Workload Trends 2022 Q4

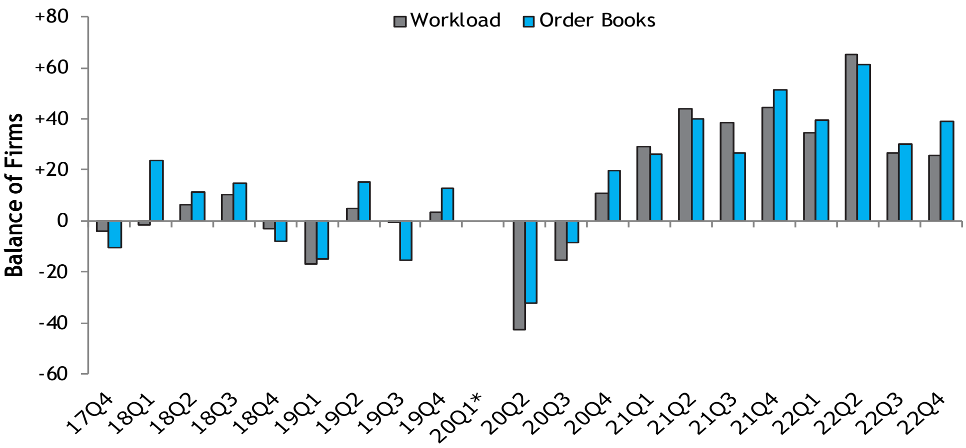
Workloads and order books increased in Q4

Weighted Balances (%)

Change on 12 Months Ago	
Workload	
2021 Q4	+45
2022 Q4	+26
Tender Prices	
New Work	
2021 Q4	+89
2022 Q4	+87
R&M Work	
2021 Q4	+81
2022 Q4	+85
Order Books	
2021 Q4	+51
2022 Q4	+39
Over the Next 12 Months	
Expected Workload	
2021 Q4	+51
2022 Q4	+29
Expected Orders	
New Work	
2021 Q4	+45
2022 Q4	+16
R&M Work	
2021 Q4	+27
2022 Q4	-7

- On balance, 26% of British firms reported an increase in workloads in Q4, marking a ninth quarter of growth.
- Workloads increased in 8 out of 12 sectors, including railways and airports
- Order books rose for 39% of firms, on balance, and 29% expected higher workloads in the year ahead.
- Cost pressures remained elevated, with 91% of firms reporting increases of over 5%.
- The proportions of British firms reporting difficulties with the supply of skilled and other operatives eased from Q3 but remained elevated.

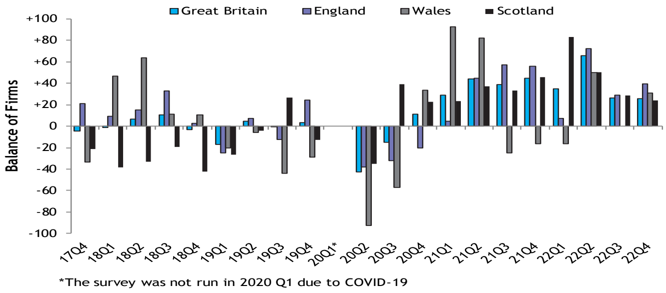
Change in Workloads and Order Books - Great Britain



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

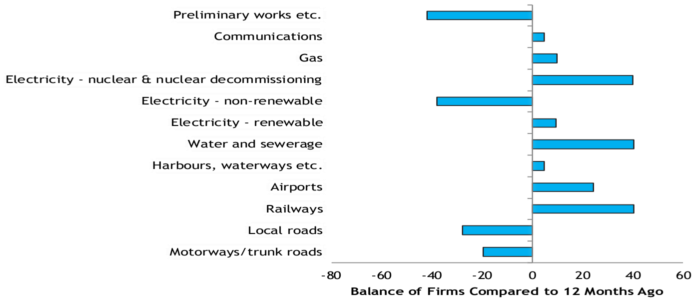
Trends in Workload

Workloads Compared to 12 Months Ago



Civil engineering contractors across Great Britain experienced annual workloads growth for a ninth consecutive quarter in Q4. On balance, 26% of firms reported an annual rise in workloads, largely unchanged from a balance of 27% in Q3. Overall, 48% of the respondents reported that workloads had increased and 22% reported that they had fallen. The picture was similar at a national level. In England, 40% of firms reported an annual rise in workloads, up from a balance of 29% in Q3. In Scotland, 24% of firms in reported that workloads rose compared to a year ago, down from 29% in Q3, whilst in Wales, 31% of firms reported an increase in workloads from a year ago, up from a zero balance in Q3.

