Workload Trends 2020 Q3

Activity continued to fall during post-lockdown period in Q3

Weighted Balances (%)

2019 Q3	-1
2020 Q3	-15
Tender Prices	
New Work	
2019 Q3	+39
2020 Q3	+15
R&M Work	
2019 Q3	+40
2020 Q3	+14
Order Books	
2019 Q3	-16
2020 Q3	-8
Over the Next 12 Months	
Expected Workload	
2019 Q3	0
2020 Q3	+12
Expected Orders	
New Work	
2019 Q3	-8
2020 Q3	+2
R&M Work	
2019 Q3	-5
2020 Q3	+7

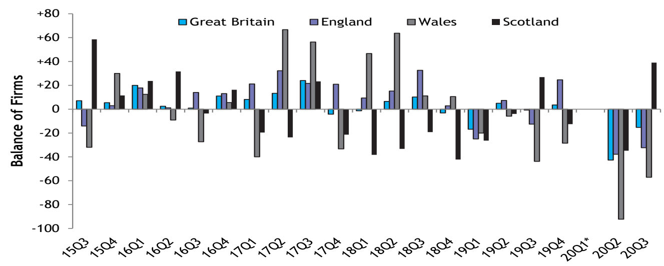
- In Q3, 15% of British firms, on balance, reported a fall in workloads, the second consecutive annual decline.
- 9 of the 10 sectors saw workloads decline, with airports (-86%) reporting a new record-low balance.
- Order books fell for 8% of firms on balance, but 12% expect increased workloads during the next 12 months.
- Hiring for all types of worker fell in annual terms for the second quarter in a row in Q3, but outlook positive.
- Tender price balances for new work and R&M were the lowest in nearly eight years.
- 15% of firms cited issues with the supply of materials/ products, the highest proportion in nearly seven years.

Change in Workloads and Order Books - Great Britain

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

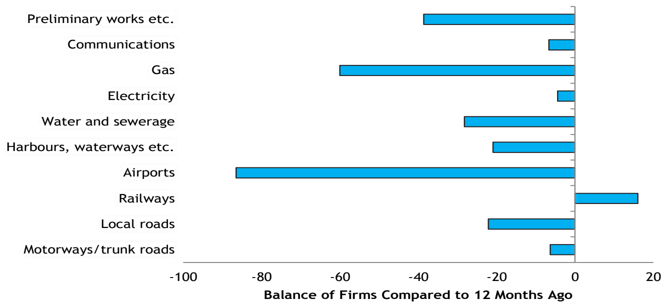
Trends in Workload

Workloads Compared to 12 Months Ago



Despite the easing of lockdown restrictions, annual workloads fell, on balance, across Britain for a second consecutive quarter in Q3. On balance, 15% of firms, reported a decrease in workloads on a year ago, compared to a balance of -43% in Q2, which was the lowest in nearly 11 years. Overall, half of the respondents reported that workloads had fallen, and 34% reported that they had increased. In England, 32% of firms, on balance, reported a fall in workloads, the second consecutive quarter of annual decline. In Wales, 57% of firms, on balance, reported a fall in workloads in Q3, up from a survey-record low balance of -92% in Q2, but signalling the second consecutive quarter of annual decline. After reporting a negative balance (-35%) in Q2, workloads increased in Scotland compared to a year ago, according to 39% of firms, on balance.

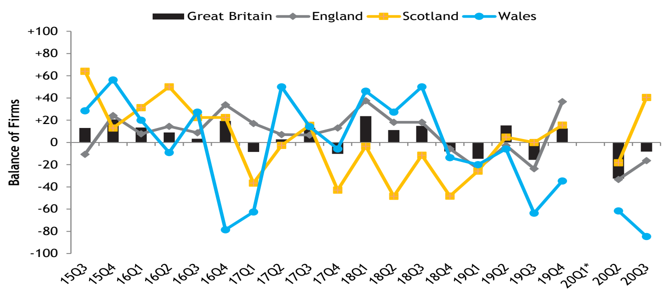
Workload — By Type of Work (GB)



9 out of 10 sectors in Great Britain reported that workloads fell compared to a year earlier, on balance, in Q3. The sector that reported the weakest balance in workloads in Q3 was airports, with 86% of firms reporting an annual fall. This was the lowest balance since records began in 2005 Q1. Gas (-60%), water and sewerage (-28%) and local roads (-22%) all reported negative annual balances for the second consecutive quarter in Q3. For gas, this was the lowest balance in nearly five years. Despite improving from Q2, the annual balances for preliminary works (-39%), harbours and waterways (-21%), communications (-7%) and electricity (-4%) all remained negative in Q3. A negative balance of 6% was also reported for motorways/trunk roads. Meanwhile, railways was the sole sector reporting an increase in workloads in Q3, according to 16% of firms, on balance.

