



Workload Trends 2017 Q4

Activity falls but outlook remains optimistic

Weighted Balances (%)

Change on 12 Months Ago

Workload	
2016 Q4	+11
2017 Q4	-4

Tender Prices

New Work	
2016 Q4	+47
2017 Q4	+36

R&M Work	
2016 Q4	+41
2017 Q4	+27

Order Books	
2016 Q4	+19
2017 Q4	-10

Over the Next 12 Months

Expected Workload	
2016 Q4	+35
2017 Q4	+28

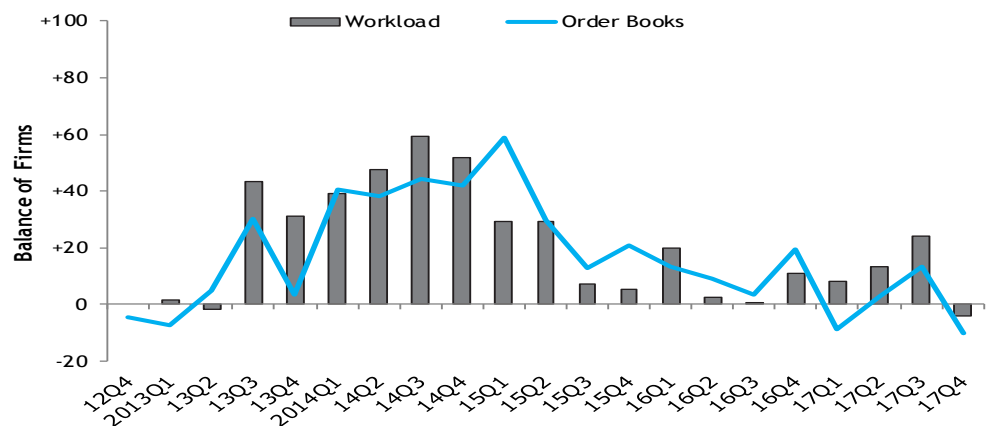
Expected Orders

New Work	
2016 Q4	+32
2017 Q4	+14

R&M Work	
2016 Q4	+18
2017 Q4	+12

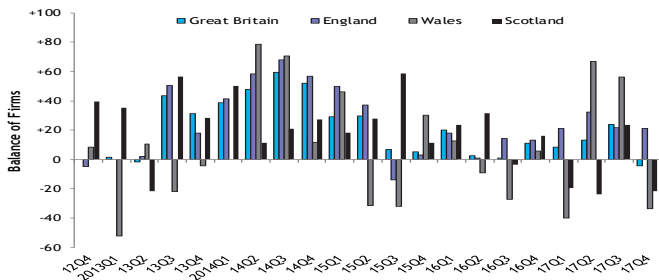
- For the first time in nearly four years, workloads fell in Q4, according to 4% of British firms, on balance.
- 5 out of 10 sectors reported falling workloads, on balance, with railways recording the weakest balance (-32%).
- Order books decreased for 10% of British firms on balance, but 28% expect increased workloads during the next 12 months.
- Employment balances for all types of worker weakened from Q3, but firms remained optimistic for 2018.
- 36% of firms reported higher tender prices, on balance for new construction work, the lowest in nearly four years.

