Workload Trends 2020 Q2

Full impact of COVID-19 felt across Great Britain in Q2

Weighted Balances (%)

Change on 12 Months Ago	
Workload	
2019 Q2	+5
2020 Q2	-43
Tender Prices	
New Work	
2019 Q2	+62
2020 Q2	+20
R&M Work	
2019 Q2	+52
2020 Q2	+17
Order Books	
2019 Q2	+15
2020 Q2	-32
Over the Next 12 Months	
Expected Workload	
2019 Q2	+13
2020 Q2	+15
Expected Orders	
New Work	
2019 Q2	+18
2020 Q2	+11
R&M Work	
2019 Q2	+4
2020 Q2	+14

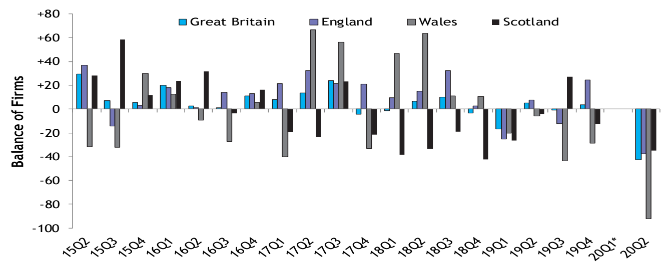
- Workloads declined in Q2, according to 43% of British firms, the lowest balance in nearly 11 years.
- 8 of the 10 sectors saw workloads decline, with airports (-81%) and harbours and waterways (-45%) both reporting survey-record low balances.
- Order books fell for 32% of firms on balance, but 15% expect increased workloads during the next 12 months.
- Employment balances for all types of worker hit a decade-low in Q2, but expectations remained positive.
- 14% of British firms noted issues with the supply of materials/products, the highest proportion in six years.

Change in Workloads and Order Books - Great Britain

*The survey was not run in 2020 Q1 due to COVID-19

Trends in Workload

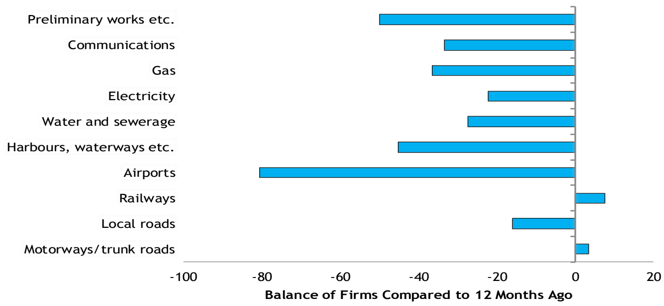
Workloads Compared to 12 Months Ago



*The survey was not run in 2020 Q1 due to COVID-19

Workloads fell, on balance, across Britain in Q2, illustrating the full impact of the coronavirus and associated containment measures. On balance, 43% of firms, reported a decrease in workloads on a year ago, the weakest balance since 2010 Q1. Overall, 57% of the respondents reported that workloads had fallen, and 28% of the respondents reported that workloads were unchanged. For England, 38% of firms, on balance, reported a decrease in workloads in Q2, the lowest balance in eight years. In Scotland, workloads declined in Q2, according to 35% of firms, on balance. Similarly, in Wales, 92% of firms, on balance, reported a decrease in workloads in Q2. This marked the lowest balance since records began in 2005 Q1.

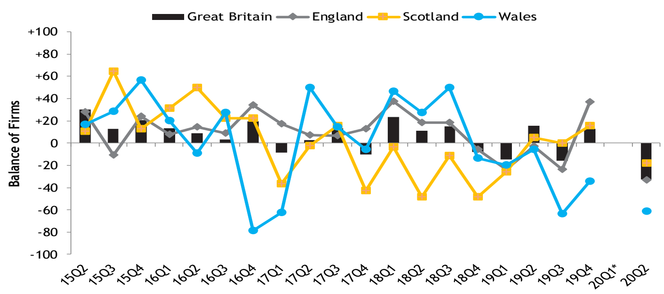
Workload — By Type of Work (GB)



8 out of 10 sectors in Great Britain reported that workloads fell compared to a year earlier, on balance, in the second quarter of 2020. Workloads in airports and harbours and waterways declined in Q2, according to a balance of 81% and 45% of firms respectively. Both balances were the lowest in the survey's history. For preliminary works, half of firms reported a fall in workloads, the lowest balance since 2009 Q4, whilst in gas, a balance of 36% reported a decline. Communications (-33%), water and sewerage (-27%), electricity (-22%) and local roads (-16%) also reported negative balances in Q2. Meanwhile, the two sectors that experienced an increase in workloads compared to a year earlier, on balance, were railways (8%) and motorways/trunk roads (3%).

Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



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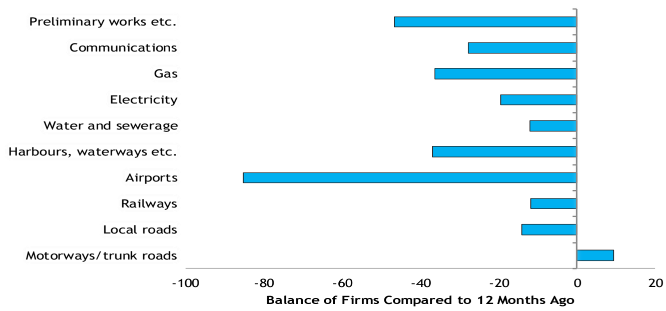
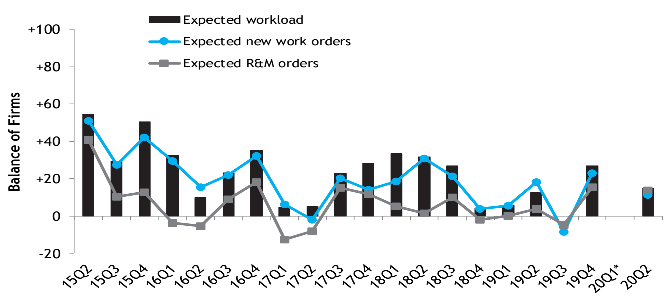
Civil engineering contractors reported that order books fell across Great Britain in the second quarter of 2020. On balance, 32% of firms reported a decrease in orders compared to a year earlier, the lowest balance in nine years. Approximately half of firms (52%) reported that orders had decreased and 28% of firms reported that they were unchanged. In England, one-third of firms, on balance, reported a decline in orders in Q2, which marked the weakest balance since 2011 Q3. Overall, 49% of firms reported that orders had fallen and 35% reported that they were unchanged. Similarly, 18% of firms in Scotland and 62% of firms in Wales reported that order books had decreased compared to a year earlier, on balance.

Order Books — By Type of Work (GB)



In Q2, nine sectors experienced a fall in order books compared to 12 months ago, on balance. The sector that reported the largest negative balance in Q2 was airports, with 85% of firms reporting a decline in orders. This was the lowest balance on record. In preliminary works, 47% of firms, on balance, reported a fall in orders, the weakest balance since 2009 Q4, whilst gas (-36%), communications (-28%) and electricity (-19%) all recorded the lowest balances in nearly one year. Negative balances were also registered in harbours and waterways (-37%), local roads (-14%), railways (-12%) and water and sewerage (-12%). Motorways/trunk roads was the sole sector reporting an increase in order books in Q2, according to 9% of firms, on balance.

Expected Future Trends in the Next 12 Months

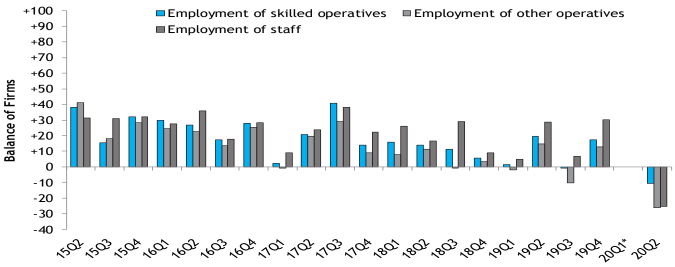


*The survey was not run in 2020 Q1 due to COVID-19

On balance, 15% of firms in Great Britain reported that workloads are expected to increase in the next 12 months. In England, this figure was 24% and in Wales, 67% of firms, on balance, expected workloads to increase, the highest balance since 2018 Q2. However, in Scotland, 26% of firms, on balance, expected workloads to fall over the next 12 months. For new work orders, 11% of British firms expected an increase in the next 12 months, on balance. By nation; England (25%), Wales (60%) and Scotland (-39%). For R&M orders, 14% of British firms, on balance, expected an increase during the next 12 months. By nation; England (13%), Scotland (5%) and Wales (79%). For Wales, this was the highest balance since records began in 2005 Q1.

