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Workload Trends 2019 Q3

Decrease in activity and broad weakness in new orders

Weighted Balances (%)

Change on 12 Months Ago

Workload

2018 Q3	+10
2019 Q3	-1

Tender Prices

New Work

2018 Q3	+60
2019 Q3	+39

R&M Work

2018 Q3	+47
2019 Q3	+40

Order Books

2018 Q3	+15
2019 Q3	-16

Over the Next 12 Months

Expected Workload

2018 Q3	+27
2019 Q3	0

Expected Orders

New Work

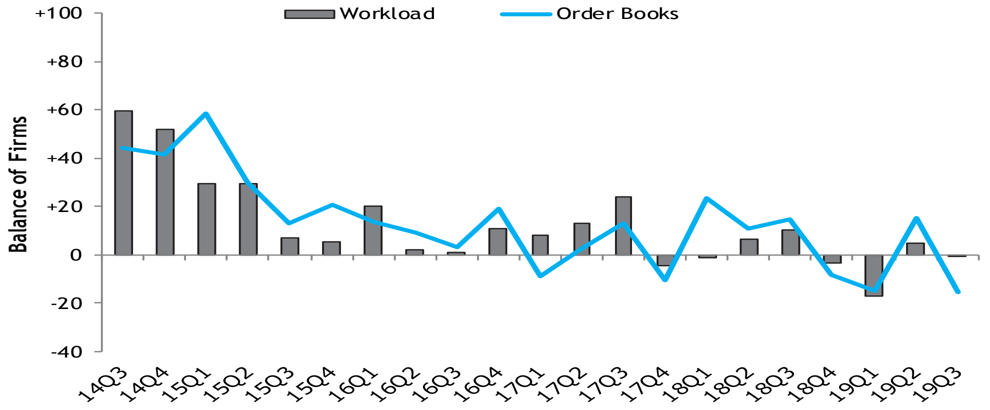
2018 Q3	+21
2019 Q3	-8

R&M Work

2018 Q3	+10
2019 Q3	-5

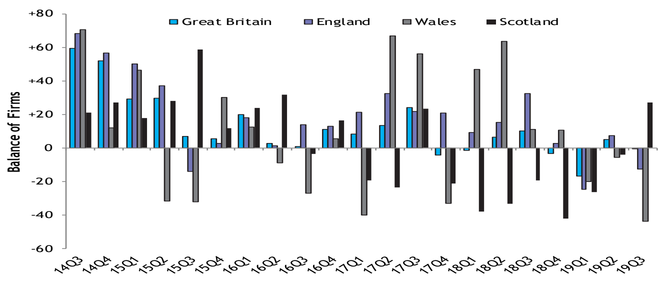
- Workloads decreased in Q3, according to 1% of British firms, on balance.
- 8 out of 10 sectors reported decreasing workloads, on balance, including water and sewerage and railways.
- Order books decreased for 16% of firms on balance, and 8% expect new orders to fall during the next 12 months.
- Employment of skilled operatives and other operatives was reported to have decreased in Q3.
- 80% of firms, on balance, reported an increase in costs, the lowest balance in over a year.

Change in Workloads and Order Books - Great Britain



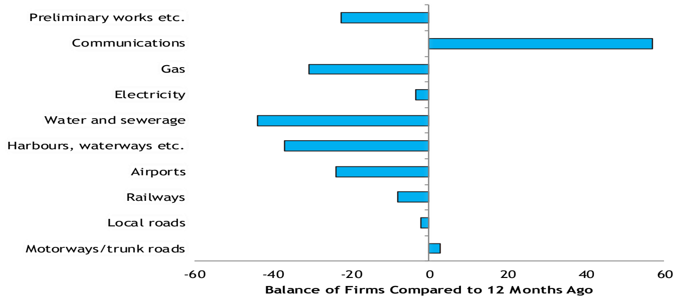
Trends in Workload

Workloads Compared to 12 Months Ago



Workloads in Great Britain decreased, on balance, in the third quarter of 2019. In Great Britain, 1% of firms, on balance, reported a decrease in workloads on a year ago, compared to a balance of 5% in Q2 that reported that workloads rose. Overall, 33% of the respondents reported that workloads had increased, and 34% of the respondents reported that workloads had decreased. For England, 13% of firms, on balance, reported a decrease in workloads in Q3, following a positive balance (7%) in Q2. In Scotland, workloads increased in Q3, according to 27% of firms, on balance. This was the highest balance since 2016 Q2 and compares to a balance of –4% in Q2. In Wales, 44% of firms, on balance, reported a decrease in workloads in Q3,marking the third consecutive quarter of decline and the lowest balance since 2013 Q1.