Change in Workloads and Order Books - Great Britain



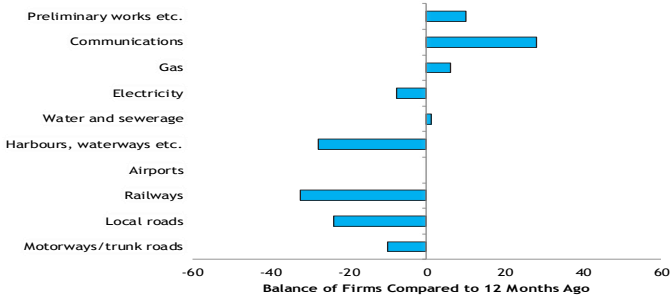
Trends in Workload

Workloads Compared to 12 Months Ago



For the first time since 2013 Q2, workloads declined in Great Britain during the fourth quarter of 2017. On balance, 4% of firms reported a decrease in workloads on a year ago, compared to 24% in Q3 that reported that workloads had increased. Overall, 35% of the respondents reported that workloads had fallen, and 31% of the respondents reported that workloads had increased. England was the only nation that reported continued growth in Q4, with 21% of firms, on balance, reporting rising workloads. However, in Scotland, 21% of firms, on balance, reported a decrease in workloads in Q4, compared to 23% that reported workloads had risen in Q3. Wales reported the weakest balance, with 33% of firms reporting falling workloads in Q4, following two previous quarters showing a positive balance.

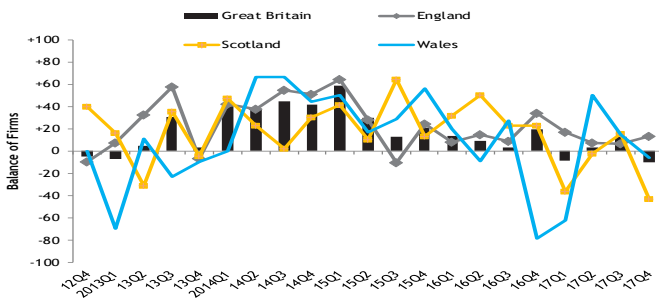
Workload – By Type of Work (GB)



5 out of 10 sectors reported that workloads fell compared to a year earlier, on balance. The sector that reported the weakest balance in workloads in Q4 was railways, with 32% of firms reporting a decline. This marked the sixth consecutive quarter of decline. Both local roads (-24%) and harbours and waterways (-28%) remained negative in Q4 for a tenth consecutive quarter. Following positive balances in Q3, both motorways/trunk roads (-10%) and electricity (-8%) also reported negative balances in Q4. Meanwhile, four sectors reported increasing workloads in Q4, with communications recording the strongest balance (28%). Workloads in preliminary works (10%), gas (6%) and water and sewerage (1%) also increased in Q4. For airports, a zero balance was reported in Q4, with 38% of respondents reporting unchanged workloads.

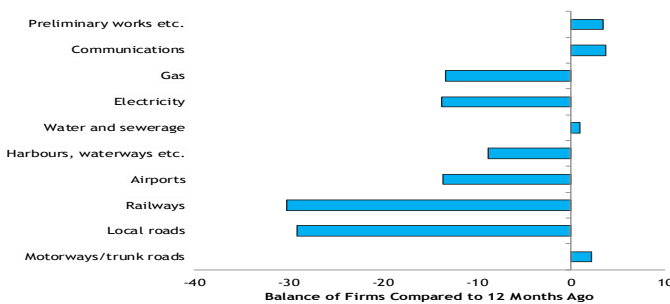
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



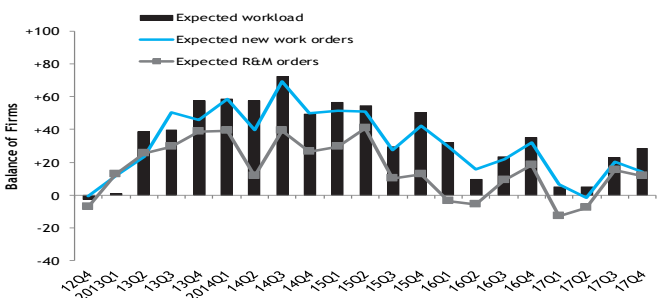
Orders compared to 12 months ago decreased on balance, according to 10% of firms in Great Britain. This compares to a balance of 13% reporting a rise in Q3 and was the lowest balance since 2012 Q3. 43% of firms reported that orders had decreased and 32% of firms reported that orders had increased. For England, 13% of firms, on balance, reported an increase in orders in Q4, up from 7% in Q3. Overall, 41% of firms reported that orders had increased and 28% reported that they had decreased. After reporting a positive balance in Q3 (15%), orders declined according to 43% of firms, on balance, in Scotland. This was the lowest balance in seven years. Overall, 62% of firms reported that orders had decreased. In Wales, 53% of firms reported decreased orders, and 47% recorded increased orders, resulting in a negative balance of 6%.