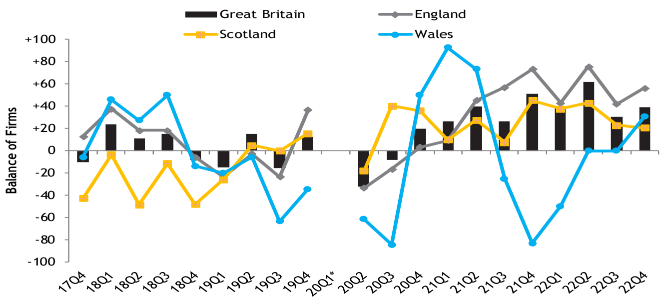
Workload — By Type of Work (GB)



Growth in workloads was experienced in eight of the 12 sectors in Q4. This includes railways (41%), water and sewerage (41%) and nuclear & nuclear decommissioning (40%). Airports, renewable electricity, gas, communications and harbours & waterways also recorded positive balances in Q4. In the remaining sectors, the largest negative balance was recorded for preliminary works, in which 42% of respondents reported a fall in workloads and the first fall since 2020 Q3. Workloads also fell in non-renewable electricity (according to a balance of 38%), local roads (28%), and motorways/trunk roads (20%). For local roads this was also the first fall in workloads reported since 2020 Q3.

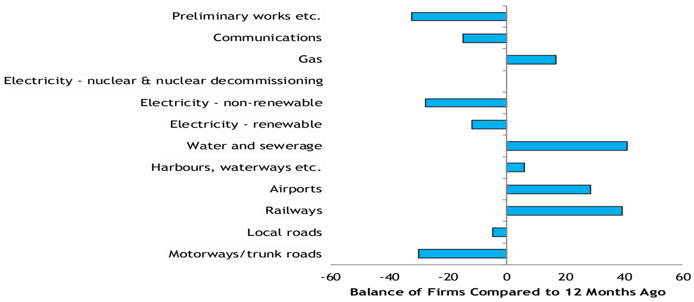
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



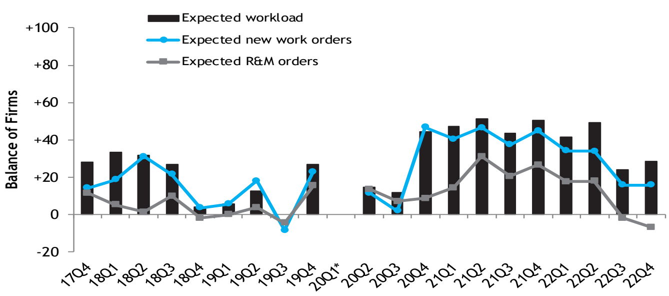
Order books for civil engineering firms continued to grow in annual terms across Great Britain in Q4, matching the run of nine quarters of growth in workloads. On balance 39% of British firms reported an increase, compared to 30% in Q3. Overall, 52% of firms reported that orders had risen and 13% reported that they had fallen. In England, 56% of firms reported an annual increase in orders in Q4, up from 42% in Q3. In Scotland, 44% of firms reported that orders had increased in Q4 compared to a year earlier, and 23% reported that they had fallen, leaving a positive balance of 21%. In Wales, 31% of respondents reported an annual increase in new orders, on balance, following two consecutive quarters of zero balances (equal proportions reporting either an increase or decrease).

Order Books — By Type of Work (GB)



Only five out of 12 sectors experienced an annual increase in order books, on balance, in Q4. A balance of 41% of firms cited an annual increase in orders for water & sewerage, whilst 39% and 29% reported that order books rose in railways and airports, respectively. For airports, this was the highest balance since pre-pandemic in 2019 Q2. Order books in gas and harbours and waterways also rose in annual terms in Q4. However, a fall in order books was reported, on balance, in six sectors: preliminary works (32% on balance), motorways/trunk roads (30%), non-renewable electricity (28%), communications (15%), renewable electricity (12%) and local roads (5%). A zero balance was recorded for nuclear electricity with equal proportions of respondents reporting either an increase or decrease in order books.