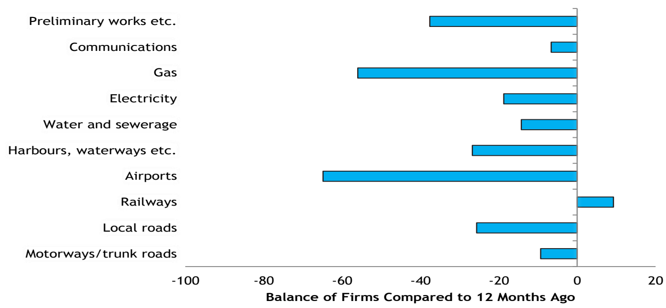
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



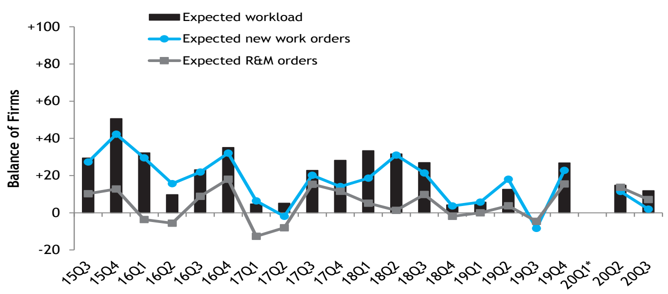
Civil engineering contractors reported that order books in Great Britain fell in annual terms for the second quarter in a row in Q3. Orders declined compared to 12 months ago despite the balance improving to -8% in Q3, from a nine-year low of -32% in Q2. Overall, 44% of firms reported that orders had decreased and 36% of firms reported that they had increased. In England, 16% of firms, on balance, reported a decline in orders in Q3, compared to a balance of -33% in Q2. Overall, 46% of firms reported that orders had fallen and 30% reported that they had risen. In Wales, orders fell on an annual basis for the second consecutive quarter, according to a balance of 85% of firms, the lowest balance since 2010 Q2. After falling in Q2, orders in Scotland increased, on balance, according to 40% of firms. This marked the highest balance since 2016 Q2.

Order Books — By Type of Work (GB)



In Q3, nine sectors experienced a fall in order books compared to 12 months ago, on balance. Airports reported the largest negative balance, with nearly two-thirds (-65%) of firms reporting a decrease in orders, whilst gas (-56%) and local roads (-26%) recorded the lowest balances in almost two years. Although the orders balance for preliminary works (-38%), harbours and waterways (-27%) and communications (-7%) improved from Q2, they all remained in negative territory in Q3. Negative annual balances were also recorded in electricity (-19%), water and sewerage (-14%) and motorways/trunk roads (-9%). Railways was the only sector reporting an increase in order books in Q3, according to 9% of firms, on balance.

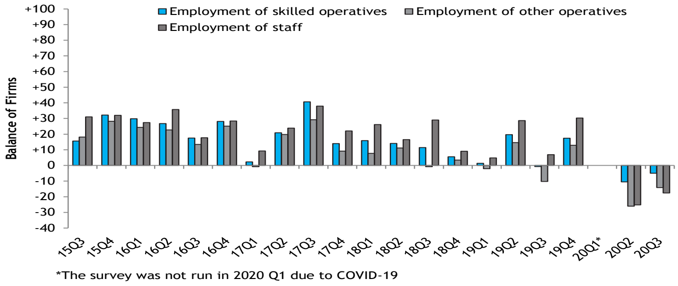
Expected Future Trends in the Next 12 Months



On balance, 12% of firms in Great Britain reported that workloads are expected to increase in the next 12 months. In England, this figure was 28% and in Wales, only 5% of firms, on balance, expected workloads to rise. However, in Scotland, expectations remained weak for a second consecutive quarter, with 17% of the respondents, on balance, expecting a fall in workloads over the next 12 months. For new work orders, only 2% of British firms anticipated an increase in the next 12 months, on balance. By nation; England (30%), Wales (-29%) and Scotland (-36%). For R&M orders, 7% of British firms, on balance, expected an increase during the next 12 months. By nation; England (21%), Scotland (11%) and Wales (-47%).

