



Workload Trends 2020 Q4

Civils workloads and orders bounced back in Q4

Weighted Balances (%)

Change on 12 Months Ago

Workload	
2019 Q4	+3
2020 Q4	+11

Tender Prices

New Work	
2019 Q4	+29
2020 Q4	+39
R&M Work	
2019 Q4	+23
2020 Q4	+32

Order Books

2019 Q4	+13
2020 Q4	+20

Over the Next 12 Months

Expected Workload	
2019 Q4	+27
2020 Q4	+44

Expected Orders

New Work	
2019 Q4	+23
2020 Q4	+47
R&M Work	
2019 Q4	+15
2020 Q4	+9

- After two successive quarters of annual falls, workloads rose in Q4, according to a balance of 11% British firms.
- Order books increased for 20% of British firms in Q4, the highest balance in three years.
- 44% and 47% of firms expected workloads and orders, respectively, to increase over the next 12 months, the highest balances since 2015.
- Nearly half of all firms expect headcount to rise in the coming year, the highest balance in nearly six years.
- 39% of firms reported higher tender prices, on balance, for new construction work, and 32% of firms for R&M.

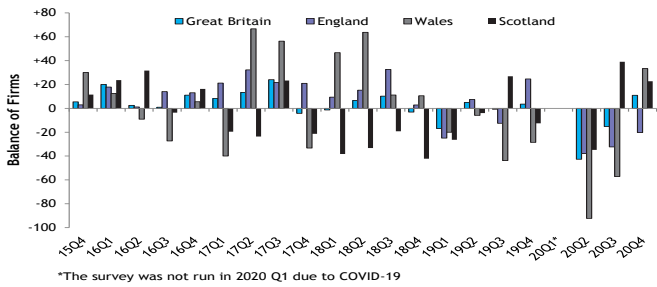
Change in Workloads and Order Books - Great Britain



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

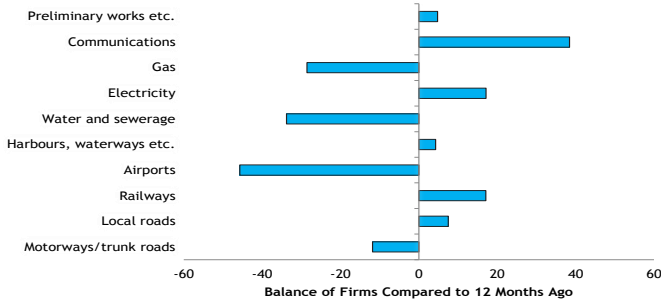
Trends in Workload

Workloads Compared to 12 Months Ago



Workloads rebounded in Great Britain during the final quarter of 2020, despite renewed lockdowns and tiered restrictions in different parts of the country. On balance, 11% of firms, reported an increase in workloads on a year ago, following two consecutive quarters of annual decline. Overall, 41% of the respondents reported that workloads had increased, and 30% of the respondents reported that they had fallen. In Scotland, 23% of firms, on balance, reported an increase in workloads in Q4, compared to 39% in Q3. In Wales, workloads increased for the first time since 2018 Q4, according to one-third of firms, on balance. However, in England, annual workloads declined for a third consecutive quarter in Q4, according to 20% of firms, on balance. Overall, 42% of firms reported that workloads had fallen.

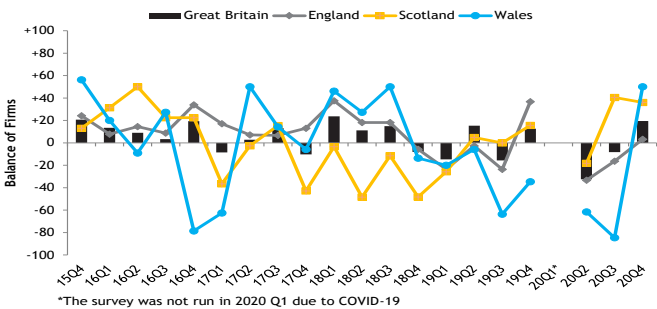
Workload – By Type of Work (GB)