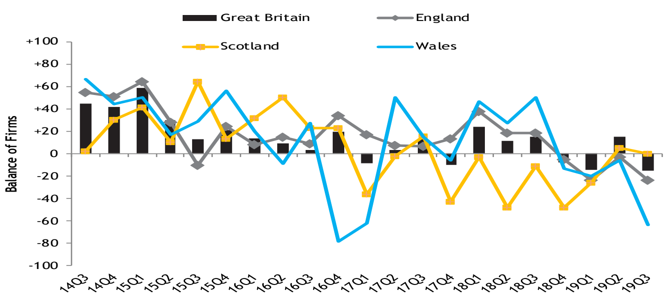
Workload — By Type of Work (GB)



In Great Britain, workloads were reported to have fallen in 8 out of 10 sectors, on balance, in Q3. The sector that reported the weakest balance in workloads in Q3 was water and sewerage, with 44% of firms reporting a decline, on balance. This was followed by harbours and waterways (-37%), gas (-31%), airports (-24%), preliminary works (-22%), railways (-8%), electricity (-3%)and local roads (-2%). For local roads, this marked the seventeenth consecutive quarter of decline. Meanwhile, two sectors experienced increases in workloads in Q3. Workloads in motorways/trunk roads were reported to have increased by 3% of firms, on balance, whilst in communications, a balance of 57% reported a rise in workloads, marking the highest balance on record in the survey.

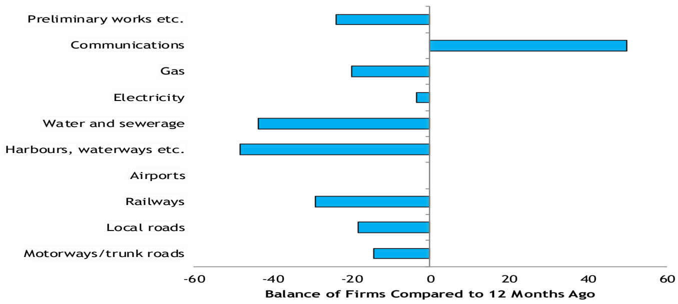
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



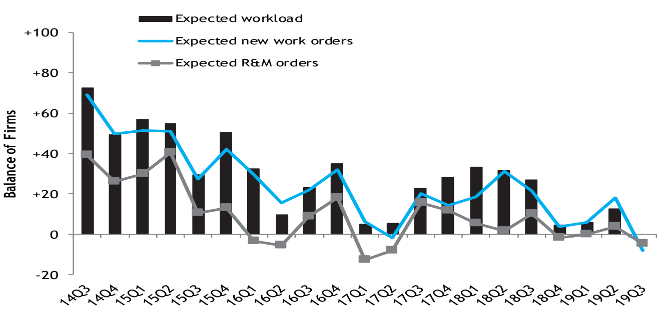
Order books worsened in Great Britain during the third quarter of 2019. On balance, 16% of firms reported a decrease in orders compared to a year earlier, compared to a balance of 15% reporting a rise in Q2. 26% of firms reported that orders had increased and 42% of firms reported that they had decreased. In England, 24% of firms, on balance, reported a decrease in orders in Q3, compared to a balance of –3% in Q2 and marking the fourth consecutive quarter of decline. Overall, 29% of firms reported that orders were unchanged, however. For a fourth consecutive quarter, orders in Wales decreased, on balance, according to 64% of firms and marking the lowest balance since 2016 Q4. In Scotland, equal proportions of firms reported that orders increased, decreased or were unchanged during Q3, resulting in a zero balance.