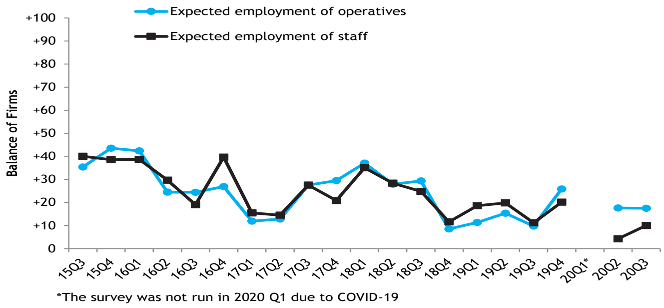
Trends in Employment

Employment Compared to 12 months Ago (GB)



Employment fell in Great Britain for the second consecutive quarter in Q3, as firms continued to use the furlough scheme. In Britain, employment of staff, other operatives and skilled operatives declined according to 18%, 14% and 5% of firms respectively. In England, employment of other operatives, staff and skilled operatives fell according to 33%, 31% and 20% of firms respectively, the lowest balances in a decade. However, in Wales, employment of skilled operatives, other operatives and staff all rose, according to a balance of 5% of firms. This is an improvement from the negative annual balances recorded in Q2. After recording negative balances in Q2, employment of skilled operatives, staff and other operatives in Scotland also increased according to 19%, 15% and 9% of firms respectively.

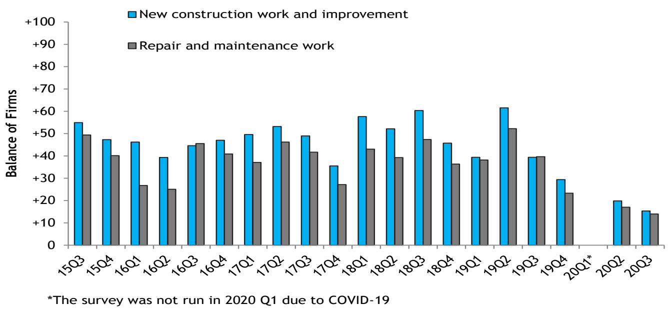
Expected Employment in the Next 12 Months



Looking at employment expectations for the next 12 months, on balance, 18% of firms in Britain expected the employment of operatives to increase and 10% expected the employment of staff to increase. In England, 28% and 14% of firms, on balance, anticipated a rise in operatives and staff employment, respectively. In Wales, on balance, 26% of respondents expected employment to increase for operatives and 16% for staff. Prospects in Scotland improved in Q3 compared to Q2, with 6% of firms expecting the employment of both operatives and staff to increase over the next 12 months.

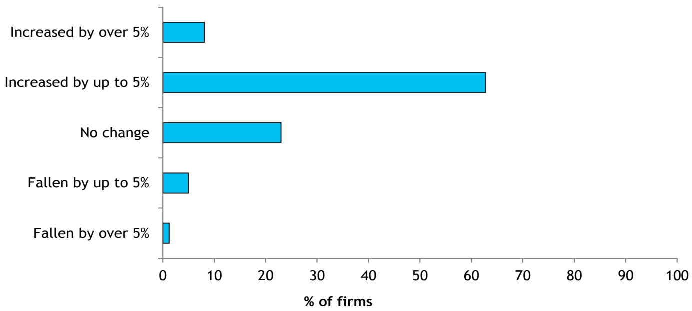
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



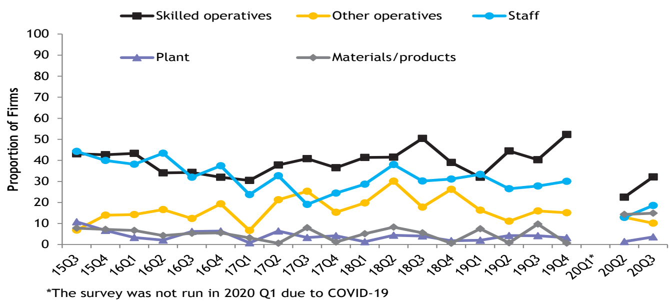
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 15% of firms for new construction work and improvement, and 14% for repair and maintenance work. Both balances were the lowest in nearly eight years. In England, 11% of firms, on balance, reported higher tender prices for new construction work and improvement, the lowest balance since 2013 Q1, and 12% for repair and maintenance, the lowest since 2013 Q3. In Scotland, 20% of respondents, on balance, reported an increase in tender prices for new construction work and improvement, and 22% for repair and maintenance, the lowest balance in two years. In Wales, 28% of firms reported higher tender prices for new construction work and improvement, and only 5% of firms reported higher tender prices for repair and maintenance, on balance.