Six of the 10 sectors in Great Britain reported that workloads increased compared to a year earlier, on balance, in Q4. The sector that reported the strongest balance in workloads in Q4 was communications, with 38% of firms reporting an annual increase, followed by railways and electricity (both 17%). For railways, this was the highest balance in six years. Local roads (7%), preliminary works (5%) and harbours and waterways (4%) also reported annual increases in workloads, on balance, in Q4 following two consecutive quarters of decline. Meanwhile, airports (-46%), water and sewerage (-34%) and gas (-29%) all reported negative annual balances for the third successive quarter in Q4. In motorways/trunk roads, 12% of firms, on balance, reported an annual fall in workloads in Q4, the lowest balance in nearly three years.

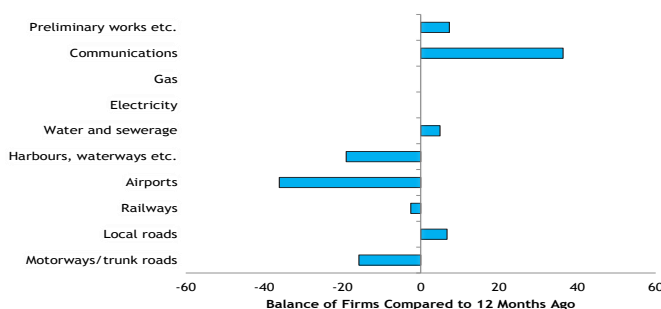
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



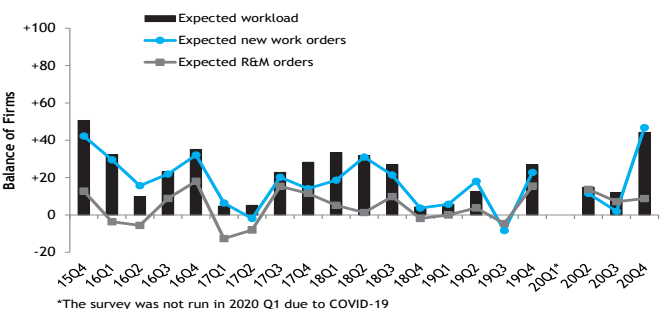
After two consecutive quarters of decline, order books across Great Britain improved in 2020 Q4. On balance, 20% of firms reported an increase in orders compared to a year ago, marking the highest balance in three years. 44% of firms reported that orders had increased and 32% of firms reported that they were unchanged. In England, 3% of firms, on balance, reported an increase in orders in Q4, up from -16% in Q3. Overall, 45% of firms reported that orders were unchanged and 29% reported that they had risen. Similarly, 36% of firms in Scotland and half of firms in Wales, on balance, reported that order books had increased compared to a year earlier. For Wales, this was the highest balance since 2018 Q3.

Order Books – By Type of Work (GB)



Four sectors reported an annual increase in orders during the final quarter of 2020, on balance. Communications (36%), local roads (7%) and water and sewerage (5%) all reported annual increases in orders, on balance, in Q4, following two successive quarters of decline. A positive balance of 7% was also recorded for preliminary works, the highest since 2018 Q2. Meanwhile, four sectors experienced an annual fall in orders in Q4, with airports (-36%) and harbours and waterways (-19%) both posting negative balances for the third successive quarter. A balance of 16% and 3% of firms also reported an annual decrease in orders in motorways/trunk roads and railways respectively, in Q4. The balance for motorways/trunk roads was the lowest since 2018 Q4. For both electricity and gas, a zero balance was recorded in Q4.