Order Books – By Type of Work (GB)



In Q4, six sectors reported a decrease in orders compared to 12 months ago, on balance. The sectors that reported a decrease in orders in Q4 compared to 12 months ago, on balance, were railways (-30%), local roads (-29%) and gas (-13%). For local roads, this marked a tenth consecutive quarter of decline. Following positive balances in Q3, airports (-14%), electricity (-14%) and harbours and waterways (-9%) all reported negative balances in Q4. All other sectors reported an increase in orders compared to 12 months ago, on balance. 4% of firms, on balance, reported an increase in orders in both preliminary works and communications, whilst water and sewerage reported a positive balance (1%) following three consecutive quarters of decline. In motorways/trunk roads, 2% of respondents, on balance, also reported a rise in orders.

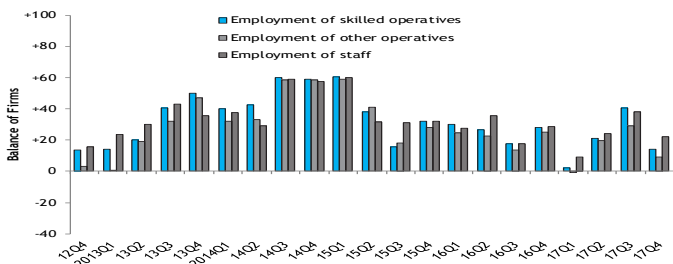
Expected Future Trends in the Next 12 Months



On balance, 28% of firms in Britain reported that workloads are expected to increase in the next 12 months, compared to a balance of 23% in Q3. In England, this figure was 50% and in Wales, 35% of firms, on balance, expected workloads to increase. However, in Scotland, 4% of firms, on balance, expected workloads to fall over the next 12 months. 14% of British firms expected new work orders to be higher in the next 12 months on balance. By nation; England (36%), Wales (25%) and Scotland (-23%). For R&M orders, 12% of British firms, on balance, expected an increase during the next 12 months. This figure is 30% for English firms, whilst 10% of Welsh firms expected R&M orders to decrease, on balance. Meanwhile, a zero balance was reported by Scottish firms.

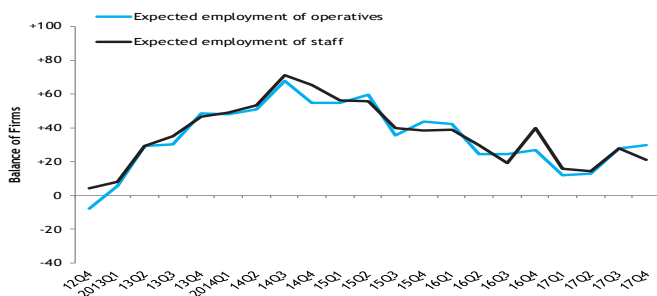
Trends in Employment

Employment Compared to 12 months Ago (GB)



Firms continued to report increases in employment in Q4, although the balances showed a deterioration from Q3. In Britain, on balance, employment of skilled operatives, other operatives and staff increased according to 14%, 9% and 22% of firms respectively. These balances were the lowest since 2017 Q1. In England, employment of skilled operatives, other operatives and staff increased according to 29%, 28% and 35% of firms respectively. In Wales, 35% and 40% of respondents reported increases in the employment of skilled operatives and staff respectively, but 5% reported a decrease in other operatives, on balance. In Scotland, employment decreased, on balance, according to 4% of firms for skilled operatives and 8% for other operatives, but 2% reported an increase in staff.