Costs Compared with 12 Months Ago (GB)



In Q3, 63% of firms in Great Britain reported that costs increased by up to 5% compared to 12 months earlier, 8% reported increases of over 5%, whilst 6% reported decreases. Overall, 65% of firms, on balance, reported an increase in costs, the lowest balance in nearly four years. In England, 54% of firms, on balance, reported an increase in costs, the lowest balance in nearly nine years. 3% of firms reported rises of over 5%, 58% by up to 5%, whilst 7% of firms reported decreases. In Scotland, costs increased, on balance, according to 72% of firms with 15% of firms reporting increases of over 5%, 64% by up to 5%, whilst 6% of firms reported decreases. In Wales, three-quarters of firms, on balance, reported an increase in costs over the last 12 months, the lowest balance since 2017 Q1. 75% of firms reported increases of up to 5%, 10% by over 5%, whilst 10% reported decreases.

Contractors Unsatisfied with Supply (GB)



Overall, civil engineering firms reported continued difficulties with the supply of suitable workers in Q3. In Great Britain, 32% and 19% of respondents reported dissatisfactory supply of skilled operatives and staff, respectively. The percentage reporting dissatisfaction in supply of materials/products was 15% in Q3, up from 14% in Q2 and the highest proportion since 2014 Q2. 10% and 4% of firms also reported dissatisfaction with the supply of other operatives and plant, respectively. The most commonly reported dissatisfaction with supply in Q3 was for skilled operatives in England (28%), Scotland (47%) and Wales (35%). 22% of firms in England were also dissatisfied with the supply of staff, whilst 19% of firms in Scotland cited materials/products as another concern, the highest proportion since 2015 Q3.

Workload Trends Survey

1 Workload

	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3
Compared with 12 Months Ago																	
By Country																	
GB	+1	+11	+8	+13	+24	-4	-1	+6	+10	-3	-17	+5	-1	+3		-43	-15
England	+14	+13	+21	+32	+22	+21	+9	+15	+33	+3	-25	+7	-13	+25		-38	-32
Scotland	-4	+16	-20	-24	+23	-21	-38	-33	-19	-42	-26	-4	+27	-13		-35	+39
Wales	-27	+6	-40	+67	+56	-33	+47	+64	+11	+11	-20	-6	-44	-29		-92	-57
By Size of Firm																	
<115	+2	+3	+19	0	+17	-20	-26	-2	+8	+3	+8	0	+3	-6		-42	-27
115-299	+30	+16	+45	+32	+29	+4	-8	+22	+19	-3	-11	-8	-5	+16		-40	+22
300-599	-9	+25	+25	+13	+75	+57	0	0	-13	-13	-20	0	0	0		-36	-13
600+	-13	+5	-18	0	0	-100	+67	0	+50	0	-67	+50	0	0		-100	-50
By Type of Work																	
Motorways & trunk roads	-21	-4	-14	-15	+5	-10	+8	-10	-13	+6	+2	-1	+3	-6		+3	-6
Local roads	-27	-13	-22	-16	-19	-24	-15	-21	-21	-15	-27	-1	-2	-18		-16	-22
Railways	-2	-30	-1	-8	-38	-32	+4	-13	-13	-28	-20	+11	-8	+9		+8	+16
Airports	+3	-18	+5	+17	+8	0	+22	+19	-9	-7	-37	+30	-24	-13		-81	-86
Harbours, waterways etc.	-32	-23	-12	-5	-1	-28	-15	+9	+4	+8	-21	-19	-37	-35		-45	-21
Water & sewerage	-7	+1	-16	-10	-6	+1	-14	+10	-1	-13	-19	+36	-44	-11		-27	-28
Electricity	-7	+8	-16	-16	+24	-8	+11	+12	+12	-33	-46	+14	-3	-10		-22	-4
Gas	+21	+14	+29	+57	+57	+6	0	+42	-58	-11	+6	-53	-31	-28		-36	-60
Communications	+14	+13	-54	-21	+33	+28	0	+21	-13	+15	+54	-22	+57	0		-33	-7
Preliminary works, etc.	+9	+26	+37	+11	+12	+10	+3	+2	+3	-9	-8	-25	-22	-20		-50	-39

