of British firms, on balance, reported supply issues with skilled operatives, the highest in nearly five years.

Change in Workloads and Order Books - Great Britain



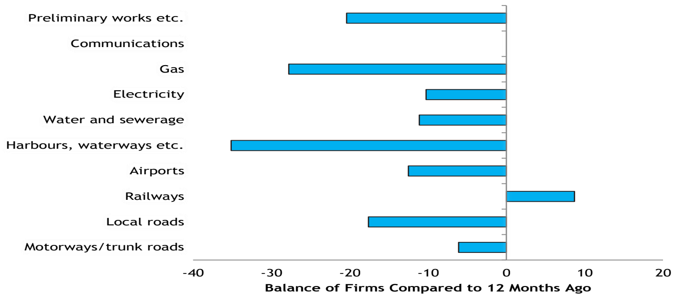
Trends in Workload

Workloads Compared to 12 Months Ago



After declining in Q3, workloads improved in Great Britain during the fourth quarter of 2019. In Great Britain, 3% of firms, on balance, reported an increase in workloads on a year ago, compared to a balance of 1% in Q3 that reported that workloads fell. Overall, 34% of the respondents reported that workloads had increased, and 35% of the respondents reported that workloads were unchanged. For England, one-quarter of firms, on balance, reported an increase in workloads in Q4, following a negative balance (-13%) in Q3. This was the highest balance since 2018 Q3. However, in Scotland, 13% of firms, on balance, reported a decrease in workloads in Q4, compared to 27% that reported workloads had risen in Q3. Furthermore, in Wales, workloads declined for a fourth consecutive quarter in Q4, according to 29% of firms, on balance.

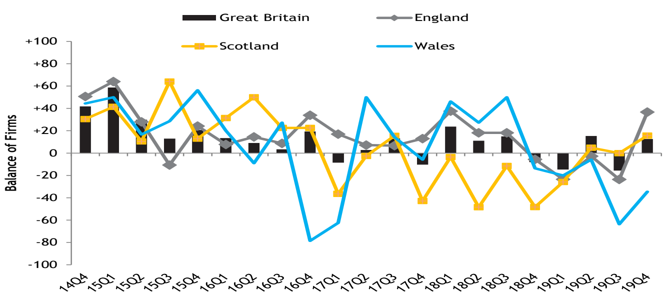
Workload — By Type of Work (GB)



8 out of 10 sectors in Great Britain reported that workloads fell compared to a year earlier, on balance, in Q4. The sector that reported the weakest balance in workloads in Q4 was harbours and waterways, with 35% of firms reporting a decline, on balance. This was followed by gas (-28%), preliminary works (-20%) and local roads (-18%). For local roads, this marked the eighteenth consecutive quarter of decline. Airports (-13%), water and sewerage (-11%) and electricity (-10%) all remained negative in Q4 for the second consecutive quarter. After reporting a positive balance in Q3, motorways/trunk roads also reported a negative balance (-6%) in Q4. Meanwhile, railways (9%) was the only sector to experience increasing workloads in Q4. For communications, a zero balance was reported in Q4, with 43% of firms reporting unchanged workloads.

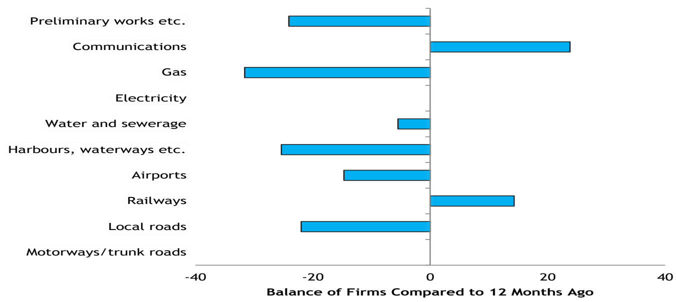
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