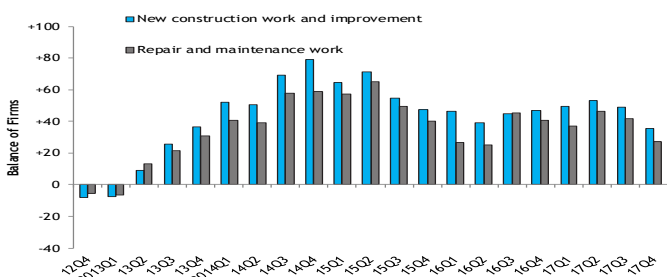
Expected Employment in the Next 12 Months



Looking at the next 12 months, on balance, 29% of firms in Britain expected the employment of operatives to increase and 21% expected the employment of staff to increase. In England, 45% and 44% of firms, on balance, anticipated a rise in operatives and staff employment, respectively. Both balances were the highest since 2016 Q4. In Wales, 35% and 30% of firms, on balance expected a rise in operatives and staff employment, respectively. Prospects in Scotland were mixed in Q4 compared to Q3. On balance, 8% of firms expected employment to increase for operatives, whilst 13% anticipated employment of staff to decrease.

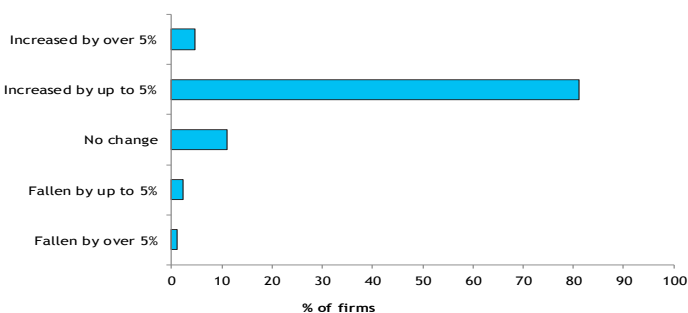
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



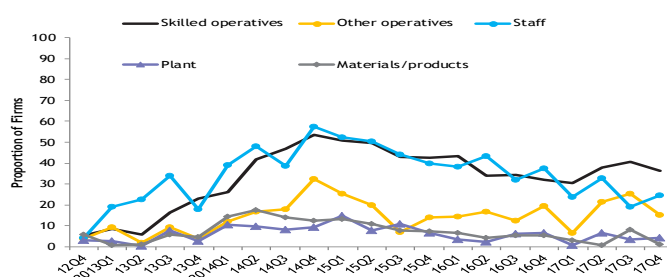
Compared to 12 months ago, tender prices were higher, on balance, for 36% of firms for new construction work and improvement, and 27% for repair and maintenance work. The former is the lowest balance since 2013 Q4. In England, 55% of firms, on balance, reported higher tender prices for new construction work and improvement, and 37% for repair and maintenance. In Wales, on balance, 45% of firms reported an increase in tender prices for both new construction work and improvement and repair and maintenance. Scottish firms reported the weakest balances in Q4. On balance, only 4% of respondents reported an increase in tender prices for new construction work and improvement, the lowest balance in five years. For repair and maintenance, a negative balance (-12%) was reported for the first time since 2012 Q4.

Costs Compared with 12 Months Ago (GB)



In Q4, 81% of firms in Great Britain reported that costs increased by up to 5% compared to 12 months earlier, 5% reported increases of over 5%, whilst only 3% reported decreases. Overall, a balance of 82% of firms reported an increase in costs, unchanged from Q3. In England, 88% of firms, on balance, reported an increase in costs, up from 71% Q3. 3% reported rises of over 5%, 87% by up to 5%, whilst only 1% of firms reported decreases. In Scotland, 71% of firms, on balance, reported an increase in costs over the last 12 months, the lowest balance since 2013 Q4. 67% of firms reported increases of up to 5%, 8% by over 5% and 21% reported no change. In Wales, 85% of firms, on balance, reported an increase in costs over the last 12 months, with 90% of firms reporting increases by up to 5%.