Weighted % Balance of Respondents

2 Expected Workload

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

Weighted % Balance of Respondents

3 Order Books

	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3
Compared with 12 Months Ago																	
By Country																	
GB	+3	+19	-9	+3	+13	-10	+24	+11	+15	-8	-15	+15	-16	+13		-32	-8
England	+9	+34	+17	+7	+7	+13	+38	+18	+18	-6	-24	-3	-24	+37		-33	-16
Scotland	+23	+23	-37	-3	+15	-43	-3	-48	-12	-48	-26	+5	0	+16		-18	+40
Wales	+27	-79	-63	+50	+14	-6	+46	+27	+50	-14	-20	-6	-64	-35		-62	-85
By Size of Firm																	
<115	-14	+6	+6	+2	+9	-23	-14	+7	-3	-3	+6	-8	-13	+2		-28	-27
115-299	+5	+22	+38	+27	+29	-10	+40	+27	+13	-8	-18	0	-8	+25		-16	+28
300-599	+8	0	+40	+43	+67	+29	0	-25	0	-50	0	-13	-33	+14		-40	-13
600+	+9	+34	-43	-75	-33	-33	+100	+100	+100	+50	-67	+100	0	0		-100	-25
By Type of Work																	
Motorways & trunk roads	-23	+7	-14	-5	0	+2	-3	-2	-10	-16	+4	+4	-14	0		+9	-9
Local roads	-41	-25	-31	-11	-19	-29	-33	-23	-26	-22	-19	+8	-18	-22		-14	-26
Railways	-15	-7	-17	-37	-17	-30	+31	-19	+20	+16	-10	+5	-29	+14		-12	+9
Airports	-16	-2	-14	-6	+12	-14	0	-4	-13	-23	-59	+33	0	-15		-85	-65
Harbours, waterways etc.	-28	-24	-15	+5	+4	-9	-8	+5	-4	+9	-32	-26	-48	-25		-37	-27
Water & sewerage	-11	+4	-10	-25	-10	+1	-14	+1	-5	-30	-22	+23	-44	-5		-12	-14
Electricity	+3	-2	+4	-27	+31	-14	+15	0	+7	-25	-45	-21	-3	0		-19	-19
Gas	+23	+19	+36	+18	+53	-13	-6	+57	-67	-32	-7	-53	-20	-32		-36	-56
Communications	+4	+9	-71	+33	+33	+4	-5	+8	-11	+19	+7	-30	+50	+24		-28	-7
Preliminary works, etc.	+14	+17	+23	+26	+4	+4	+1	+8	-9	-34	-18	-15	-24	-24		-47	-38

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3
In the Next 12 Months																	
New Work																	
By Country																	
GB	+22	+32	+6	-2	+20	+14	+19	+31	+21	+4	+6	+18	-8	+23		+11	+2
England	+48	+57	+40	+3	+20	+36	+13	+49	+21	+10	+21	+21	+3	+33		+25	+30
Scotland	-12	-12	-52	-42	+6	-23	0	-26	-18	-6	-18	-46	-25	+30		-39	-36
Wales	+14	-11	-68	+42	0	+25	+18	+70	+45	0	-10	+37	-15	-32		+60	-29
By Size of Firm																	
<115	-4	+21	+2	+5	+7	+2	+2	+10	+7	-13	+14	-15	-5	+16		-16	-19
115-299	+18	+34	+48	+16	+42	+12	+14	+44	+35	+6	+5	0	0	+39		0	+18
300-599	+31	0	0	+22	+33	+44	+71	+33	+38	+25	0	+14	+10	+14		+18	-9
600+	+33	+51	-6	-75	0	0	0	+50	0	0	0	+100	-50	0		+100	+25
R&M																	
By Country																	
GB	+9	+18	-13	-8	+15	+12	+5	+1	+10	-2	0	+4	-5	+15		+14	+7
England	+41	+40	+8	-10	+18	+30	+1	+20	+17	+2	+15	+9	-2	+26		+13	+21
Scotland	-14	-14	-43	-18	+7	0	-3	-31	-15	-2	-3	-12	+3	+19		+5	+11
Wales	-5	-17	-68	+8	0	-10	+6	+5	+5	-4	-53	+32	-35	-35		+79	-47
By Size of Firm																	
<115	0	0	+5	-2	-2	-8	+4	-8	+14	+2	+20	-27	+8	+17		-12	-8
115-299	+4	+15	+19	+5	+24	+13	-4	+19	+31	-7	-10	-8	-6	+22		0	+9
300-599	+8	0	0	+22	+33	+25	+29	-11	-13	0	-13	+29	0	+40		+18	-9
600+	+18	+37	-35	-75	+25	+50	0	0	0	0	0	+33	-33	-50		+100	+50