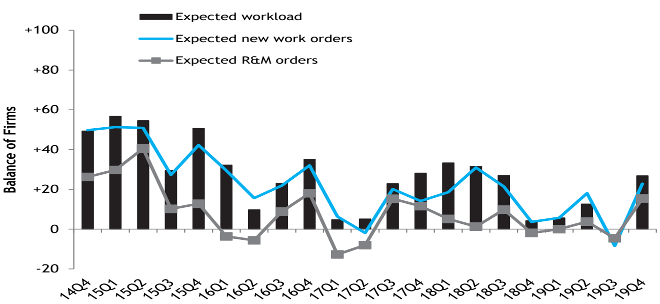
Order books improved in Great Britain during the fourth quarter of 2019. On balance, 13% of firms reported an increase in orders compared to a year earlier, up from a near seven-year low balance of -16% in Q3. 42% of firms reported that orders had increased and 30% of firms reported that they had decreased. In England, 37% of firms, on balance, reported an increase in orders in Q4 following four consecutive quarters of decline and marking the highest balance in two years. Overall, 51% of firms reported that orders had increased and 35% reported that they were unchanged. After reporting a zero balance in Q3, orders increased according to 16% of firms, on balance, in Scotland. For a fifth consecutive quarter, orders in Wales decreased, on balance, according to 35% of firms.

Order Books — By Type of Work (GB)



In Q4, six sectors reported a decrease in orders compared to 12 months ago, on balance. Gas (-32%), preliminary works (-24%) and harbours and waterways (-25%) all reported a decrease in orders, on balance, in Q4. For gas and preliminary works, this marked the sixth consecutive quarter of decline. Negative balances were also recorded in both local roads (-22%) and water and sewerage (-5%) for a second consecutive quarter. The airports sector also reported an annual decline in orders, according to 15% of firms, on balance. Meanwhile, a balance of 24% and 14% of firms reported an annual increase in orders in communications and railways respectively, in Q4. For both motorways/trunk roads and electricity, a zero balance was recorded in Q4.

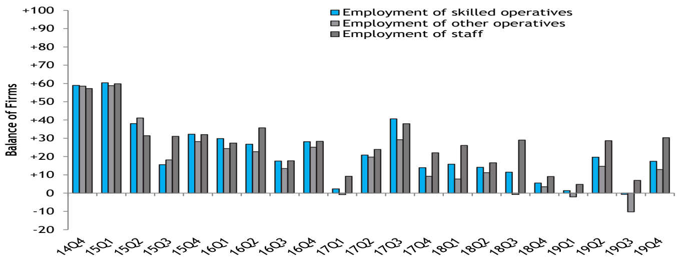
Expected Future Trends in the Next 12 Months



In Q4, 27% of firms, on balance, in Great Britain reported that workloads are expected to increase in the next 12 months. This compares to a zero balance recorded in Q3 and was the highest since 2018 Q3. In England, this figure was 39% and in Scotland, 27% of firms, on balance, expected workloads to increase, the highest balance in four years. However, in Wales, 32% of firms, on balance, expected workloads to fall over the next 12 months, the weakest balance in three years. For new work orders, 23% of British firms expected an increase in the next 12 months, on balance. By nation; England (33%), Scotland (30%) and Wales (-32%). The balance for Scotland was the highest since 2015 Q3. For R&M orders, 15% of British firms, on balance, expected an increase during the next 12 months. By nation; England (26%), Scotland (19%) and Wales (-35%).

Trends in Employment

Employment Compared to 12 months Ago (GB)



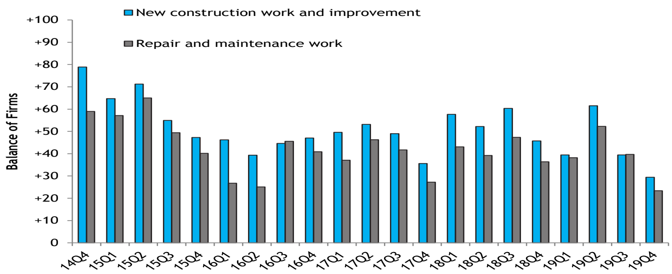
In Great Britain, on balance, 17% and 13% of firms reported an increase in employment of skilled operatives and other operatives respectively, up from -1% and -10% in Q3. For staff, on balance, 30% of firms reported an increase in employment in Q4, up from 7% in Q3 and the highest since 2017 Q3. In England, employment of staff, skilled operatives and other operatives rose according to 32%, 27% and 26% of firms respectively. In Wales, 34% and 7% of respondents reported increases in the employment of staff and skilled operatives respectively, whilst a zero balance was reported for other operatives. In Scotland, employment decreased, on balance, according to 12% of firms for other operatives and 3% for skilled operatives, but 12% reported an increase in staff.