Trends in Employment

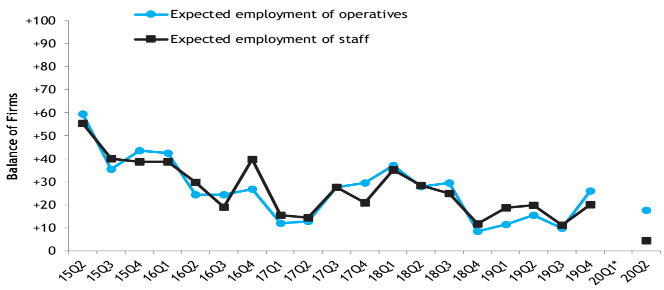
Employment Compared to 12 months Ago (GB)



*The survey was not run in 2020 Q1 due to COVID-19

Employment fell across all nations in Q2, most likely due to the use of the furlough scheme. In Britain, employment of other operatives, staff and skilled operatives fell according to 26%, 25% and 10% of firms respectively, the lowest balances in a decade. In England, employment of staff fell according to 20% of firms, the lowest balance in 10 years, whilst employment of other operatives and skilled operatives fell, according to a balance of 14% and 3% of firms respectively. In Wales, balances were negative across all three types; -79% for other operatives (lowest since 2010 Q3), -60% for skilled operatives and –47% for staff (lowest since 2011 Q4). Similarly in Scotland; -43% for staff, -39% for other operatives and –22% for skilled operatives. The former two balances were the lowest since 2011.

Expected Employment in the Next 12 Months

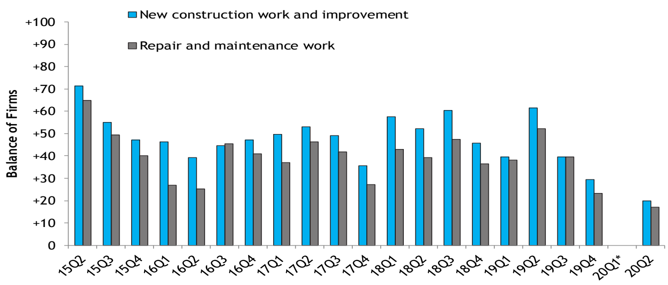


*The survey was not run in 2020 Q1 due to COVID-19

Looking at employment expectations for the next 12 months, on balance, 18% of firms in Britain expected the employment of operatives to increase, and for staff, a balance of only 4% was recorded, the lowest since 2012 Q4. In England, 31% and 13% of firms, on balance, anticipated a rise in operatives and staff employment, respectively. In Wales, on balance, 71% of respondents expected employment to increase for staff and 67% for operatives. However, in Scotland, hiring intentions were downbeat in Q2, with 43% and 39% of firms expecting the employment of staff and operatives, respectively, to decrease over the next 12 months. Both balances were the lowest in a decade.

Trends in Costs, Tender Prices and Supply Constraints

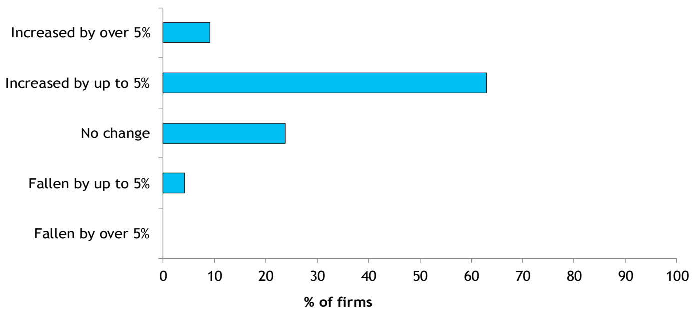
Tender Prices Compared to 12 Months Ago (GB)



*The survey was not run in 2020 Q1 due to COVID-19

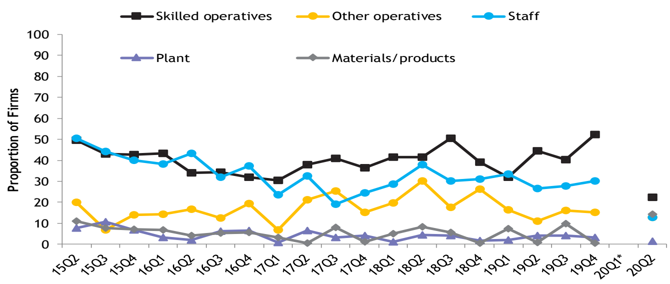
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 20% of firms for new construction work and improvement, and 17% for repair and maintenance work. Both balances were the lowest in nearly seven years. In England, 18% of firms, on balance, reported higher tender prices for new construction work and improvement, the lowest balance since 2013 Q1, and 14% for repair and maintenance, the lowest since 2013 Q3. In Scotland, 26% of respondents reported an increase in tender prices for new construction work and improvement, and 39% for repair and maintenance, on balance. In Wales, one-third of respondents reported an increase in tender prices for new construction work and improvement and 21% for repair and maintenance, on balance.