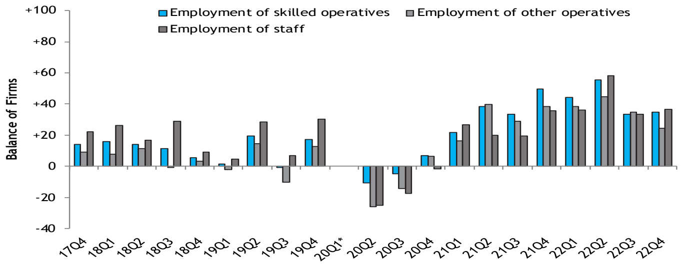
Expected Future Trends in the Next 12 Months



On balance, 29% of British firms reported that workloads are expected to increase in the next 12 months, up from 24% in Q3. In England, 40% of firms expected workloads to increase over the next 12 months. This figure was 46% in Wales, whilst in Scotland, 4% expected a decline in workloads, on balance. For new work orders, 16% of British firms anticipated an increase over the coming year, on balance. By nation; England (25%), Wales (15%) expected new work orders to increase, whereas a balance of 13% of firms in Scotland expected new work orders to decline over the next 12 months. For R&M orders, 7% of British firms expected a decline over the next 12 months. In England, Wales and Scotland falls were expected by 8%, 60% and 22%, respectively, on balance.

Trends in Employment

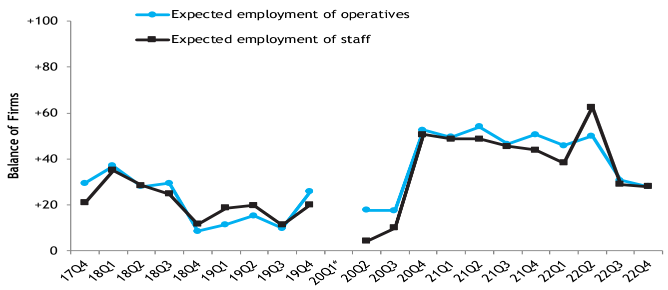
Employment Compared to 12 months Ago (GB)



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

Firms in Great Britain continued to expand their workforce in Q4. 35% and 24% of firms reported an increase in employment of skilled operatives and other operatives respectively, compared to balances of 33% and 35% in Q3. For staff, a balance of 36% of firms reported an increase in employment in Q4, similar to 33% in Q3. In England, employment balances were 46% for skilled operatives, 44% for other operatives and 47% for staff. In Scotland, a balance of 19% was reported for skilled operatives, 2% for other operatives and 15% for staff. In Wales, employment increased, on balance, according to 15% of firms for skilled operatives 33% for staff, but a balance of 15% of firms reported a decrease in the employment of other operatives in Q4.

Expected Employment in the Next 12 Months



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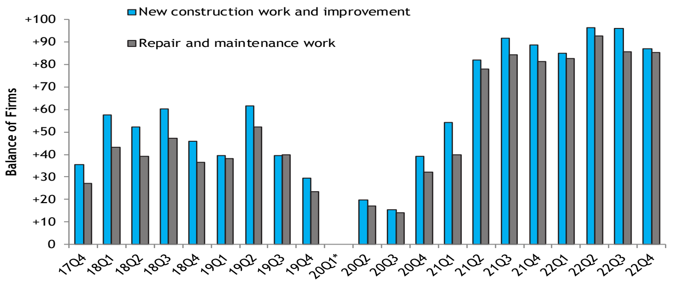
The 12-month employment outlook for Great Britain remained positive in the fourth quarter of 2022, with a balance of 28% of firms expecting an increase in both operatives and staff employment. In England, 37% and 44% of firms expected the employment of operatives and staff to increase, respectively. In Wales, on balance, 38% of firms expected employment to increase for operatives and 54% for staff. In Scotland, however, 2% of firms, on balance, expected the employment of operatives to decrease over the next 12 months and a balance of 9% expected the employment of staff to decrease. These were the first negative balances since 2020 Q2.

Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



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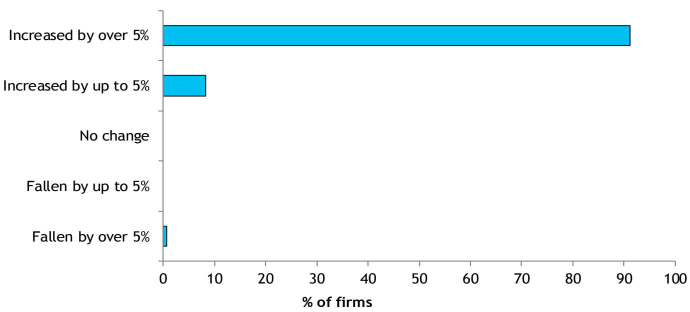
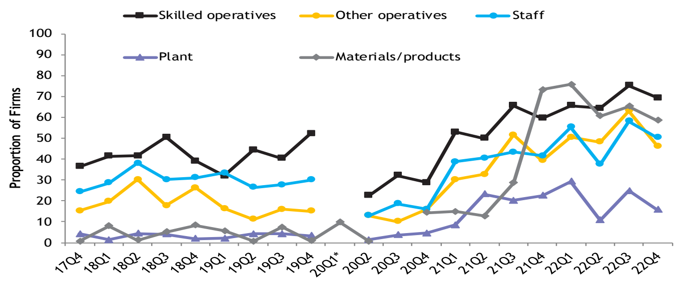
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 87% of firms for new construction work and improvement, and 85% for repair and maintenance work. Both balances moderated from Q3 but remained historically high. In England, tender prices were higher, on balance, for 89% and 87% of firms for new construction work and improvement, and for repair and maintenance work, respectively. In Scotland, 85% firms reported higher tender prices for new construction work and improvement, and 89% for repair and maintenance work. In Wales 62% of firms reported an annual increase in tender prices for new construction work and improvement, and 89% for repair and maintenance.

Costs Compared with 12 Months Ago (GB)



An annual increase in costs was reported by 99% of firms in Great Britain, on balance, in Q4. The balance has been above 97% for seven consecutive quarters. 91% of respondents reported that costs increased by over 5% compared to a year earlier. This was replicated across England, Scotland and Wales, with an increase in costs reported by balances of 96% in England, and all firms in Scotland and Wales. In each nation, the majority of respondents reported cost increases of more than 5%.

Contractors Unsatisfied with Supply (GB)



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Overall, civil engineering firms in Great Britain reported that the supply of key resources improved slightly in Q4 compared to Q3. 69% of firms cited issues with the supply of skilled operatives and 50% cited issues with the supply of staff. The proportion of firms citing issues with the supply of other operatives was 46%, whilst 26% and 16% reported issues with materials/products and plant, respectively. At a national level, the supply of skilled operatives was the largest dissatisfaction for firms in England, Scotland and Wales, according to 68%, 68% and 77% of firms, respectively. Supply of other operatives was the joint most commonly-cited issue for firms in Wales, with 69% also citing dissatisfaction with the supply of staff in Q4.

1 Workload

	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
GB	-3	-17	+5	-1	+3		-43	-15	+11	+29	+44	+39	+45	+35	+65	+27	+26
England	+3	-25	+7	-13	+25		-38	-32	-20	+5	+45	+58	+56	+7	+72	+29	+40
Scotland	-42	-26	-4	+27	-13		-35	+39	+23	+24	+38	+33	+45	+83	+50	+29	+24
Wales	+11	-20	-6	-44	-29		-92	-57	+33	+93	+82	-25	-17	-17	+50	0	+31
By Size of Firm																	
<115	+3	+8	0	+3	-6		-42	-27	-14	+27	+32	+16	+8	+18	+27	-5	-19
115-299	-3	-11	-8	-5	+16		-40	+22	+24	+13	+20	+42	+27	+31	+60	+31	+42
300-599	-13	-20	0	0	0		-36	-13	+38	+56	+46	+44	+67	+60	+75	+43	+8
600+	0	-67	+50	0	0		-100	-50	0	0	+100	+50	+100	+33	+100	+33	+75
By Type of Work*																	
Motorways & trunk roads	+6	+2	-1	+3	-6		+3	-6	-12	+27	+12	-2	+2	-6	+9	-10	-20
Local roads	-15	-27	-1	-2	-18		-16	-22	+7	+18	+25	+12	+5	+7	+17	+7	-28
Railways	-28	-20	+11	-8	+9		+8	+16	+17	-22	-2	-27	+5	+41	+47	-10	+41
Airports	-7	-37	+30	-24	-13		-81	-86	-46	-63	-62	-58	-8	-35	0	-15	+24
Harbours, waterways etc.	+8	-21	-19	-37	-35		-45	-21	+4	+3	+28	-4	+34	+30	+14	-6	+5
Water & sewerage	-13	-19	+36	-44	-11		-27	-28	-34	-2	-8	+35	+8	+10	+52	+2	+41
Electricity - renewable											+46	+36	+52	+14	+20	+3	+9
Electricity - non-renewable											-7	+23	+14	+23	0	-24	-38
Electricity - nuclear & nuclear decommissioning											0	-50	-20	+14	na	+38	+40
Gas	-11	+6	-53	-31	-28		-36	-60	-29	-86	-54	-38	0	-50	na	-71	+10
Communications	+15	+54	-22	+57	0		-33	-7	+38	-5	+58	+18	+6	-29	+43	+10	+5
Preliminary works, etc.	-9	-8	-25	-22	-20		-50	-39	+5	+13	+26	+27	+32	+43	+26	+4	-42