Order Books — By Type of Work (GB)



In Q3, eight sectors reported a decrease in orders compared to 12 months ago, on balance, for Great Britain. Harbours and waterways reported the largest negative balance, with 48% of firms reporting a decrease in orders. This was followed by water and sewerage (-44%), railways (-29%) and preliminary works (-24%). For the latter, this marked the fifth consecutive quarter of decline. The gas sector also recorded a fifth consecutive decline in orders, according to 20% of firms, on balance. Negative balances were also reported in local roads (-18%), motorways/trunk roads (-14%) and electricity (-3%). In airports, 48% of firms reported an increase in orders and 48% also reported a decline, resulting in a zero balance. Communications was the sole sector reporting an increase in order books in Q3, according to 50% of firms, on balance.

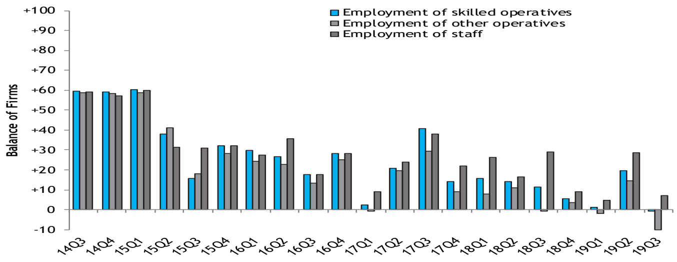
Expected Future Trends in the Next 12 Months



In Q3, 29% of firms in Great Britain reported that workloads are expected to increase in the next 12 months, and 29% also reported that workloads are expected to fall, resulting in a zero balance. In addition, 41% reported that workloads are expected to remain unchanged. In England, 8% of firms, on balance, expected workloads to increase. In contrast, 6% of firms in Wales and 15% of firms in Scotland, on balance, expected workloads to decrease. For new work orders, 8% of British firms expected a decrease in the next 12 months, on balance. By nation; England (3%), Wales (-15%) and Scotland (-25%). For R&M orders, 5% of British firms, on balance, expected a decrease during the next 12 months. This figure is 2% for English firms and 35% for Welsh firms. However, 3% of Scottish firms expected R&M orders to increase, on balance.

Trends in Employment

Employment Compared to 12 months Ago (GB)



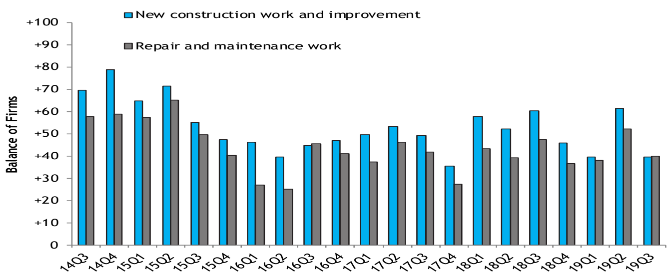
In Great Britain, for Q3, employment of skilled operatives and other operatives decreased according to a balance of 1% and 10% of firms, respectively, both recording the lowest balances since 2011 Q4. 7% of firms reported that employment of staff increased in Q3. In England, employment balances were +3% for skilled operatives, -8% for other operatives and 0% for staff. In Wales, employment of skilled operatives and other operatives decreased for balances of 20% and 45% of firms, respectively, but employment of staff was reported to have risen for 5% of firms, on balance. In Scotland, employment of skilled operatives and other operatives decreased for balances of 3% and 6%, respectively, but 19% of firms reported an increase in employment of staff, on balance.

Expected Employment in the Next 12 Months

Looking at employment expectations for the next 12 months, on balance, 11% of firms in Britain expected the employment of staff to increase and 10% expected the employment of operatives to increase. In England, on balance, 14% of firms expect the employment of staff to increase, and for operatives, a balance of 13% was recorded. Prospects in Scotland improved in Q3 compared to Q2, with 3% of firms expecting the employment of both operatives and staff to increase over the next 12 months. However, in Wales, employment expectations deteriorated from Q2, with 15% of firms expecting the employment of both operatives and staff, to decrease over the next 12 months.