Expected Employment in the Next 12 Months

Looking at employment expectations for the next 12 months, on balance, 26% of firms in Britain expected the employment of operatives to increase and 20% expected the employment of staff to increase. In England, on balance, 38% of firms expect the employment of operatives to increase, and for staff, a balance of 28% was recorded. In Scotland, on balance, 24% of respondents expected employment to increase for staff and 21% for operatives. This compares to a balance of only 3% recorded for both types of employment in Q3. In Wales, however, employment intentions for the year ahead remained weak for a second consecutive quarter in Q4. On balance, 27% of respondents expected employment to fall for operatives and 18% for staff. Both balances were the weakest since 2016 Q2.

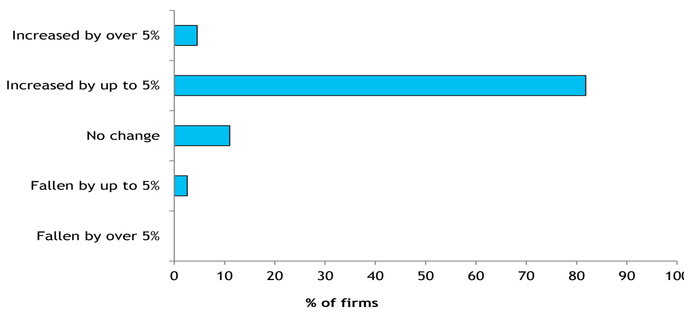
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



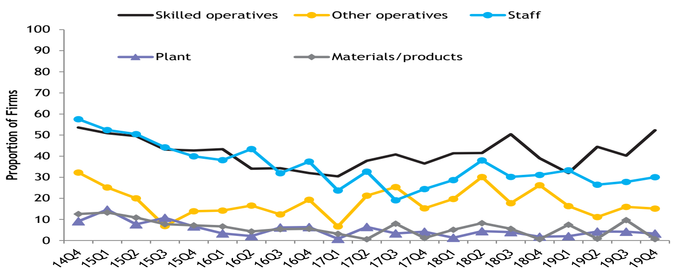
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 29% of firms for new construction work and improvement, and 23% for repair and maintenance work. Both balances were the lowest since 2013 Q3. In England, tender prices were higher, on balance, for 34% and 31% of firms for new construction work and improvement, and for repair and maintenance work, respectively. In Scotland, 19% of respondents reported an increase in tender prices for new construction work and improvement, and 29% for repair and maintenance, on balance. In Wales, on balance, 11% of respondents reported an increase in tender prices for new construction work and improvement, whilst a zero balance was recorded for repair and maintenance. Both balances were the lowest since 2016 Q4.

Costs Compared with 12 Months Ago (GB)



In Q4, 84% of firms in Great Britain reported an increase in costs, on balance, up from 80% in Q3. Overall, 82% of firms reported that costs increased by up to 5% compared to 12 months earlier and 5% reported increases of over 5%. In England, 82% of firms, on balance, reported an increase in costs, up from 65% in Q3. 2% of firms reported rises of over 5%, 84% by up to 5%, whilst 3% of firms reported decreases. In Scotland, costs increased, on balance, according to 91% of firms with 6% of firms reporting increases of over 5%, 85% by up to 5%, whilst no firms reported decreases for a third consecutive quarter. In Wales, 79% of firms, on balance, reported an increase in costs over the last 12 months, down from 90% in Q3 and the lowest balance in three years. 86% of firms reported increases by up to 5%, whilst 7% of firms reported decreases.

Contractors Unsatisfied with Supply (GB)



Overall, civil engineering firms reported continued difficulties with the supply of suitable workers in Q4. In Great Britain, 52% of respondents reported dissatisfaction with the supply of skilled operatives, the highest proportion since 2014 Q4. The percentage reporting dissatisfaction in supply of staff and other operatives was 30% and 15% in Q4, compared to 28% and 16% respectively in Q3. For supply of plant 3% of firms reported dissatisfaction and 1% reported dissatisfaction with the supply of materials/products. The most commonly reported dissatisfaction with supply in Q4 was for skilled operatives in England (52%), Scotland (63%) and Wales (36%). For Scotland, this was the highest proportion since 2015 Q2. 19% of English firms, 38% of Scottish firms and 32% of Welsh firms were also dissatisfied with the supply of staff.