Weighted % Balance of Respondents

2 Expected Workload

	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
In the Next 12 Months																	
By Country																	
GB	+4	+6	+13	0	+27		+15	+12	+44	+47	+51	+43	+51	+41	+49	+24	+29
England	+7	+17	+18	+8	+39		+24	+28	+53	+31	+66	+71	+56	+40	+63	+22	+40
Scotland	-4	-21	-38	-6	+27		-26	-17	+14	+47	+6	+7	+41	+20	+7	+3	-4
Wales	+13	+5	+37	-15	-32		+67	+5	+67	+64	+71	+17	+30	+50	+75	+19	+46
By Size of Firm																	
<115	-2	+19	-12	+5	+20		-8	-12	+14	+39	+45	+21	+20	+26	+33	+5	+15
115-299	0	0	0	+11	+46		+13	+26	+53	+44	+38	+62	+64	+69	+80	+13	+50
300-599	+25	0	+14	+20	+14		+9	+27	+50	+56	+46	+40	+43	+33	0	+40	+33
600+	0	0	+67	-50	0		+100	0	+57	+50	+100	+50	+100	+33	+100	+33	0

Weighted % Balance of Respondents

3 Order Books

	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
GB	-8	-15	+15	-16	+13		-32	-8	+20	+26	+40	+27	+51	+40	+62	+30	+39
England	-6	-24	-3	-24	+37		-33	-16	+3	+9	+45	+57	+74	+43	+76	+42	+56
Scotland	-48	-26	+5	0	+16		-18	+40	+36	+10	+28	+8	+45	+38	+43	+23	+21
Wales	-14	-20	-6	-64	-35		-62	-85	+50	+93	+73	-25	-83	-50	0	0	+31
By Size of Firm																	
<115	-3	+6	-8	-13	+2		-28	-27	-10	+17	+26	+11	+8	+29	+14	-11	-12
115-299	-8	-18	0	-8	+25		-16	+28	+31	+7	+6	+31	+80	+54	+50	+27	+40
300-599	-50	0	-13	-33	+14		-40	-13	+17	+63	+46	+22	+40	+40	+75	+57	+55
600+	+50	-67	+100	0	0		-100	-25	+33	0	+100	+50	+100	+33	+100	+33	+67
By Type of Work*																	
Motorways & trunk roads	-16	+4	+4	-14	0		+9	-9	-16	+20	+28	+7	+9	-14	+45	-3	-30
Local roads	-22	-19	+8	-18	-22		-14	-26	+7	+18	+15	-12	-14	+20	+23	+4	-5
Railways	+16	-10	+5	-29	+14		-12	+9	-3	-44	0	-13	+38	+27	+44	-2	+39
Airports	-23	-59	+33	0	-15		-85	-65	-36	-50	-50	-50	-8	-18	0	+5	+29
Harbours, waterways etc.	+9	-32	-26	-48	-25		-37	-27	-19	-4	+28	-14	+32	+50	+29	+5	+6
Water & sewerage	-30	-22	+23	-44	-5		-12	-14	+5	+9	+6	+32	+23	+12	+47	+17	+41
Electricity - renewable											+59	+7	+20	+19	+9	+4	-12
Electricity - non-renewable											+3	+30	-4	-25	-39	-37	-28
Electricity - nuclear & nuclear decommissioning											+43	-33	-17	+14	0	+55	0
Gas	-32	-7	-53	-20	-32		-36	-56	0	-33	0	-38	0	-57	0	+20	+17
Communications	+19	+7	-30	+50	+24		-28	-7	+36	+29	+75	+29	0	-29	+38	+7	-15
Preliminary works, etc.	-34	-18	-15	-24	-24		-47	-38	+7	+9	+35	+31	+23	+38	+27	-4	-32