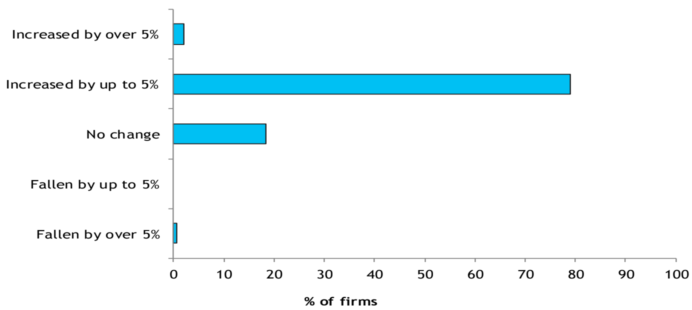
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



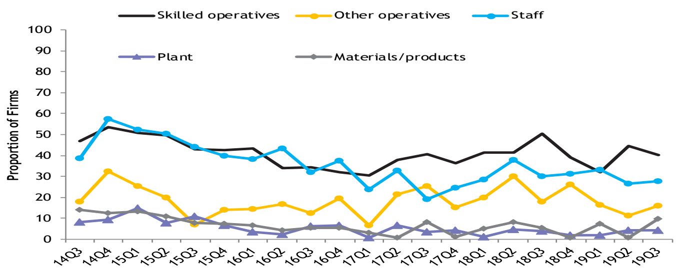
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 39% of firms for new construction work and improvement, and 40% for repair and maintenance work. In England, tender prices were higher, on balance, for 56% and 49% of firms for new construction work and improvement, and for repair and maintenance work, respectively. In Scotland, 13% of respondents reported an increase in tender prices for new construction work and improvement, and 25% for repair and maintenance, on balance. In Wales, on balance, 32% of respondents, reported an increase in tender prices for new construction work and improvement, and 21% reported increases for repair and maintenance. Both balances were the lowest since 2017 Q1.

Costs Compared with 12 Months Ago (GB)



In Q3, 80% of firms in Great Britain reported an increase in costs, on balance, down from 87% in Q2. Overall, 79% of firms reported that costs increased by up to 5% compared to 12 months earlier and 2% reported increases of over 5%. In England, 65% of firms, on balance, reported an increase in costs, down from 76% in Q2 and the lowest since 2016 Q3. 2% of firms reported rises of over 5%, 65% by up to 5%, whilst 2% of firms reported decreases. In Scotland, costs increased, on balance, according to 91% of firms with 6% of firms reporting increases of over 5%, 84% by up to 5%, whilst no firms reported decreases. In Wales, 90% of firms, on balance, reported an increase in costs over the last 12 months, For the seventh consecutive quarter, no firms in Wales reported that costs had decreased, but 10% reported that there had been no change in costs in Q3.

Contractors Unsatisfied with Supply (GB)



Overall, civil engineering firms reported continued difficulties with the supply of suitable workers in Q3. In Great Britain, 40% and 28% of respondents reported dissatisfactory supply of skilled operatives and staff, respectively. The percentage reporting dissatisfaction in supply of other operatives was 16% in Q3, up from 11% in Q2. For supply of materials/products, 10% of firms, on balance reported dissatisfaction, the highest balance since 2015 Q2. For plant, on balance, 4% of firms reported dissatisfaction with supply. The most commonly reported dissatisfaction with supply in Q3 was for skilled operatives in England (45%) and Scotland (53%). 36% of firms in England and 25% of firms in Scotland were also dissatisfied with the supply of staff. 10% of Welsh firms reported dissatisfaction with the supply of skilled operatives in Q3.