1 Workload

	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
GB	+5	+20	+2	+1	+11	+8	+13	+24	-4	-1	+6	+10	-3	-17	+5	-1	+3
England	+3	+18	+1	+14	+13	+21	+32	+22	+21	+9	+15	+33	+3	-25	+7	-13	+25
Scotland	+12	+24	+32	-4	+16	-20	-24	+23	-21	-38	-33	-19	-42	-26	-4	+27	-13
Wales	+30	+13	-9	-27	+6	-40	+67	+56	-33	+47	+64	+11	+11	-20	-6	-44	-29
By Size of Firm																	
<115	0	-16	-6	+2	+3	+19	0	+17	-20	-26	-2	+8	+3	+8	0	+3	-6
115-299	-12	-4	0	+30	+16	+45	+32	+29	+4	-8	+22	+19	-3	-11	-8	-5	+16
300-599	+11	+30	0	-9	+25	+25	+13	+75	+57	0	0	-13	-13	-20	0	0	0
600+	+16	+48	+7	-13	+5	-18	0	0	-100	+67	0	+50	0	-67	+50	0	0
By Type of Work																	
Motorways & trunk roads	-7	-29	-11	-21	-4	-14	-15	+5	-10	+8	-10	-13	+6	+2	-1	+3	-6
Local roads	-31	-16	-11	-27	-13	-22	-16	-19	-24	-15	-21	-21	-15	-27	-1	-2	-18
Railways	-5	+15	+13	-2	-30	-1	-8	-38	-32	+4	-13	-13	-28	-20	+11	-8	+9
Airports	-20	-10	-9	+3	-18	+5	+17	+8	0	+22	+19	-9	-7	-37	+30	-24	-13
Harbours, waterways etc.	-5	-10	-26	-32	-23	-12	-5	-1	-28	-15	+9	+4	+8	-21	-19	-37	-35
Water & sewerage	-9	+16	-19	-7	+1	-16	-10	-6	+1	-14	+10	-1	-13	-19	+36	-44	-11
Electricity	+22	+16	+28	-7	+8	-16	-16	+24	-8	+11	+12	+12	-33	-46	+14	-3	-10
Gas	-32	-55	-75	+21	+14	+29	+57	+57	+6	0	+42	-58	-11	+6	-53	-31	-28
Communications	+23	0	+42	+14	+13	-54	-21	+33	+28	0	+21	-13	+15	+54	-22	+57	0
Preliminary works, etc.	+41	+33	+19	+9	+26	+37	+11	+12	+10	+3	+2	+3	-9	-8	-25	-22	-20

Weighted % Balance of Respondents

2 Expected Workload

	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
In the Next 12 Months																	
By Country																	
GB	+51	+32	+10	+23	+35	+5	+5	+23	+28	+33	+32	+27	+4	+6	+13	0	+27
England	+73	+45	+26	+50	+60	+31	+16	+20	+50	+34	+48	+25	+7	+17	+18	+8	+39
Scotland	+30	+39	+19	-20	-2	-51	-49	+6	-4	+3	-20	-11	-4	-21	-38	-6	+27
Wales	+8	+12	-52	+18	-11	-68	+42	+25	+35	+71	+70	+60	+13	+5	+37	-15	-32
By Size of Firm																	
<115	+39	+22	+8	+9	+16	+9	+10	+11	+6	+8	+8	+17	-2	+19	-12	+5	+20
115-299	+31	+29	+16	+32	+48	+48	+20	+38	+23	+25	+48	+53	0	0	0	+11	+46
300-599	+64	+42	-50	+8	0	+11	+22	+67	+67	+71	+33	+25	+25	0	+14	+20	+14
600+	+62	+34	+20	+33	+51	-14	-50	0	+33	+67	+50	0	0	0	+67	-50	0