Contractors Unsatisfied with Supply (GB)



Overall, civil engineering firms reported continued difficulties with the supply of suitable workers in Q4. In Great Britain, 36% and 24% of respondents reported dissatisfaction supply of skilled operatives and staff, respectively. The percentage reporting dissatisfaction in supply of other operatives was 15% in Q4 compared to 25% in Q3. For supply of plant, on balance, 4% of firms reported dissatisfaction and only 1% reported dissatisfaction with the supply of materials/products. The most commonly reported dissatisfaction was supply of skilled operatives in England (37%) and Scotland (42%). For the time since 2011 Q4, Welsh firms did not report any concerns over available resources or supply of labour.

Workload Trends Survey

1 Workload	Q4	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
<i>By Country</i>																	
GB	+31	+39	+48	+60	+52	+29	+29	+7	+5	+20	+2	+1	+11	+8	+13	+24	-4
England	+18	+42	+59	+68	+57	+50	+37	-14	+3	+18	+1	+14	+13	+21	+32	+22	+21
Scotland	+29	+50	+11	+21	+27	+18	+28	+59	+12	+24	+32	-4	+16	-20	-24	+23	-21
Wales	-5	0	+79	+71	+12	+46	-32	-32	+30	+13	-9	-27	+6	-40	+67	+56	-33
<i>By Size of Firm</i>																	
<115	+47	+13	+21	+29	+37	+39	+19	+6	0	-16	-6	+2	+3	+19	0	+17	-20
115-299	+18	+75	+38	+17	+45	+42	+46	+4	-12	-4	0	+30	+16	+45	+32	+29	+4
300-599	+38	+33	+67	+100	+83	+80	0	+50	+11	+30	0	-9	+25	+25	+13	+75	+57
600+	+27	+39	+55	+77	+52	+8	+35	-8	+16	+48	+7	-13	+5	-18	0	0	-100
<i>By Type of Work</i>																	
Motorways & trunk roads	+13	+21	+26	+52	+23	+38	+29	-12	-7	-29	-11	-21	-4	-14	-15	+5	-10
Local roads	-6	-9	+9	+35	+2	+15	+10	-24	-31	-16	-11	-27	-13	-22	-16	-19	-24
Railways	+51	+45	+43	+48	-4	+28	-12	-18	-5	+15	+13	-2	-30	-1	-8	-38	-32
Airports	-2	-16	+13	-45	+6	-13	-39	+12	-20	-10	-9	+3	-18	+5	+17	+8	0
Harbours, waterways etc.	+13	+3	+21	+16	-8	+10	+1	-5	-5	-10	-26	-32	-23	-12	-5	-1	-28
Water & sewerage	+20	+2	+5	+11	+8	-1	-8	-22	-9	+16	-19	-7	+1	-16	-10	-6	+1
Electricity	+6	+20	+17	+20	+57	+26	+21	+6	+22	+16	+28	-7	+8	-16	-16	+24	-8
Gas	+2	-26	+21	+9	-22	-40	-37	+6	-32	-55	-75	+21	+14	+29	+57	+57	+6
Communications	+22	0	+14	+20	-15	0	0	+3	+23	0	+42	+14	+13	-54	-21	+33	+28
Preliminary works, etc.	+40	+48	+36	+45	+45	+34	+59	+22	+41	+33	+19	+9	+26	+37	+11	+12	+10