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

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

Weighted % Balance of Respondents

6 Expected Employment

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

Weighted % Balance of Respondents

7 Costs*

	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	0	0	0	+1	+1	0	0	0	0	0	+1	0		0	+1
Unchanged	+12	+1	+1	+1	0	+2	+1	+6	0	+2	+1	0	0	+3		+4	+5
Slower	+18	+9	+15	+15	+18	+11	+12	+12	+11	+10	+7	+13	+18	+11		+24	+23
Same rate	+59	+74	+70	+71	+69	+81	+79	+72	+86	+85	+86	+81	+79	+82		+63	+63
Faster	+11	+16	+14	+14	+13	+5	+7	+9	+3	+3	+5	+6	+2	+5		+9	+8
Cost Balances																	
By Country																	
GB	+58	+88	+84	+84	+82	+82	+84	+75	+89	+86	+91	+87	+80	+84		+68	+65
England	+60	+90	+90	+75	+71	+88	+83	+82	+85	+79	+87	+76	+65	+82		+59	+54
Scotland	+79	+93	+94	+91	+97	+71	+73	+72	+91	+96	+93	+92	+91	+91		+87	+72
Wales	+18	+67	+57	+100	+100	+85	+100	+95	+90	+92	+95	+100	+90	+79		+93	+75
By Size of Firm																	
<115	+63	+80	+81	+84	+83	+74	+83	+81	+74	+78	+84	+74	+74	+79		+69	+58
115-299	+69	+79	+74	+78	+79	+82	+82	+82	+94	+79	+95	+93	+80	+82		+52	+57
300-599	+69	+90	+89	+100	+100	+100	+100	+80	+100	+100	+90	+88	+90	+88		+73	+73
600+	+41	+100	+87	+75	+75	+75	+75	+33	+100	+100	+100	+100	+75	+100		+100	+75

* 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

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

Weighted % Balance of Respondents

9 Supply of Resources Required

	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3
Skilled Operatives																	
GB	34	32	30	38	41	36	41	42	50	39	32	44	40	52		23	32
England	39	25	39	36	31	37	39	40	63	40	32	42	45	52		28	28
Scotland	32	55	40	24	38	42	51	49	46	44	45	46	53	63		22	47
Wales	45	0	7	67	69	0	29	0	15	38	9	0	10	36		13	35
Other Operatives																	
GB	12	19	7	21	25	15	20	30	18	26	16	11	16	15		13	10
England	12	14	12	15	16	11	15	26	15	19	8	16	22	18		17	12
Scotland	15	37	3	16	31	23	32	33	33	35	33	19	13	19		18	6
Wales	5	0	0	33	25	0	24	0	5	33	5	0	5	11		0	5
Staff																	
GB	32	37	24	33	19	24	29	38	30	31	33	26	28	30		13	19
England	30	35	31	30	18	32	32	33	33	12	31	22	36	19		18	22
Scotland	38	36	21	22	25	19	27	44	25	54	48	23	25	38		13	13
Wales	0	22	0	33	0	0	0	0	0	50	9	0	5	32		0	5
Plant																	
GB	6	6	1	6	3	4	1	4	4	2	2	4	4	3		1	4
England	4	3	1	5	5	8	1	7	0	3	2	2	9	0		2	3
Scotland	5	8	2	0	0	0	0	3	14	0	3	0	0	3		0	6
Wales	23	22	0	0	0	0	6	0	0	4	0	0	0	0		0	5
Materials and Products																	
GB	5	6	3	1	8	1	5	8	6	1	7	1	10	1		14	15
England	9	5	5	2	10	3	4	10	4	0	13	0	8	2		5	6
Scotland	2	8	3	0	9	0	3	13	11	0	3	4	0	0		13	19
Wales	0	0	0	0	0	0	0	0	0	4	5	0	0	0		13	5

% 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 Q3 survey totalled 85. 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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