Weighted % Balance of Respondents

3 Order Books

	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
GB	+21	+13	+9	+3	+19	-9	+3	+13	-10	+24	+11	+15	-8	-15	+15	-16	+13
England	+24	+8	+14	+9	+34	+17	+7	+7	+13	+38	+18	+18	-6	-24	-3	-24	+37
Scotland	+13	+31	+50	+23	+23	-37	-3	+15	-43	-3	-48	-12	-48	-26	+5	0	+16
Wales	+56	+20	-9	+27	-79	-63	+50	+14	-6	+46	+27	+50	-14	-20	-6	-64	-35
By Size of Firm																	
<115	+10	-24	-9	-14	+6	+6	+2	+9	-23	-14	+7	-3	-3	+6	-8	-13	+2
115-299	-9	+5	+13	+5	+22	+38	+27	+29	-10	+40	+27	+13	-8	-18	0	-8	+25
300-599	+38	+43	0	+8	0	+40	+43	+67	+29	0	-25	0	-50	0	-13	-33	+14
600+	+34	+23	+16	+9	+34	-43	-75	-33	-33	+100	+100	+100	+50	-67	+100	0	0
By Type of Work																	
Motorways & trunk roads	+1	-23	-24	-23	+7	-14	-5	0	+2	-3	-2	-10	-16	+4	+4	-14	0
Local roads	-24	-16	-17	-41	-25	-31	-11	-19	-29	-33	-23	-26	-22	-19	+8	-18	-22
Railways	-1	+24	+3	-15	-7	-17	-37	-17	-30	+31	-19	+20	+16	-10	+5	-29	+14
Airports	-23	+7	+8	-16	-2	-14	-6	+12	-14	0	-4	-13	-23	-59	+33	0	-15
Harbours, waterways etc.	-11	+1	-13	-28	-24	-15	+5	+4	-9	-8	+5	-4	+9	-32	-26	-48	-25
Water & sewerage	+7	+7	-2	-11	+4	-10	-25	-10	+1	-14	+1	-5	-30	-22	+23	-44	-5
Electricity	+40	+36	+26	+3	-2	+4	-27	+31	-14	+15	0	+7	-25	-45	-21	-3	0
Gas	-32	-29	-75	+23	+19	+36	+18	+53	-13	-6	+57	-67	-32	-7	-53	-20	-32
Communications	+11	-6	+24	+4	+9	-71	+33	+33	+4	-5	+8	-11	+19	+7	-30	+50	+24
Preliminary works, etc.	+37	+31	-1	+14	+17	+23	+26	+4	+4	+1	+8	-9	-34	-18	-15	-24	-24

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
In the Next 12 Months																	
New Work																	
By Country																	
GB	+42	+29	+16	+22	+32	+6	-2	+20	+14	+19	+31	+21	+4	+6	+18	-8	+23
England	+59	+45	+42	+48	+57	+40	+3	+20	+36	+13	+49	+21	+10	+21	+21	+3	+33
Scotland	+27	+26	+8	-12	-12	-52	-42	+6	-23	0	-26	-18	-6	-18	-46	-25	+30
Wales	+13	+12	-57	+14	-11	-68	+42	0	+25	+18	+70	+45	0	-10	+37	-15	-32
By Size of Firm																	
<115	+33	+18	0	-4	+21	+2	+5	+7	+2	+2	+10	+7	-13	+14	-15	-5	+16
115-299	+19	+19	+10	+18	+34	+48	+16	+42	+12	+14	+44	+35	+6	+5	0	0	+39
300-599	+64	+42	-67	+31	0	0	+22	+33	+44	+71	+33	+38	+25	0	+14	+10	+14
600+	+50	+34	+42	+33	+51	-6	-75	0	0	0	+50	0	0	0	+100	-50	0
R&M																	
By Country																	
GB	+13	-4	-6	+9	+18	-13	-8	+15	+12	+5	+1	+10	-2	0	+4	-5	+15
England	+26	-3	+11	+41	+40	+8	-10	+18	+30	+1	+20	+17	+2	+15	+9	-2	+26
Scotland	+19	+23	-16	-14	-14	-43	-18	+7	0	-3	-31	-15	-2	-3	-12	+3	+19
Wales	-29	-31	-35	-5	-17	-68	+8	0	-10	+6	+5	+5	-4	-53	+32	-35	-35
By Size of Firm																	
<115	+17	+2	-16	0	0	+5	-2	-2	-8	+4	-8	+14	+2	+20	-27	+8	+17
115-299	-4	+23	+7	+4	+15	+19	+5	+24	+13	-4	+19	+31	-7	-10	-8	-6	+22
300-599	+55	0	-17	+8	0	0	+22	+33	+25	+29	-11	-13	0	-13	+29	0	+40
600+	0	-21	-6	+18	+37	-35	-75	+25	+50	0	0	0	0	0	+33	-33	-50