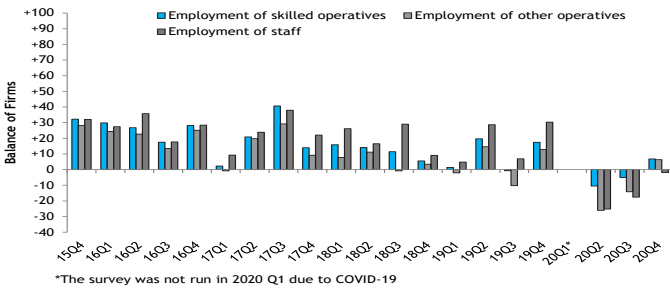
Expected Future Trends in the Next 12 Months



In Q4, 44% of firms, on balance, in Great Britain reported that workloads are expected to increase in the next 12 months, the highest since 2015 Q4. In England, 53% of firms reported that workloads are expected to increase over the next 12 months, the highest balance since 2016 Q4. In Scotland, this figure was 14% and in Wales, two-thirds of firms, on balance expected workloads to rise. For new work orders, 47% of British firms anticipated an increase in the next 12 months, the highest balance in nearly six years. By nation; England (51%), Scotland (26%) and Wales (67%). For R&M orders, 9% of British firms, on balance, expected an increase during the next 12 months. This figure is 18% for English and 21% for Scottish firms, whilst a zero balance was reported by Welsh firms.

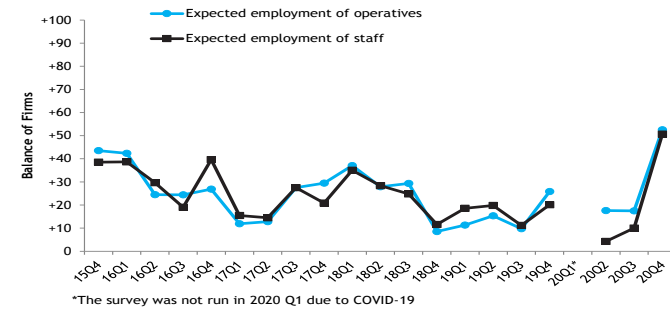
Trends in Employment

Employment Compared to 12 months Ago (GB)



Employment data showed a mixed picture in Q4, with Scotland the only nation to see positive balances for all types of worker. In Britain, on balance, 7% and 6% of firms reported an increase in employment of skilled operatives and other operatives respectively, up from -5% and -14% in Q3. For staff, however, a negative balance (-2%) was recorded for the third consecutive quarter. In England, employment of staff, skilled operatives and other operatives fell according to 28%, 18% and 16% of firms respectively. In Wales, zero balances were recorded for all types of worker in Q4. Meanwhile, Scotland was the only nation to record positive balances for all types of worker in Q4; 45% for other operatives, 41% for skilled operatives and 33% for staff. These balances were also the highest in five years.

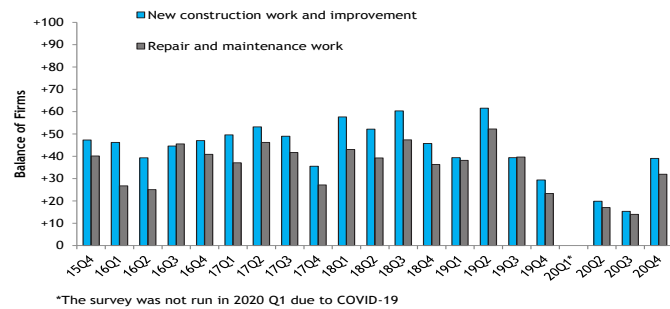
Expected Employment in the Next 12 Months



In Great Britain, recruitment intentions for the next 12 months remained positive in Q4, with 53% and 51% of firms expecting a rise in operatives and staff employment, respectively. Both balances were the highest in nearly six years. In England, 51% and half of firms, on balance, anticipated a rise in staff and operatives employment, respectively. In Scotland, a balance of 55% of firms (near seven-year high) expected the employment of operatives to increase, and 36% of firms (five-year high) expected the employment of staff to increase. In Wales, on balance, two-thirds of respondents expected the employment of both operatives and staff to increase in the next 12 months.