Workload Trends Survey

1 Workload	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3
Compared with 12 Months Ago																	
By Country																	
GB	+7	+5	+20	+2	+1	+11	+8	+13	+24	-4	-1	+6	+10	-3	-17	+5	-1
England	-14	+3	+18	+1	+14	+13	+21	+32	+22	+21	+9	+15	+33	+3	-25	+7	-13
Scotland	+59	+12	+24	+32	-4	+16	-20	-24	+23	-21	-38	-33	-19	-42	-26	-4	+27
Wales	-32	+30	+13	-9	-27	+6	-40	+67	+56	-33	+47	+64	+11	+11	-20	-6	-44
By Size of Firm																	
<115	+6	0	-16	-6	+2	+3	+19	0	+17	-20	-26	-2	+8	+3	+8	0	+3
115-299	+4	-12	-4	0	+30	+16	+45	+32	+29	+4	-8	+22	+19	-3	-11	-8	-5
300-599	+50	+11	+30	0	-9	+25	+25	+13	+75	+57	0	0	-13	-13	-20	0	0
600+	-8	+16	+48	+7	-13	+5	-18	0	0	-100	+67	0	+50	0	-67	+50	0
By Type of Work																	
Motorways & trunk roads	-12	-7	-29	-11	-21	-4	-14	-15	+5	-10	+8	-10	-13	+6	+2	-1	+3
Local roads	-24	-31	-16	-11	-27	-13	-22	-16	-19	-24	-15	-21	-21	-15	-27	-1	-2
Railways	-18	-5	+15	+13	-2	-30	-1	-8	-38	-32	+4	-13	-13	-28	-20	+11	-8
Airports	+12	-20	-10	-9	+3	-18	+5	+17	+8	0	+22	+19	-9	-7	-37	+30	-24
Harbours, waterways etc.	-5	-5	-10	-26	-32	-23	-12	-5	-1	-28	-15	+9	+4	+8	-21	-19	-37
Water & sewerage	-22	-9	+16	-19	-7	+1	-16	-10	-6	+1	-14	+10	-1	-13	-19	+36	-44
Electricity	+6	+22	+16	+28	-7	+8	-16	-16	+24	-8	+11	+12	+12	-33	-46	+14	-3
Gas	+6	-32	-55	-75	+21	+14	+29	+57	+57	+6	0	+42	-58	-11	+6	-53	-31
Communications	+3	+23	0	+42	+14	+13	-54	-21	+33	+28	0	+21	-13	+15	+54	-22	+57
Preliminary works, etc.	+22	+41	+33	+19	+9	+26	+37	+11	+12	+10	+3	+2	+3	-9	-8	-25	-22

Weighted % Balance of Respondents

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

Weighted % Balance of Respondents

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

Weighted % Balance of Respondents

4 Expected Trends in New Orders	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3
In the Next 12 Months																	
New Work																	
By Country																	
GB	+27	+42	+29	+16	+22	+32	+6	-2	+20	+14	+19	+31	+21	+4	+6	+18	-8
England	+4	+59	+45	+42	+48	+57	+40	+3	+20	+36	+13	+49	+21	+10	+21	+21	+3
Scotland	+47	+27	+26	+8	-12	-12	-52	-42	+6	-23	0	-26	-18	-6	-18	-46	-25
Wales	+20	+13	+12	-57	+14	-11	-68	+42	0	+25	+18	+70	+45	0	-10	+37	-15
By Size of Firm																	
<115	+21	+33	+18	0	-4	+21	+2	+5	+7	+2	+2	+10	+7	-13	+14	-15	-5
115-299	+41	+19	+19	+10	+18	+34	+48	+16	+42	+12	+14	+44	+35	+6	+5	0	0
300-599	+55	+64	+42	-67	+31	0	0	+22	+33	+44	+71	+33	+38	+25	0	+14	+10
600+	+12	+50	+34	+42	+33	+51	-6	-75	0	0	0	+50	0	0	0	+100	-50
R&M																	
By Country																	
GB	+10	+13	-4	-6	+9	+18	-13	-8	+15	+12	+5	+1	+10	-2	0	+4	-5
England	-10	+26	-3	+11	+41	+40	+8	-10	+18	+30	+1	+20	+17	+2	+15	+9	-2
Scotland	+36	+19	+23	-16	-14	-14	-43	-18	+7	0	-3	-31	-15	-2	-3	-12	+3
Wales	+4	-29	-31	-35	-5	-17	-68	+8	0	-10	+6	+5	+5	-4	-53	+32	-35
By Size of Firm																	
<115	-7	+17	+2	-16	0	0	+5	-2	-2	-8	+4	-8	+14	+2	+20	-27	+8
115-299	+25	-4	+23	+7	+4	+15	+19	+5	+24	+13	-4	+19	+31	-7	-10	-8	-6
300-599	+30	+55	0	-17	+8	0	0	+22	+33	+25	+29	-11	-13	0	-13	+29	0
600+	+3	0	-21	-6	+18	+37	-35	-75	+25	+50	0	0	0	0	0	+33	-33