Weighted % Balance of Respondents

5 Employment

	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	+32	+30	+27	+18	+28	+2	+21	+41	+14	+16	+14	+11	+6	+1	+20	-1	+17
England	+17	+20	+19	+25	+30	+24	+43	+39	+29	+36	+29	+32	+14	-10	+36	+3	+27
Scotland	+46	+54	+53	+31	+38	-15	-11	+31	-4	-16	-26	-9	-8	+10	-8	-3	-3
Wales	+58	+31	+35	+14	0	-61	+42	+63	+35	+18	+30	0	-12	-23	+32	-20	+7
Other operatives																	
GB	+28	+24	+23	+13	+25	-1	+20	+29	+9	+8	+11	-1	+3	-2	+15	-10	+13
England	+8	+12	+19	+19	+27	+22	+37	+31	+28	+25	+21	+21	+8	-18	+20	-8	+26
Scotland	+50	+46	+43	+18	+29	-25	-10	+28	-8	-27	-31	-31	-4	0	-12	-6	-12
Wales	+54	+42	+26	+36	+14	-50	+33	+44	-5	+18	+70	0	-8	-14	+37	-45	0
Staff																	
GB	+32	+27	+36	+18	+28	+9	+24	+38	+22	+26	+17	+29	+9	+5	+29	+7	+30
England	+12	+20	+30	+21	+30	+42	+43	+40	+35	+18	+24	+49	+5	0	+25	0	+32
Scotland	+54	+40	+59	+31	+27	-22	0	+31	+2	+11	-23	+11	+12	0	-12	+19	+12
Wales	+54	+32	+30	+41	+39	-25	+75	+69	+40	+71	+60	+42	-21	-5	+37	+5	+34
By Size of Firm																	
Skilled operatives																	
<115	+2	-11	+7	0	+13	+14	+4	+15	-7	-15	+7	+5	+2	+9	+12	+3	+11
115-299	+11	+34	+29	+59	+42	+35	+30	+54	0	+14	+30	+18	-3	+27	+13	+5	+18
300-599	+45	+67	+17	+38	+20	+33	+44	+75	+78	+43	+10	0	+11	0	+25	-10	+13
600+	+54	+31	+35	-13	+28	-22	0	+50	0	+50	0	+33	+25	-67	+33	0	+50
Other operatives																	
<115	0	-9	+7	-2	+5	+2	+7	+9	-11	-13	-11	-2	+6	+16	0	-5	+6
115-299	+15	+14	+23	+38	+33	+30	+23	+27	-4	+7	+26	0	-6	+19	-7	+5	+11
300-599	+45	+58	-25	+31	+25	+33	+50	+75	+67	+29	+10	0	0	-10	+38	-20	+13
600+	+43	+31	+35	-5	+28	-24	0	+50	0	+33	+33	0	+25	-67	+33	-25	+50
Staff																	
<115	+14	0	+15	-2	+3	+6	+18	+20	+7	-2	+2	+7	+6	+19	-6	+17	+30
115-299	+22	+24	+29	+50	+42	+39	+28	+41	+11	+36	+22	+29	-3	+14	+7	0	+14
300-599	+45	+55	+17	+38	+30	+56	+44	+75	+78	+29	+20	+13	+22	0	+38	+10	+50
600+	+41	+31	+51	-5	+28	-15	0	+50	0	+67	+33	+100	+25	-33	+100	0	+50