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
In the Next 12 Months																	
New Work																	
By Country																	
GB	+4	+6	+18	-8	+23		+11	+2	+47	+40	+47	+37	+45	+34	+34	+16	+16
England	+10	+21	+21	+3	+33		+25	+30	+51	+31	+59	+74	+56	+45	+51	+8	+25
Scotland	-6	-18	-46	-25	+30		-39	-36	+26	+42	-6	-11	+9	+16	-20	0	-13
Wales	0	-10	+37	-15	-32		+60	-29	+67	+64	+71	+17	+30	+10	+60	+19	+15
By Size of Firm																	
<115	-13	+14	-15	-5	+16		-16	-19	+5	+33	+36	+21	+32	+13	+19	-5	+8
115-299	+6	+5	0	0	+39		0	+18	+42	+28	+38	+54	+45	+54	+60	+6	+36
300-599	+25	0	+14	+10	+14		+18	-9	+63	+56	+38	+30	+29	+33	-25	+40	+25
600+	0	0	+100	-50	0		+100	+25	+71	+50	+100	+50	+100	+33	+100	0	-25
R&M																	
By Country																	
GB	-2	0	+4	-5	+15		+14	+7	+9	+14	+31	+20	+27	+18	+18	-2	-7
England	+2	+15	+9	-2	+26		+13	+21	+18	+11	+36	+40	+30	+3	+14	-6	-8
Scotland	-2	-3	-12	+3	+19		+5	+11	+21	+14	+10	-11	+5	+28	+7	+10	-22
Wales	-4	-53	+32	-35	-35		+79	-47	0	+10	+47	0	-17	+10	+60	0	-60
By Size of Firm																	
<115	+2	+20	-27	+8	+17		-12	-8	-6	+13	+34	+11	+25	0	+6	-3	-7
115-299	-7	-10	-8	-6	+22		0	+9	0	+24	+30	+25	+50	+33	+60	-7	+11
300-599	0	-13	+29	0	+40		+18	-9	+25	+13	+15	+11	+17	+33	-25	0	-10
600+	0	0	+33	-33	-50		+100	+50	+14	0	+67	+50	0	0	+50	0	-25

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.

***In order to collect more detailed information of the sector, electricity has been spilt into three categories from 2021 Q2; renewable, non-renewable and nuclear & nuclear decommissioning.

5 Employment

	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	+6	+1	+20	-1	+17		-10	-5	+7	+22	+39	+33	+49	+44	+55	+33	+35
England	+14	-10	+36	+3	+27		-3	-20	-18	+2	+31	+62	+63	+33	+63	+53	+46
Scotland	-8	+10	-8	-3	-3		-22	+19	+41	+19	+48	+15	+68	+48	+33	+31	+19
Wales	-12	-23	+32	-20	+7		-60	+5	0	+86	+71	-17	0	+70	+60	-63	+15
Other operatives																	
GB	+3	-2	+15	-10	+13		-26	-14	+6	+17	+40	+29	+38	+39	+45	+35	+24
England	+8	-18	+20	-8	+26		-14	-33	-16	0	+36	+64	+61	+14	+60	+55	+44
Scotland	-4	0	-12	-6	-12		-39	+9	+45	+9	+45	0	+47	+63	0	+34	+2
Wales	-8	-14	+37	-45	0		-79	+5	0	+86	+71	-17	-30	+80	+60	-44	-15
Staff																	
GB	+9	+5	+29	+7	+30		-25	-18	-2	+27	+20	+20	+36	+36	+58	+33	+36
England	+5	0	+25	0	+32		-20	-31	-28	+8	+8	+38	+51	+14	+68	+45	+47
Scotland	+12	0	-12	+19	+12		-43	+15	+33	+32	+10	0	+50	+59	+40	+10	+15
Wales	-21	-5	+37	+5	+34		-47	+5	0	+86	+71	-17	-40	+80	+40	-25	+33
By Size of Firm																	
Skilled operatives																	
<115	+2	+9	+12	+3	+11		-3	-5	-8	+24	+12	+21	+32	+13	+6	+8	0
115-299	-3	+27	+13	+5	+18		-4	-4	+33	+17	+19	+38	+27	+50	+40	+19	+23
300-599	+11	0	+25	-10	+13		-27	-9	0	+33	+46	+30	+57	+50	+75	+47	+42
600+	+25	-67	+33	0	+50		0	0	0	0	+100	+50	+100	+67	+100	+67	+75
Other operatives																	
<115	+6	+16	0	-5	+6		-18	-19	-5	+9	+18	+26	+29	+9	+19	+8	+7
115-299	-6	+19	-7	+5	+11		-22	-13	+29	+13	+19	+33	+20	+43	+40	+38	+27
300-599	0	-10	+38	-20	+13		-45	-20	0	+33	+46	+20	+29	+67	+25	+40	+17
600+	+25	-67	+33	-25	+50		0	0	0	0	+100	+50	+100	+33	+100	+67	+50
Staff																	
<115	+6	+19	-6	+17	+30		-15	-10	-11	+18	+6	-5	+24	+13	+13	+5	+4
115-299	-3	+14	+7	0	+14		-22	-4	+29	+31	+19	+50	+50	+36	+40	+31	+32
300-599	+22	0	+38	+10	+50		-45	-18	-13	+22	+23	+20	+29	+33	+75	+53	+36
600+	+25	-33	+100	0	+50		0	-50	-14	+50	+33	0	+50	+67	+100	+33	+75