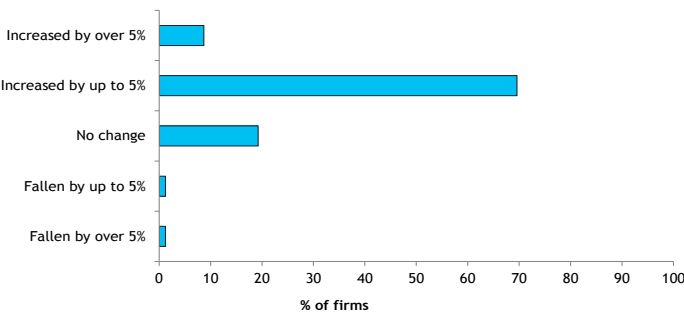
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



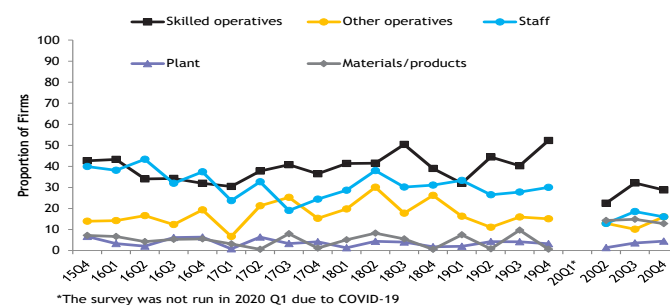
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 39% of firms for new construction work and improvement, and 32% for repair and maintenance work. Both balances were the highest in nearly two years. In England, tender prices were higher, on balance, for 24% and 15% of firms for new construction work and improvement, and for repair and maintenance work, respectively. In Scotland, 45% of respondents reported an increase in tender prices for new construction work and improvement, the highest balance since 2017 Q2, and 55% for repair and maintenance, the highest balance since 2016 Q3. In Wales, on balance, 67% of respondents reported an increase in tender prices for new construction work and improvement, whilst a zero balance was recorded for repair and maintenance.

Costs Compared with 12 Months Ago (GB)



In Q4, a balance of 76% of firms in Great Britain reported an increase in costs, up from a near four-year low balance of 65% in Q3. Overall, 70% of firms reported that costs increased by up to 5% compared to 12 months earlier and 9% reported increases of over 5%. In England, three-quarters of firms, on balance, reported an increase in costs, up from 54% in Q3, which was the lowest balance in nearly nine years. 5% of firms reported rises of over 5%, 74% by up to 5%, whilst 4% of firms reported decreases. In Scotland, costs increased, on balance, according to 83% of firms, with 17% of firms reporting increases of over 5% and 67% by up to 5%. In Wales, 86% of firms, on balance, reported an increase in costs over the last 12 months, up from 75% in Q3. 71% of firms reported increases of up to 5%, 14% by over 5%, whilst no 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, 29% of respondents reported dissatisfaction with the supply of skilled operatives, whilst 16% reported dissatisfaction with the supply of both other operatives and staff. The percentage citing dissatisfaction in supply of materials/products was 13% in Q4, down from 15% in Q3 but the third-highest proportion in six years. For supply of plant, 4% of firms cited dissatisfaction. The most commonly reported dissatisfaction with supply in Q4 was for skilled operatives in England (18%), Scotland (55%) and Wales (67%). 14% of firms in England and 33% of firms in Scotland were also dissatisfied with the supply of other operatives, whilst 67% of firms in Wales cited staff as another concern, the highest proportion since 2007 Q1.