Weighted % Balance of Respondents

6 Expected Employment

	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	+44	+42	+24	+24	+27	+12	+13	+28	+29	+37	+28	+29	+9	+11	+15	+10	+26
England	+66	+52	+40	+54	+48	+26	+15	+28	+45	+36	+45	+15	+6	+24	+5	+13	+38
Scotland	+30	+51	+30	-15	-2	-29	-33	+3	+8	+11	-6	+4	+8	-10	-12	+3	+21
Wales	+8	+15	-43	+14	-11	-25	+42	+25	+35	+76	+70	+55	+25	+10	+37	-15	-27
Employment of staff																	
GB	+39	+39	+30	+19	+40	+15	+14	+28	+21	+35	+28	+25	+12	+19	+20	+11	+20
England	+53	+52	+47	+51	+62	+28	+19	+27	+44	+37	+42	+15	+1	+26	+13	+14	+28
Scotland	+34	+44	+24	-12	+2	-27	-22	+13	-13	+11	-9	+7	+17	0	-8	+3	+24
Wales	-4	+19	-39	+18	+33	-11	+42	+25	+30	+65	+70	+25	+25	0	+37	-15	-18
By Size of Firm																	
Operative jobs																	
<115	+31	+16	+18	+13	+10	+14	+17	+11	+6	+14	+14	+24	+11	+24	-9	+8	+20
115-299	+19	+36	+26	+29	+34	+43	+16	+38	+27	+21	+52	+41	+3	+5	+7	+16	+44
300-599	+73	+50	-50	+15	+11	0	+33	+67	+67	+71	+22	+38	0	+11	+14	+30	+14
600+	+50	+53	+42	+33	+37	+3	-25	+25	+33	+75	0	0	+33	0	+67	-25	0
Employment of staff																	
<115	+21	+14	+13	+13	+13	+16	+3	+7	+2	+16	+12	+24	+9	+15	-6	+8	+24
115-299	+20	+39	+19	+25	+28	+52	+33	+42	+27	+21	+48	+35	0	+29	+21	+21	+32
300-599	+45	+50	-50	+15	+33	+11	+33	+67	+33	+71	+33	+25	+25	+22	+14	+30	0
600+	+54	+44	+59	+21	+65	+3	-25	+25	+33	+67	0	0	+33	0	+67	-25	0

Weighted % Balance of Respondents

7 Costs*

	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	+0	0	0	0	0	0	0	+1	+1	0	0	0	0	0	+1	0
Unchanged	+2	+5	+7	+12	+1	+1	+1	0	+2	+1	+6	0	+2	+1	0	0	+3
Slower	+13	+15	+19	+18	+9	+15	+15	+18	+11	+12	+12	+11	+10	+7	+13	+18	+11
Same rate	+71	+71	+54	+59	+74	+70	+71	+69	+81	+79	+72	+86	+85	+86	+81	+79	+82
Faster	+14	+8	+19	+11	+16	+14	+14	+13	+5	+7	+9	+3	+3	+5	+6	+2	+5
Cost Balances																	
By Country																	
GB	+83	+74	+67	+58	+88	+84	+84	+82	+82	+84	+75	+89	+86	+91	+87	+80	+84
England	+90	+81	+82	+60	+90	+90	+75	+71	+88	+83	+82	+85	+79	+87	+76	+65	+82
Scotland	+82	+98	+85	+79	+93	+94	+91	+97	+71	+73	+72	+91	+96	+93	+92	+91	+91
Wales	+96	+50	+4	+18	+67	+57	+100	+100	+85	+100	+95	+90	+92	+95	+100	+90	+79
By Size of Firm																	
<115	+76	+68	+74	+63	+80	+81	+84	+83	+74	+83	+81	+74	+78	+84	+74	+74	+79
115-299	+81	+68	+67	+69	+79	+74	+78	+79	+82	+82	+82	+94	+79	+95	+93	+80	+82
300-599	+82	+92	+50	+69	+90	+89	+100	+100	+100	+100	+80	+100	+100	+90	+88	+90	+88
600+	+88	+72	+68	+41	+100	+87	+75	+75	+75	+75	+33	+100	+100	+100	+100	+75	+100