Weighted % Balance of Respondents

6 Expected Employment

	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	+9	+11	+15	+10	+26		+18	+18	+53	+50	+54	+46	+51	+46	+50	+31	+28
England	+6	+24	+5	+13	+38		+31	+28	+50	+33	+60	+79	+59	+45	+57	+39	+37
Scotland	+8	-10	-12	+3	+21		-39	+6	+55	+50	+23	+26	+50	+40	+27	+28	-2
Wales	+25	+10	+37	-15	-27		+67	+26	+67	+93	+76	-17	+50	+50	+60	-56	+38
Employment of staff																	
GB	+12	+19	+20	+11	+20		+4	+10	+51	+49	+49	+45	+44	+38	+63	+29	+28
England	+1	+26	+13	+14	+28		+13	+14	+51	+29	+59	+76	+56	+43	+80	+34	+44
Scotland	+17	0	-8	+3	+24		-43	+6	+36	+50	+13	+11	+36	+24	+20	+31	-9
Wales	+25	0	+37	-15	-18		+71	+16	+67	+93	+71	-17	+30	+10	+60	-31	+54
By Size of Firm																	
Operative jobs																	
<115	+11	+24	-9	+8	+20		-3	-2	+8	+42	+58	+26	+44	+26	+25	+13	+30
115-299	+3	+5	+7	+16	+44		+17	+30	+63	+50	+29	+69	+73	+54	+60	+13	+32
300-599	0	+11	+14	+30	+14		+9	+18	+63	+56	+54	+40	+14	+67	+25	+40	+25
600+	+33	0	+67	-25	0		+100	+25	+71	+50	+100	+50	+100	+33	+100	+67	+25
Employment of staff																	
<115	+9	+15	-6	+8	+24		-22	-10	+3	+33	+39	+21	+20	+22	+19	+15	+30
115-299	0	+29	+21	+21	+32		+9	+26	+42	+44	+33	+69	+73	+62	+100	+13	+41
300-599	+25	+22	+14	+30	0		-9	+18	+63	+67	+46	+40	+14	+33	+50	+33	+17
600+	+33	0	+67	-25	0		+100	0	+86	+50	+100	+50	+100	+33	+100	+67	+25

Weighted % Balance of Respondents

7 Costs*

	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	0	+1	0		0	+1	+1	0	+1	0	0	0	0	+1	+1
Unchanged	+2	+1	0	0	+3		+4	+5	+1	0	0	0	0	0	0	0	0
Slower	+10	+7	+13	+18	+11		+24	+23	+19	+19	+1	+1	+2	0	0	+1	0
Same rate	+85	+86	+81	+79	+82		+63	+63	+70	+63	+43	+47	+32	+16	0	+9	+8
Faster	+3	+5	+6	+2	+5		+9	+8	+9	+18	+55	+52	+66	+84	+100	+89	+91
Cost Balances																	
By Country																	
GB	+86	+91	+87	+80	+84		+68	+65	+76	+81	+97	+99	+98	+100	+100	+98	+99
England	+79	+87	+76	+65	+82		+59	+54	+75	+68	+96	+98	+97	+100	+100	+98	+96
Scotland	+96	+93	+92	+91	+91		+87	+72	+83	+81	+97	+100	+100	+100	+100	+97	+100
Wales	+92	+95	+100	+90	+79		+93	+75	+86	+100	+100	+100	+90	+100	+100	+100	+100
By Size of Firm																	
<115	+78	+84	+74	+74	+79		+69	+58	+61	+88	+88	+95	+92	+100	+100	+93	+93
115-299	+79	+95	+93	+80	+82		+52	+57	+86	+89	+100	+100	+100	+100	+100	+100	+100
300-599	+100	+90	+88	+90	+88		+73	+73	+88	+78	+100	+100	+100	+100	+100	+100	+100
600+	+100	+100	+100	+75	+100		+100	+75	+71	+50	+100	+100	+100	+100	+100	+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