Costs Compared with 12 Months Ago (GB)



In Q2, 63% of firms in Great Britain reported that costs increased by up to 5% compared to 12 months earlier, 9% reported increases of over 5%, whilst 4% reported decreases. Overall, 68% of firms, on balance, reported an increase in costs, the lowest balance in four years. In England, 59% of firms, on balance, reported an increase in costs, the lowest balance since 2012 Q2. 3% of firms reported rises of over 5%, 63% by up to 5%, whilst 7% of firms reported decreases. In Scotland, costs increased, on balance, according to 87% of firms with 22% of firms reporting increases of over 5%, 65% by up to 5%, whilst no firms reported decreases. In Wales, 93% of firms, on balance, reported an increase in costs over the last 12 months, with 93% of firms reporting increases by up to 5%. No firms in Wales reported that prices had decreased in Q2.

Contractors Unsatisfied with Supply (GB)



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Overall, civil engineering firms reported continued difficulties with the supply of suitable workers in Q2. In Great Britain, 23% and 14% of respondents reported dissatisfactory supply of skilled operatives and materials/products, respectively. For materials/products, this was the highest proportion in six years. 13% of firms also reported dissatisfaction with the supply of both other operatives and staff, whilst only 1% cited issues with the supply of plant. The most commonly reported dissatisfaction with supply in Q2 was for skilled operatives in England (28%), Scotland (22%) and Wales (13%). 18% of firms in England were also dissatisfied with the supply of staff, whilst 18% of firms in Scotland cited other operatives as another concern. In Wales, the availability of materials/products was noted as another concern, according to 13% of firms.

Workload Trends Survey

1 Workload

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
Compared with 12 Months Ago																	
By Country																	
GB	+2	+1	+11	+8	+13	+24	-4	-1	+6	+10	-3	-17	+5	-1	+3		-43
England	+1	+14	+13	+21	+32	+22	+21	+9	+15	+33	+3	-25	+7	-13	+25		-38
Scotland	+32	-4	+16	-20	-24	+23	-21	-38	-33	-19	-42	-26	-4	+27	-13		-35
Wales	-9	-27	+6	-40	+67	+56	-33	+47	+64	+11	+11	-20	-6	-44	-29		-92
By Size of Firm																	
<115	-6	+2	+3	+19	0	+17	-20	-26	-2	+8	+3	+8	0	+3	-6		-42
115-299	0	+30	+16	+45	+32	+29	+4	-8	+22	+19	-3	-11	-8	-5	+16		-40
300-599	0	-9	+25	+25	+13	+75	+57	0	0	-13	-13	-20	0	0	0		-36
600+	+7	-13	+5	-18	0	0	-100	+67	0	+50	0	-67	+50	0	0		-100
By Type of Work																	
Motorways & trunk roads	-11	-21	-4	-14	-15	+5	-10	+8	-10	-13	+6	+2	-1	+3	-6		+3
Local roads	-11	-27	-13	-22	-16	-19	-24	-15	-21	-21	-15	-27	-1	-2	-18		-16
Railways	+13	-2	-30	-1	-8	-38	-32	+4	-13	-13	-28	-20	+11	-8	+9		+8
Airports	-9	+3	-18	+5	+17	+8	0	+22	+19	-9	-7	-37	+30	-24	-13		-81
Harbours, waterways etc.	-26	-32	-23	-12	-5	-1	-28	-15	+9	+4	+8	-21	-19	-37	-35		-45
Water & sewerage	-19	-7	+1	-16	-10	-6	+1	-14	+10	-1	-13	-19	+36	-44	-11		-27
Electricity	+28	-7	+8	-16	-16	+24	-8	+11	+12	+12	-33	-46	+14	-3	-10		-22
Gas	-75	+21	+14	+29	+57	+57	+6	0	+42	-58	-11	+6	-53	-31	-28		-36
Communications	+42	+14	+13	-54	-21	+33	+28	0	+21	-13	+15	+54	-22	+57	0		-33
Preliminary works, etc.	+19	+9	+26	+37	+11	+12	+10	+3	+2	+3	-9	-8	-25	-22	-20		-50