Workload Trends Survey

1 Workload	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
GB	+11	+8	+13	+24	-4	-1	+6	+10	-3	-17	+5	-1	+3		-43	-15	+11
England	+13	+21	+32	+22	+21	+9	+15	+33	+3	-25	+7	-13	+25		-38	-32	-20
Scotland	+16	-20	-24	+23	-21	-38	-33	-19	-42	-26	-4	+27	-13		-35	+39	+23
Wales	+6	-40	+67	+56	-33	+47	+64	+11	+11	-20	-6	-44	-29		-92	-57	+33
By Size of Firm																	
<115	+3	+19	0	+17	-20	-26	-2	+8	+3	+8	0	+3	-6		-42	-27	-14
115-299	+16	+45	+32	+29	+4	-8	+22	+19	-3	-11	-8	-5	+16		-40	+22	+24
300-599	+25	+25	+13	+75	+57	0	0	-13	-13	-20	0	0	0		-36	-13	+38
600+	+5	-18	0	0	-100	+67	0	+50	0	-67	+50	0	0		-100	-50	0
By Type of Work																	
Motorways & trunk roads	-4	-14	-15	+5	-10	+8	-10	-13	+6	+2	-1	+3	-6		+3	-6	-12
Local roads	-13	-22	-16	-19	-24	-15	-21	-21	-15	-27	-1	-2	-18		-16	-22	+7
Railways	-30	-1	-8	-38	-32	+4	-13	-13	-28	-20	+11	-8	+9		+8	+16	+17
Airports	-18	+5	+17	+8	0	+22	+19	-9	-7	-37	+30	-24	-13		-81	-86	-46
Harbours, waterways etc.	-23	-12	-5	-1	-28	-15	+9	+4	+8	-21	-19	-37	-35		-45	-21	+4
Water & sewerage	+1	-16	-10	-6	+1	-14	+10	-1	-13	-19	+36	-44	-11		-27	-28	-34
Electricity	+8	-16	-16	+24	-8	+11	+12	+12	-33	-46	+14	-3	-10		-22	-4	+17
Gas	+14	+29	+57	+57	+6	0	+42	-58	-11	+6	-53	-31	-28		-36	-60	-29
Communications	+13	-54	-21	+33	+28	0	+21	-13	+15	+54	-22	+57	0		-33	-7	+38
Preliminary works, etc.	+26	+37	+11	+12	+10	+3	+2	+3	-9	-8	-25	-22	-20		-50	-39	+5
Weighted % Balance of Respondents																	
2 Expected Workload																	
In the Next 12 Months																	
By Country																	
GB	+35	+5	+5	+23	+28	+33	+32	+27	+4	+6	+13	0	+27		+15	+12	+44
England	+60	+31	+16	+20	+50	+34	+48	+25	+7	+17	+18	+8	+39		+24	+28	+53
Scotland	-2	-51	-49	+6	-4	+3	-20	-11	-4	-21	-38	-6	+27		-26	-17	+14
Wales	-11	-68	+42	+25	+35	+71	+70	+60	+13	+5	+37	-15	-32		+67	+5	+67
By Size of Firm																	
<115	+16	+9	+10	+11	+6	+8	+8	+17	-2	+19	-12	+5	+20		-8	-12	+14
115-299	+48	+48	+20	+38	+23	+25	+48	+53	0	0	0	+11	+46		+13	+26	+53
300-599	0	+11	+22	+67	+67	+71	+33	+25	+25	0	+14	+20	+14		+9	+27	+50
600+	+51	-14	-50	0	+33	+67	+50	0	0	0	+67	-50	0		+100	0	+57
Weighted % Balance of Respondents																	
3 Order Books																	
Compared with 12 Months Ago																	
By Country																	
GB	+19	-9	+3	+13	-10	+24	+11	+15	-8	-15	+15	-16	+13		-32	-8	+20
England	+34	+17	+7	+7	+13	+38	+18	+18	-6	-24	-3	-24	+37		-33	-16	+3
Scotland	+23	-37	-3	+15	-43	-3	-48	-12	-48	-26	+5	0	+16		-18	+40	+36