Weighted % Balance of Respondents

5 Employment

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

Weighted % Balance of Respondents

6 Expected Employment

	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	+35	+44	+42	+24	+24	+27	+12	+13	+28	+29	+37	+28	+29	+9	+11	+15	+10
England	+25	+66	+52	+40	+54	+48	+26	+15	+28	+45	+36	+45	+15	+6	+24	+5	+13
Scotland	+51	+30	+51	+30	-15	-2	-29	-33	+3	+8	+11	-6	+4	+8	-10	-12	+3
Wales	+20	+8	+15	-43	+14	-11	-25	+42	+25	+35	+76	+70	+55	+25	+10	+37	-15
Employment of staff																	
GB	+40	+39	+39	+30	+19	+40	+15	+14	+28	+21	+35	+28	+25	+12	+19	+20	+11
England	+31	+53	+52	+47	+51	+62	+28	+19	+27	+44	+37	+42	+15	+1	+26	+13	+14
Scotland	+49	+34	+44	+24	-12	+2	-27	-22	+13	-13	+11	-9	+7	+17	0	-8	+3
Wales	+4	-4	+19	-39	+18	+33	-11	+42	+25	+30	+65	+70	+25	+25	0	+37	-15
By Size of Firm																	
Operative jobs																	
<115	+12	+31	+16	+18	+13	+10	+14	+17	+11	+6	+14	+14	+24	+11	+24	-9	+8
115-299	+34	+19	+36	+26	+29	+34	+43	+16	+38	+27	+21	+52	+41	+3	+5	+7	+16
300-599	+55	+73	+50	-50	+15	+11	0	+33	+67	+67	+71	+22	+38	0	+11	+14	+30
600+	+37	+50	+53	+42	+33	+37	+3	-25	+25	+33	+75	0	0	+33	0	+67	-25
Employment of staff																	
<115	+14	+21	+14	+13	+13	+13	+16	+3	+7	+2	+16	+12	+24	+9	+15	-6	+8
115-299	+41	+20	+39	+19	+25	+28	+52	+33	+42	+27	+21	+48	+35	0	+29	+21	+21
300-599	+45	+45	+50	-50	+15	+33	+11	+33	+67	+33	+71	+33	+25	+25	+22	+14	+30
600+	+47	+54	+44	+59	+21	+65	+3	-25	+25	+33	+67	0	0	+33	0	+67	-25

Weighted % Balance of Respondents

7 Costs*

	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	+0	0	0	0	0	0	0	+1	+1	0	0	0	0	0	+1
Unchanged	+1	+2	+5	+7	+12	+1	+1	+1	0	+2	+1	+6	0	+2	+1	0	0
Slower	+9	+13	+15	+19	+18	+9	+15	+15	+18	+11	+12	+12	+11	+10	+7	+13	+18
Same rate	+78	+71	+71	+54	+59	+74	+70	+71	+69	+81	+79	+72	+86	+85	+86	+81	+79
Faster	+12	+14	+8	+19	+11	+16	+14	+14	+13	+5	+7	+9	+3	+3	+5	+6	+2
Cost Balances																	
By Country																	
GB	+90	+83	+74	+67	+58	+88	+84	+84	+82	+82	+84	+75	+89	+86	+91	+87	+80
England	+90	+90	+81	+82	+60	+90	+90	+75	+71	+88	+83	+82	+85	+79	+87	+76	+65
Scotland	+100	+82	+98	+85	+79	+93	+94	+91	+97	+71	+73	+72	+91	+96	+93	+92	+91
Wales	+64	+96	+50	+4	+18	+67	+57	+100	+100	+85	+100	+95	+90	+92	+95	+100	+90
By Size of Firm																	
<115	+79	+76	+68	+74	+63	+80	+81	+84	+83	+74	+83	+81	+74	+78	+84	+74	+74
115-299	+77	+81	+68	+67	+69	+79	+74	+78	+79	+82	+82	+82	+94	+79	+95	+93	+80
300-599	+91	+82	+92	+50	+69	+90	+89	+100	+100	+100	+100	+80	+100	+100	+90	+88	+90
600+	+100	+88	+72	+68	+41	+100	+87	+75	+75	+75	+75	+33	+100	+100	+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.