Weighted % Balance of Respondents

2 Expected Workload

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
In the Next 12 Months																	
By Country																	
GB	+10	+23	+35	+5	+5	+23	+28	+33	+32	+27	+4	+6	+13	0	+27		+15
England	+26	+50	+60	+31	+16	+20	+50	+34	+48	+25	+7	+17	+18	+8	+39		+24
Scotland	+19	-20	-2	-51	-49	+6	-4	+3	-20	-11	-4	-21	-38	-6	+27		-26
Wales	-52	+18	-11	-68	+42	+25	+35	+71	+70	+60	+13	+5	+37	-15	-32		+67
By Size of Firm																	
<115	+8	+9	+16	+9	+10	+11	+6	+8	+8	+17	-2	+19	-12	+5	+20		-8
115-299	+16	+32	+48	+48	+20	+38	+23	+25	+48	+53	0	0	0	+11	+46		+13
300-599	-50	+8	0	+11	+22	+67	+67	+71	+33	+25	+25	0	+14	+20	+14		+9
600+	+20	+33	+51	-14	-50	0	+33	+67	+50	0	0	0	+67	-50	0		+100

Weighted % Balance of Respondents

3 Order Books

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
Compared with 12 Months Ago																	
By Country																	
GB	+9	+3	+19	-9	+3	+13	-10	+24	+11	+15	-8	-15	+15	-16	+13		-32
England	+14	+9	+34	+17	+7	+7	+13	+38	+18	+18	-6	-24	-3	-24	+37		-33
Scotland	+50	+23	+23	-37	-3	+15	-43	-3	-48	-12	-48	-26	+5	0	+16		-18
Wales	-9	+27	-79	-63	+50	+14	-6	+46	+27	+50	-14	-20	-6	-64	-35		-62
By Size of Firm																	
<115	-9	-14	+6	+6	+2	+9	-23	-14	+7	-3	-3	+6	-8	-13	+2		-28
115-299	+13	+5	+22	+38	+27	+29	-10	+40	+27	+13	-8	-18	0	-8	+25		-16
300-599	0	+8	0	+40	+43	+67	+29	0	-25	0	-50	0	-13	-33	+14		-40
600+	+16	+9	+34	-43	-75	-33	-33	+100	+100	+100	+50	-67	+100	0	0		-100
By Type of Work																	
Motorways & trunk roads	-24	-23	+7	-14	-5	0	+2	-3	-2	-10	-16	+4	+4	-14	0		+9
Local roads	-17	-41	-25	-31	-11	-19	-29	-33	-23	-26	-22	-19	+8	-18	-22		-14
Railways	+3	-15	-7	-17	-37	-17	-30	+31	-19	+20	+16	-10	+5	-29	+14		-12
Airports	+8	-16	-2	-14	-6	+12	-14	0	-4	-13	-23	-59	+33	0	-15		-85
Harbours, waterways etc.	-13	-28	-24	-15	+5	+4	-9	-8	+5	-4	+9	-32	-26	-48	-25		-37
Water & sewerage	-2	-11	+4	-10	-25	-10	+1	-14	+1	-5	-30	-22	+23	-44	-5		-12
Electricity	+26	+3	-2	+4	-27	+31	-14	+15	0	+7	-25	-45	-21	-3	0		-19
Gas	-75	+23	+19	+36	+18	+53	-13	-6	+57	-67	-32	-7	-53	-20	-32		-36
Communications	+24	+4	+9	-71	+33	+33	+4	-5	+8	-11	+19	+7	-30	+50	+24		-28
Preliminary works, etc.	-1	+14	+17	+23	+26	+4	+4	+1	+8	-9	-34	-18	-15	-24	-24		-47