Wales	-79	-63	+50	+14	-6	+46	+27	+50	-14	-20	-6	-64	-35		-62	-85	+50
By Size of Firm																	
<115	+6	+6	+2	+9	-23	-14	+7	-3	-3	+6	-8	-13	+2		-28	-27	-10
115-299	+22	+38	+27	+29	-10	+40	+27	+13	-8	-18	0	-8	+25		-16	+28	+31
300-599	0	+40	+43	+67	+29	0	-25	0	-50	0	-13	-33	+14		-40	-13	+17
600+	+34	-43	-75	-33	-33	+100	+100	+100	+50	-67	+100	0	0		-100	-25	+33
By Type of Work																	
Motorways & trunk roads	+7	-14	-5	0	+2	-3	-2	-10	-16	+4	+4	-14	0		+9	-9	-16
Local roads	-25	-31	-11	-19	-29	-33	-23	-26	-22	-19	+8	-18	-22		-14	-26	+7
Railways	-7	-17	-37	-17	-30	+31	-19	+20	+16	-10	+5	-29	+14		-12	+9	-3
Airports	-2	-14	-6	+12	-14	0	-4	-13	-23	-59	+33	0	-15		-85	-65	-36
Harbours, waterways etc.	-24	-15	+5	+4	-9	-8	+5	-4	+9	-32	-26	-48	-25		-37	-27	-19
Water & sewerage	+4	-10	-25	-10	+1	-14	+1	-5	-30	-22	+23	-44	-5		-12	-14	+5
Electricity	-2	+4	-27	+31	-14	+15	0	+7	-25	-45	-21	-3	0		-19	-19	0
Gas	+19	+36	+18	+53	-13	-6	+57	-67	-32	-7	-53	-20	-32		-36	-56	0
Communications	+9	-71	+33	+33	+4	-5	+8	-11	+19	+7	-30	+50	+24		-28	-7	+36
Preliminary works, etc.	+17	+23	+26	+4	+4	+1	+8	-9	-34	-18	-15	-24	-24		-47	-38	+7
Weighted % Balance of Respondents																	
4 Expected Trends in New Orders																	
In the Next 12 Months																	
New Work																	
By Country																	
GB	+32	+6	-2	+20	+14	+19	+31	+21	+4	+6	+18	-8	+23		+11	+2	+47
England	+57	+40	+3	+20	+36	+13	+49	+21	+10	+21	+21	+3	+33		+25	+30	+51
Scotland	-12	-52	-42	+6	-23	0	-26	-18	-6	-18	-46	-25	+30		-39	-36	+26
Wales	-11	-68	+42	0	+25	+18	+70	+45	0	-10	+37	-15	-32		+60	-29	+67
By Size of Firm																	
<115	+21	+2	+5	+7	+2	+2	+10	+7	-13	+14	-15	-5	+16		-16	-19	+5
115-299	+34	+48	+16	+42	+12	+14	+44	+35	+6	+5	0	0	+39		0	+18	+42
300-599	0	0	+22	+33	+44	+71	+33	+38	+25	0	+14	+10	+14		+18	-9	+63
600+	+51	-6	-75	0	0	0	+50	0	0	0	+100	-50	0		+100	+25	+71
R&M																	
By Country																	
GB	+18	-13	-8	+15	+12	+5	+1	+10	-2	0	+4	-5	+15		+14	+7	+9
England	+40	+8	-10	+18	+30	+1	+20	+17	+2	+15	+9	-2	+26		+13	+21	+18
Scotland	-14	-43	-18	+7	0	-3	-31	-15	-2	-3	-12	+3	+19		+5	+11	+21
Wales	-17	-68	+8	0	-10	+6	+5	+5	-4	-53	+32	-35	-35		+79	-47	0
By Size of Firm																	
<115	0	+5	-2	-2	-8	+4	-8	+14	+2	+20	-27	+8	+17		-12	-8	-6
115-299	+15	+19	+5	+24	+13	-4	+19	+31	-7	-10	-8	-6	+22		0	+9	0
300-599	0	0	+22	+33	+25	+29	-11	-13	0	-13	+29	0	+40		+18	-9	+25
600+	+37	-35	-75	+25	+50	0	0	0	0	0	+33	-33	-50		+100	+50	+14
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.