* 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	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+47	+46	+39	+45	+47	+50	+53	+49	+36	+58	+52	+60	+46	+39	+62	+39	+29
England	+61	+56	+53	+45	+53	+55	+52	+51	+55	+75	+72	+52	+57	+31	+60	+56	+34
Scotland	+23	+54	+39	+63	+45	+51	+51	+38	+4	+19	+13	+32	+17	+22	+27	+13	+19
Wales	+42	+27	+4	+18	-11	+32	+92	+63	+45	+71	+90	+90	+46	+64	+95	+32	+11
By Size of Firm																	
<115	+35	+20	+33	+28	+16	+36	+29	+38	+22	+27	+41	+46	+43	+26	+26	+25	+24
115-299	+27	+31	+23	+48	+48	+39	+58	+48	+27	+50	+63	+59	+50	+33	+73	+42	+11
300-599	+55	+67	+33	+69	+60	+44	+78	+100	+89	+86	+70	+88	+50	+67	+63	+60	+63
600+	+62	+56	+51	+36	+54	+61	+50	+50	0	+100	0	+50	+33	+33	+100	+25	+50
R&M																	
By Country																	
GB	+40	+27	+25	+46	+41	+37	+46	+42	+27	+43	+39	+47	+36	+38	+52	+40	+23
England	+63	+39	+29	+62	+46	+33	+41	+43	+37	+49	+53	+44	+39	+27	+28	+49	+31
Scotland	+23	+44	+33	+60	+42	+46	+38	+21	-12	+15	+10	+27	+15	+30	+42	+25	+29
Wales	+17	-15	+13	0	-11	+46	+83	+63	+45	+59	+85	+75	+50	+55	+84	+21	0
By Size of Firm																	
<115	+39	+17	+26	+30	+19	+14	+20	+31	+19	+24	+32	+36	+38	+23	+16	+25	+21
115-299	+32	+24	+21	+33	+30	+38	+52	+42	+35	+42	+48	+40	+29	+25	+46	+24	+12
300-599	+45	+11	+33	+54	+60	+44	+67	+67	+75	+86	+50	+71	+50	+70	+63	+70	+67
600+	+43	+38	+25	+58	+50	+43	+50	+50	-25	+33	0	+50	+33	+33	+100	+33	0

Weighted % Balance of Respondents

9 Supply of Resources Required	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4
Skilled Operatives																	
GB	43	43	34	34	32	30	38	41	36	41	42	50	39	32	44	40	52
England	49	44	38	39	25	39	36	31	37	39	40	63	40	32	42	45	52
Scotland	45	51	49	32	55	40	24	38	42	51	49	46	44	45	46	53	63
Wales	21	27	17	45	0	7	67	69	0	29	0	15	38	9	0	10	36
Other Operatives																	
GB	14	14	17	12	19	7	21	25	15	20	30	18	26	16	11	16	15
England	14	11	16	12	14	12	15	16	11	15	26	15	19	8	16	22	18
Scotland	4	20	23	15	37	3	16	31	23	32	33	33	35	33	19	13	19
Wales	13	0	17	5	0	0	33	25	0	24	0	5	33	5	0	5	11
Staff																	
GB	40	38	43	32	37	24	33	19	24	29	38	30	31	33	26	28	30
England	44	44	54	30	35	31	30	18	32	32	33	33	12	31	22	36	19
Scotland	41	37	43	38	36	21	22	25	19	27	44	25	54	48	23	25	38
Wales	17	8	17	0	22	0	33	0	0	0	0	0	50	9	0	5	32
Plant																	
GB	7	3	2	6	6	1	6	3	4	1	4	4	2	2	4	4	3
England	1	3	2	4	3	1	5	5	8	1	7	0	3	2	2	9	0
Scotland	9	2	5	5	8	2	0	0	0	0	3	14	0	3	0	0	3
Wales	8	8	0	23	22	0	0	0	0	6	0	0	4	0	0	0	0
Materials and Products																	
GB	7	7	4	5	6	3	1	8	1	5	8	6	1	7	1	10	1
England	5	3	1	9	5	5	2	10	3	4	10	4	0	13	0	8	2
Scotland	2	9	15	2	8	3	0	9	0	3	13	11	0	3	4	0	0
Wales	0	0	0	0	0	0	0	0	0	0	0	0	4	5	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 2019 Q4 survey totalled 97. 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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