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
In the Next 12 Months																	
New Work																	
By Country																	
GB	+16	+22	+32	+6	-2	+20	+14	+19	+31	+21	+4	+6	+18	-8	+23		+11
England	+42	+48	+57	+40	+3	+20	+36	+13	+49	+21	+10	+21	+21	+3	+33		+25
Scotland	+8	-12	-12	-52	-42	+6	-23	0	-26	-18	-6	-18	-46	-25	+30		-39
Wales	-57	+14	-11	-68	+42	0	+25	+18	+70	+45	0	-10	+37	-15	-32		+60
By Size of Firm																	
<115	0	-4	+21	+2	+5	+7	+2	+2	+10	+7	-13	+14	-15	-5	+16		-16
115-299	+10	+18	+34	+48	+16	+42	+12	+14	+44	+35	+6	+5	0	0	+39		0
300-599	-67	+31	0	0	+22	+33	+44	+71	+33	+38	+25	0	+14	+10	+14		+18
600+	+42	+33	+51	-6	-75	0	0	0	+50	0	0	0	+100	-50	0		+100
R&M																	
By Country																	
GB	-6	+9	+18	-13	-8	+15	+12	+5	+1	+10	-2	0	+4	-5	+15		+14
England	+11	+41	+40	+8	-10	+18	+30	+1	+20	+17	+2	+15	+9	-2	+26		+13
Scotland	-16	-14	-14	-43	-18	+7	0	-3	-31	-15	-2	-3	-12	+3	+19		+5
Wales	-35	-5	-17	-68	+8	0	-10	+6	+5	+5	-4	-53	+32	-35	-35		+79
By Size of Firm																	
<115	-16	0	0	+5	-2	-2	-8	+4	-8	+14	+2	+20	-27	+8	+17		-12
115-299	+7	+4	+15	+19	+5	+24	+13	-4	+19	+31	-7	-10	-8	-6	+22		0
300-599	-17	+8	0	0	+22	+33	+25	+29	-11	-13	0	-13	+29	0	+40		+18
600+	-6	+18	+37	-35	-75	+25	+50	0	0	0	0	0	+33	-33	-50		+100

Weighted % Balance of Respondents

**Please note that the Workload Trends Survey was not run in 2020 Q1 due to the impact of the coronavirus (COVID-19) on the response rate.

5 Employment

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	+27	+18	+28	+2	+21	+41	+14	+16	+14	+11	+6	+1	+20	-1	+17		-10
England	+19	+25	+30	+24	+43	+39	+29	+36	+29	+32	+14	-10	+36	+3	+27		-3
Scotland	+53	+31	+38	-15	-11	+31	-4	-16	-26	-9	-8	+10	-8	-3	-3		-22
Wales	+35	+14	0	-61	+42	+63	+35	+18	+30	0	-12	-23	+32	-20	+7		-60
Other operatives																	
GB	+23	+13	+25	-1	+20	+29	+9	+8	+11	-1	+3	-2	+15	-10	+13		-26
England	+19	+19	+27	+22	+37	+31	+28	+25	+21	+21	+8	-18	+20	-8	+26		-14
Scotland	+43	+18	+29	-25	-10	+28	-8	-27	-31	-31	-4	0	-12	-6	-12		-39
Wales	+26	+36	+14	-50	+33	+44	-5	+18	+70	0	-8	-14	+37	-45	0		-79
Staff																	
GB	+36	+18	+28	+9	+24	+38	+22	+26	+17	+29	+9	+5	+29	+7	+30		-25
England	+30	+21	+30	+42	+43	+40	+35	+18	+24	+49	+5	0	+25	0	+32		-20
Scotland	+59	+31	+27	-22	0	+31	+2	+11	-23	+11	+12	0	-12	+19	+12		-43
Wales	+30	+41	+39	-25	+75	+69	+40	+71	+60	+42	-21	-5	+37	+5	+34		-47
By Size of Firm																	
Skilled operatives																	
<115	+7	0	+13	+14	+4	+15	-7	-15	+7	+5	+2	+9	+12	+3	+11		-3
115-299	+29	+59	+42	+35	+30	+54	0	+14	+30	+18	-3	+27	+13	+5	+18		-4
300-599	+17	+38	+20	+33	+44	+75	+78	+43	+10	0	+11	0	+25	-10	+13		-27
600+	+35	-13	+28	-22	0	+50	0	+50	0	+33	+25	-67	+33	0	+50		0
Other operatives																	
<115	+7	-2	+5	+2	+7	+9	-11	-13	-11	-2	+6	+16	0	-5	+6		-18
115-299	+23	+38	+33	+30	+23	+27	-4	+7	+26	0	-6	+19	-7	+5	+11		-22
300-599	-25	+31	+25	+33	+50	+75	+67	+29	+10	0	0	-10	+38	-20	+13		-45
600+	+35	-5	+28	-24	0	+50	0	+33	+33	0	+25	-67	+33	-25	+50		0
Staff																	
<115	+15	-2	+3	+6	+18	+20	+7	-2	+2	+7	+6	+19	-6	+17	+30		-15
115-299	+29	+50	+42	+39	+28	+41	+11	+36	+22	+29	-3	+14	+7	0	+14		-22
300-599	+17	+38	+30	+56	+44	+75	+78	+29	+20	+13	+22	0	+38	+10	+50		-45
600+	+51	-5	+28	-15	0	+50	0	+67	+33	+100	+25	-33	+100	0	+50		0