Workload Trends Survey

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

Weighted % Balance of Respondents

6 Expected Employment	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4
In the Next 12 Months																	
<i>By Country</i>																	
Operative jobs																	
GB	+27	+12	+13	+28	+29	+37	+28	+29	+9	+11	+15	+10	+26		+18	+18	+53
England	+48	+26	+15	+28	+45	+36	+45	+15	+6	+24	+5	+13	+38		+31	+28	+50
Scotland	-2	-29	-33	+3	+8	+11	-6	+4	+8	-10	-12	+3	+21		-39	+6	+55
Wales	-11	-25	+42	+25	+35	+76	+70	+55	+25	+10	+37	-15	-27		+67	+26	+67
Employment of staff																	
GB	+40	+15	+14	+28	+21	+35	+28	+25	+12	+19	+20	+11	+20		+4	+10	+51
England	+62	+28	+19	+27	+44	+37	+42	+15	+1	+26	+13	+14	+28		+13	+14	+51
Scotland	+2	-27	-22	+13	-13	+11	-9	+7	+17	0	-8	+3	+24		-43	+6	+36
Wales	+33	-11	+42	+25	+30	+65	+70	+25	+25	0	+37	-15	-18		+71	+16	+67
<i>By Size of Firm</i>																	
Operative jobs																	
<115	+10	+14	+17	+11	+6	+14	+14	+24	+11	+24	-9	+8	+20		-3	-2	+8
115-299	+34	+43	+16	+38	+27	+21	+52	+41	+3	+5	+7	+16	+44		+17	+30	+63
300-599	+11	0	+33	+67	+67	+71	+22	+38	0	+11	+14	+30	+14		+9	+18	+63
600+	+37	+3	-25	+25	+33	+75	0	0	+33	0	+67	-25	0		+100	+25	+71
Employment of staff																	
<115	+13	+16	+3	+7	+2	+16	+12	+24	+9	+15	-6	+8	+24		-22	-10	+3
115-299	+28	+52	+33	+42	+27	+21	+48	+35	0	+29	+21	+21	+32		+9	+26	+42
300-599	+33	+11	+33	+67	+33	+71	+33	+25	+25	+22	+14	+30	0		-9	+18	+63
600+	+65	+3	-25	+25	+33	+67	0	0	+33	0	+67	-25	0		+100	0	+86

Weighted % Balance of Respondents

7 Costs*	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	0	0	+1	+1	0	0	0	0	0	+1	0		0	+1	+1
Unchanged	+1	+1	+1	0	+2	+1	+6	0	+2	+1	0	0	+3		+4	+5	+1
Slower	+9	+15	+15	+18	+11	+12	+12	+11	+10	+7	+13	+18	+11		+24	+23	+19
Same rate	+74	+70	+71	+69	+81	+79	+72	+86	+85	+86	+81	+79	+82		+63	+63	+70
Faster	+16	+14	+14	+13	+5	+7	+9	+3	+3	+5	+6	+2	+5		+9	+8	+9
Cost Balances																	
<i>By Country</i>																	
GB	+88	+84	+84	+82	+82	+84	+75	+89	+86	+91	+87	+80	+84		+68	+65	+76
England	+90	+90	+75	+71	+88	+83	+82	+85	+79	+87	+76	+65	+82		+59	+54	+75
Scotland	+93	+94	+91	+97	+71	+73	+72	+91	+96	+93	+92	+91	+91		+87	+72	+83
Wales	+67	+57	+100	+100	+85	+100	+95	+90	+92	+95	+100	+90	+79		+93	+75	+86
<i>By Size of Firm</i>																	
<115	+80	+81	+84	+83	+74	+83	+81	+74	+78	+84	+74	+74	+79		+69	+58	+61
115-299	+79	+74	+78	+79	+82	+82	+82	+94	+79	+95	+93	+80	+82		+52	+57	+86
300-599	+90	+89	+100	+100	+100	+100	+80	+100	+100	+90	+88	+90	+88		+73	+73	+88
600+	+100	+87	+75	+75	+75	+75	+33	+100	+100	+100	+100	+75	+100		+100	+75	+71

* 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.

Workload Trends Survey

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

Weighted % Balance of Respondents

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

% 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 Q4 survey totalled 77. 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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