8 Tender Prices

8 Tender Prices	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+55	+47	+46	+39	+45	+47	+50	+53	+49	+36	+58	+52	+60	+46	+39	+62	+39
England	+38	+61	+56	+53	+45	+53	+55	+52	+51	+55	+75	+72	+52	+57	+31	+60	+56
Scotland	+58	+23	+54	+39	+63	+45	+51	+51	+38	+4	+19	+13	+32	+17	+22	+27	+13
Wales	+48	+42	+27	+4	+18	-11	+32	+92	+63	+45	+71	+90	+90	+46	+64	+95	+32
By Size of Firm																	
<115	+33	+35	+20	+33	+28	+16	+36	+29	+38	+22	+27	+41	+46	+43	+26	+26	+25
115-299	+37	+27	+31	+23	+48	+48	+39	+58	+48	+27	+50	+63	+59	+50	+33	+73	+42
300-599	+73	+55	+67	+33	+69	+60	+44	+78	+100	+89	+86	+70	+88	+50	+67	+63	+60
600+	+66	+62	+56	+51	+36	+54	+61	+50	+50	0	+100	0	+50	+33	+33	+100	+25
R&M																	
By Country																	
GB	+49	+40	+27	+25	+46	+41	+37	+46	+42	+27	+43	+39	+47	+36	+38	+52	+40
England	+37	+63	+39	+29	+62	+46	+33	+41	+43	+37	+49	+53	+44	+39	+27	+28	+49
Scotland	+59	+23	+44	+33	+60	+42	+46	+38	+21	-12	+15	+10	+27	+15	+30	+42	+25
Wales	+48	+17	-15	+13	0	-11	+46	+83	+63	+45	+59	+85	+75	+50	+55	+84	+21
By Size of Firm																	
<115	+29	+39	+17	+26	+30	+19	+14	+20	+31	+19	+24	+32	+36	+38	+23	+16	+25
115-299	+27	+32	+24	+21	+33	+30	+38	+52	+42	+35	+42	+48	+40	+29	+25	+46	+24
300-599	+70	+45	+11	+33	+54	+60	+44	+67	+67	+75	+86	+50	+71	+50	+70	+63	+70
600+	+59	+43	+38	+25	+58	+50	+43	+50	+50	-25	+33	0	+50	+33	+33	+100	+33

Weighted % Balance of Respondents

9 Supply of Resources Required

9 Supply of Resources Required	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3
Skilled Operatives																	
GB	43	43	43	34	34	32	30	38	41	36	41	42	50	39	32	44	40
England	41	49	44	38	39	25	39	36	31	37	39	40	63	40	32	42	45
Scotland	33	45	51	49	32	55	40	24	38	42	51	49	46	44	45	46	53
Wales	0	21	27	17	45	0	7	67	69	0	29	0	15	38	9	0	10
Other Operatives																	
GB	7	14	14	17	12	19	7	21	25	15	20	30	18	26	16	11	16
England	4	14	11	16	12	14	12	15	16	11	15	26	15	19	8	16	22
Scotland	9	4	20	23	15	37	3	16	31	23	32	33	33	35	33	19	13
Wales	0	13	0	17	5	0	0	33	25	0	24	0	5	33	5	0	5
Staff																	
GB	44	40	38	43	32	37	24	33	19	24	29	38	30	31	33	26	28
England	35	44	44	54	30	35	31	30	18	32	32	33	33	12	31	22	36
Scotland	62	41	37	43	38	36	21	22	25	19	27	44	25	54	48	23	25
Wales	16	17	8	17	0	22	0	33	0	0	0	0	0	50	9	0	5
Plant																	
GB	11	7	3	2	6	6	1	6	3	4	1	4	4	2	2	4	4
England	6	1	3	2	4	3	1	5	5	8	1	7	0	3	2	2	9
Scotland	7	9	2	5	5	8	2	0	0	0	0	3	14	0	3	0	0
Wales	0	8	8	0	23	22	0	0	0	0	6	0	0	4	0	0	0
Materials and Products																	
GB	8	7	7	4	5	6	3	1	8	1	5	8	6	1	7	1	10
England	3	5	3	1	9	5	5	2	10	3	4	10	4	0	13	0	8
Scotland	21	2	9	15	2	8	3	0	9	0	3	13	11	0	3	4	0
Wales	0	0	0	0	0	0	0	0	0	0	0	0	0	4	5	0	0

% of Respondents Reporting Unsatisfactory Availability of Resources

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

The number of contractors taking part in CECA's 2019 Q3 survey totalled 79. 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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