Weighted % Balance of Respondents

6 Expected Employment

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	+24	+24	+27	+12	+13	+28	+29	+37	+28	+29	+9	+11	+15	+10	+26		+18
England	+40	+54	+48	+26	+15	+28	+45	+36	+45	+15	+6	+24	+5	+13	+38		+31
Scotland	+30	-15	-2	-29	-33	+3	+8	+11	-6	+4	+8	-10	-12	+3	+21		-39
Wales	-43	+14	-11	-25	+42	+25	+35	+76	+70	+55	+25	+10	+37	-15	-27		+67
Employment of staff																	
GB	+30	+19	+40	+15	+14	+28	+21	+35	+28	+25	+12	+19	+20	+11	+20		+4
England	+47	+51	+62	+28	+19	+27	+44	+37	+42	+15	+1	+26	+13	+14	+28		+13
Scotland	+24	-12	+2	-27	-22	+13	-13	+11	-9	+7	+17	0	-8	+3	+24		-43
Wales	-39	+18	+33	-11	+42	+25	+30	+65	+70	+25	+25	0	+37	-15	-18		+71
By Size of Firm																	
Operative jobs																	
<115	+18	+13	+10	+14	+17	+11	+6	+14	+14	+24	+11	+24	-9	+8	+20		-3
115-299	+26	+29	+34	+43	+16	+38	+27	+21	+52	+41	+3	+5	+7	+16	+44		+17
300-599	-50	+15	+11	0	+33	+67	+67	+71	+22	+38	0	+11	+14	+30	+14		+9
600+	+42	+33	+37	+3	-25	+25	+33	+75	0	0	+33	0	+67	-25	0		+100
Employment of staff																	
<115	+13	+13	+13	+16	+3	+7	+2	+16	+12	+24	+9	+15	-6	+8	+24		-22
115-299	+19	+25	+28	+52	+33	+42	+27	+21	+48	+35	0	+29	+21	+21	+32		+9
300-599	-50	+15	+33	+11	+33	+67	+33	+71	+33	+25	+25	+22	+14	+30	0		-9
600+	+59	+21	+65	+3	-25	+25	+33	+67	0	0	+33	0	+67	-25	0		+100

Weighted % Balance of Respondents

7 Costs*

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	0	0	0	0	+1	+1	0	0	0	0	0	+1	0		0
Unchanged	+7	+12	+1	+1	+1	0	+2	+1	+6	0	+2	+1	0	0	+3		+4
Slower	+19	+18	+9	+15	+15	+18	+11	+12	+12	+11	+10	+7	+13	+18	+11		+24
Same rate	+54	+59	+74	+70	+71	+69	+81	+79	+72	+86	+85	+86	+81	+79	+82		+63
Faster	+19	+11	+16	+14	+14	+13	+5	+7	+9	+3	+3	+5	+6	+2	+5		+9
Cost Balances																	
By Country																	
GB	+67	+58	+88	+84	+84	+82	+82	+84	+75	+89	+86	+91	+87	+80	+84		+68
England	+82	+60	+90	+90	+75	+71	+88	+83	+82	+85	+79	+87	+76	+65	+82		+59
Scotland	+85	+79	+93	+94	+91	+97	+71	+73	+72	+91	+96	+93	+92	+91	+91		+87
Wales	+4	+18	+67	+57	+100	+100	+85	+100	+95	+90	+92	+95	+100	+90	+79		+93
By Size of Firm																	
<115	+74	+63	+80	+81	+84	+83	+74	+83	+81	+74	+78	+84	+74	+74	+79		+69
115-299	+67	+69	+79	+74	+78	+79	+82	+82	+82	+94	+79	+95	+93	+80	+82		+52
300-599	+50	+69	+90	+89	+100	+100	+100	+100	+80	+100	+100	+90	+88	+90	+88		+73
600+	+68	+41	+100	+87	+75	+75	+75	+75	+33	+100	+100	+100	+100	+75	+100		+100

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

**Please note that the Workload Trends Survey was not run in 2020 Q1 due to the impact of the coronavirus (COVID-19) on the response rate.