8 Tender Prices	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+46	+39	+62	+39	+29		+20	+15	+39	+54	+82	+92	+89	+85	+96	+96	+87
England	+57	+31	+60	+56	+34		+18	+11	+24	+42	+84	+90	+95	+81	+94	+99	+89
Scotland	+17	+22	+27	+13	+19		+26	+20	+45	+64	+68	+93	+86	+80	+100	+90	+85
Wales	+46	+64	+95	+32	+11		+33	+28	+67	+93	+100	+83	+50	+100	+100	+100	+62
By Size of Firm																	
<115	+43	+26	+26	+25	+24		+24	+5	+24	+59	+70	+78	+76	+87	+88	+85	+81
115-299	+50	+33	+73	+42	+11		+17	+5	+47	+39	+79	+85	+100	+100	+100	+100	+86
300-599	+50	+67	+63	+60	+63		+9	+45	+63	+67	+85	+100	+86	+83	+100	+100	+83
600+	+33	+33	+100	+25	+50		+50	0	+29	+50	+100	+100	+100	+67	+100	+100	+100
R&M																	
By Country																	
GB	+36	+38	+52	+40	+23		+17	+14	+32	+40	+78	+85	+81	+83	+93	+86	+85
England	+39	+27	+28	+49	+31		+14	+12	+15	+36	+82	+88	+85	+75	+89	+89	+87
Scotland	+15	+30	+42	+25	+29		+39	+22	+55	+41	+65	+89	+85	+80	+100	+76	+89
Wales	+50	+55	+84	+21	0		+21	+5	0	+50	+88	+50	+17	+100	+100	+100	+89
By Size of Firm																	
<115	+38	+23	+16	+25	+21		+17	+10	+23	+57	+69	+63	+75	+87	+88	+88	+78
115-299	+29	+25	+46	+24	+12		+5	+5	+18	+31	+63	+83	+100	+92	+80	+100	+84
300-599	+50	+70	+63	+70	+67		+18	+36	+63	+50	+83	+90	+67	+83	+100	+71	+82
600+	+33	+33	+100	+33	0		+50	0	+29	0	+100	+100	+100	+67	+100	+100	+100

Weighted % Balance of Respondents

9 Supply of Resources Required

9 Supply of Resources Required	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4
Skilled Operatives																	
GB	39	32	44	40	52		23	32	29	53	50	66	60	66	64	75	69
England	40	32	42	45	52		28	28	18	39	40	69	51	57	60	72	68
Scotland	44	45	46	53	63		22	47	55	64	65	74	68	76	67	79	68
Wales	38	9	0	10	36		13	35	67	64	94	58	50	80	80	81	77
Other Operatives																	
GB	26	16	11	16	15		13	10	16	30	33	52	39	51	48	63	46
England	19	8	16	22	18		17	12	14	16	34	55	41	43	49	66	49
Scotland	35	33	19	13	19		18	6	33	44	26	37	32	60	40	52	47
Wales	33	5	0	5	11		0	5	0	29	47	58	50	80	60	88	77
Staff																	
GB	31	33	26	28	30		13	19	16	39	41	43	42	55	38	58	50
England	12	31	22	36	19		18	22	7	31	41	55	44	62	46	65	56
Scotland	54	48	23	25	38		13	13	21	44	19	19	23	32	27	55	38
Wales	50	9	0	5	32		0	5	67	57	71	50	50	80	0	38	69
Plant																	
GB	2	2	4	4	3		1	4	4	8	23	20	22	29	11	25	16
England	3	2	2	9	0		2	3	4	6	27	17	10	29	6	33	16
Scotland	0	3	0	0	3		0	6	5	11	32	37	32	24	20	10	11
Wales	4	0	0	0	0		0	5	0	0	0	0	40	40	0	6	31
Materials and Products																	
GB	1	7	1	10	1		14	15	13	29	73	76	61	65	58	47	26
England	0	13	0	8	2		5	6	7	31	71	74	63	64	76	58	25
Scotland	0	3	4	0	0		13	19	19	31	74	81	59	64	20	38	19
Wales	4	5	0	0	0		13	5	0	7	76	50	40	40	33	25	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 2022 Q4 survey totalled 75. 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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