8 Tender Prices

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+39	+45	+47	+50	+53	+49	+36	+58	+52	+60	+46	+39	+62	+39	+29		+20
England	+53	+45	+53	+55	+52	+51	+55	+75	+72	+52	+57	+31	+60	+56	+34		+18
Scotland	+39	+63	+45	+51	+51	+38	+4	+19	+13	+32	+17	+22	+27	+13	+19		+26
Wales	+4	+18	-11	+32	+92	+63	+45	+71	+90	+90	+46	+64	+95	+32	+11		+33
By Size of Firm																	
<115	+33	+28	+16	+36	+29	+38	+22	+27	+41	+46	+43	+26	+26	+25	+24		+24
115-299	+23	+48	+48	+39	+58	+48	+27	+50	+63	+59	+50	+33	+73	+42	+11		+17
300-599	+33	+69	+60	+44	+78	+100	+89	+86	+70	+88	+50	+67	+63	+60	+63		+9
600+	+51	+36	+54	+61	+50	+50	0	+100	0	+50	+33	+33	+100	+25	+50		+50
R&M																	
By Country																	
GB	+25	+46	+41	+37	+46	+42	+27	+43	+39	+47	+36	+38	+52	+40	+23		+17
England	+29	+62	+46	+33	+41	+43	+37	+49	+53	+44	+39	+27	+28	+49	+31		+14
Scotland	+33	+60	+42	+46	+38	+21	-12	+15	+10	+27	+15	+30	+42	+25	+29		+39
Wales	+13	0	-11	+46	+83	+63	+45	+59	+85	+75	+50	+55	+84	+21	0		+21
By Size of Firm																	
<115	+26	+30	+19	+14	+20	+31	+19	+24	+32	+36	+38	+23	+16	+25	+21		+17
115-299	+21	+33	+30	+38	+52	+42	+35	+42	+48	+40	+29	+25	+46	+24	+12		+5
300-599	+33	+54	+60	+44	+67	+67	+75	+86	+50	+71	+50	+70	+63	+70	+67		+18
600+	+25	+58	+50	+43	+50	+50	-25	+33	0	+50	+33	+33	+100	+33	0		+50

Weighted % Balance of Respondents

9 Supply of Resources Required

	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2
Skilled Operatives																	
GB	34	34	32	30	38	41	36	41	42	50	39	32	44	40	52		23
England	38	39	25	39	36	31	37	39	40	63	40	32	42	45	52		28
Scotland	49	32	55	40	24	38	42	51	49	46	44	45	46	53	63		22
Wales	17	45	0	7	67	69	0	29	0	15	38	9	0	10	36		13
Other Operatives																	
GB	17	12	19	7	21	25	15	20	30	18	26	16	11	16	15		13
England	16	12	14	12	15	16	11	15	26	15	19	8	16	22	18		17
Scotland	23	15	37	3	16	31	23	32	33	33	35	33	19	13	19		18
Wales	17	5	0	0	33	25	0	24	0	5	33	5	0	5	11		0
Staff																	
GB	43	32	37	24	33	19	24	29	38	30	31	33	26	28	30		13
England	54	30	35	31	30	18	32	32	33	33	12	31	22	36	19		18
Scotland	43	38	36	21	22	25	19	27	44	25	54	48	23	25	38		13
Wales	17	0	22	0	33	0	0	0	0	0	50	9	0	5	32		0
Plant																	
GB	2	6	6	1	6	3	4	1	4	4	2	2	4	4	3		1
England	2	4	3	1	5	5	8	1	7	0	3	2	2	9	0		2
Scotland	5	5	8	2	0	0	0	0	3	14	0	3	0	0	3		0
Wales	0	23	22	0	0	0	0	6	0	0	4	0	0	0	0		0
Materials and Products																	
GB	4	5	6	3	1	8	1	5	8	6	1	7	1	10	1		14
England	1	9	5	5	2	10	3	4	10	4	0	13	0	8	2		5
Scotland	15	2	8	3	0	9	0	3	13	11	0	3	4	0	0		13
Wales	0	0	0	0	0	0	0	0	0	0	4	5	0	0	0		13

% of Respondents Reporting Unsatisfactory Availability of Resources

**Please note that the Workload Trends Survey was not run in 2020 Q1 due to the impact of the coronavirus (COVID-19) on the response rate.

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

The number of contractors taking part in CECA's 2020 Q2 survey totalled 82. 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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