Weighted % Balance of Respondents

2 Expected Workload	Q4	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4
In the Next 12 Months																	
<i>By Country</i>																	
GB	+58	+58	+58	+72	+49	+57	+55	+29	+51	+32	+10	+23	+35	+5	+5	+23	+28
England	+61	+63	+73	+73	+65	+65	+70	+17	+73	+45	+26	+50	+60	+31	+16	+20	+50
Scotland	+47	+50	+52	+54	+48	+45	+53	+46	+30	+39	+19	-20	-2	-51	-49	+6	-4
Wales	+10	+22	-4	+86	+70	+82	+42	+20	+8	+12	-52	+18	-11	-68	+42	+25	+35
<i>By Size of Firm</i>																	
<115	+56	+33	+43	+56	+40	+34	+37	+14	+39	+22	+8	+9	+16	+9	+10	+11	+6
115-299	+55	+44	+69	+41	+64	+43	+48	+32	+31	+29	+16	+32	+48	+48	+20	+38	+23
300-599	+38	+63	+100	+100	+63	+67	+63	+45	+64	+42	-50	+8	0	+11	+22	+67	+67
600+	+66	+68	+52	+84	+41	+68	+65	+28	+62	+34	+20	+33	+51	-14	-50	0	+33

Weighted % Balance of Respondents

3 Order Books	Q4	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
<i>By Country</i>																	
GB	+3	+40	+38	+45	+42	+59	+30	+13	+21	+13	+9	+3	+19	-9	+3	+13	-10
England	-7	+42	+38	+55	+51	+64	+28	-11	+24	+8	+14	+9	+34	+17	+7	+7	+13
Scotland	-5	+47	+23	+2	+30	+41	+11	+64	+13	+31	+50	+23	+23	-37	-3	+15	-43
Wales	-10	0	+67	+67	+44	+50	+17	+29	+56	+20	-9	+27	-79	-63	+50	+14	-6
<i>By Size of Firm</i>																	
<115	+35	0	+21	+19	+14	+35	+29	+13	+10	-24	-9	-14	+6	+6	+2	+9	-23
115-299	+18	+50	+23	+29	+45	+61	+43	+8	-9	+5	+13	+5	+22	+38	+27	+29	-10
300-599	+14	+40	+67	+100	+40	+75	-17	+36	+38	+43	0	+8	0	+40	+43	+67	+29
600+	-13	+50	+44	+52	+52	+63	+45	+4	+34	+23	+16	+9	+34	-43	-75	-33	-33
<i>By Type of Work</i>																	
Motorways & trunk roads	-8	+26	+31	+43	+38	+49	+24	-24	+1	-23	-24	-23	+7	-14	-5	0	+2
Local roads	-8	-8	+21	+8	+13	+21	+9	-23	-24	-16	-17	-41	-25	-31	-11	-19	-29
Railways	+30	+32	+49	+51	+35	+25	-4	-3	-1	+24	+3	-15	-7	-17	-37	-17	-30
Airports	-10	-1	+27	-54	-1	-4	-20	0	-23	+7	+8	-16	-2	-14	-6	+12	-14
Harbours, waterways etc.	+20	+6	+15	+5	+5	+21	-3	-10	-11	+1	-13	-28	-24	-15	+5	+4	-9
Water & sewerage	+1	-1	+9	+17	+15	+18	-25	-25	+7	+7	-2	-11	+4	-10	-25	-10	+1
Electricity	-3	+12	+54	+31	+20	+23	0	+29	+40	+36	+26	+3	-2	+4	-27	+31	-14
Gas	+18	-18	+14	-41	-32	-40	-52	+6	-32	-29	-75	+23	+19	+36	+18	+53	-13
Communications	+21	-3	+36	+26	-24	+6	-3	0	+11	-6	+24	+4	+9	-71	+33	+33	+4
Preliminary works, etc.	+35	+22	+45	+31	+28	+41	+62	+24	+37	+31	-1	+14	+17	+23	+26	+4	+4

Weighted % Balance of Respondents

4 Expected Trends in New Orders	Q4	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4
In the Next 12 Months																	
<i>New Work</i>																	
<i>By Country</i>																	
GB	+46	+58	+40	+69	+50	+51	+51	+27	+42	+29	+16	+22	+32	+6	-2	+20	+14
England	+44	+63	+48	+72	+55	+66	+75	+4	+59	+45	+42	+48	+57	+40	+3	+20	+36
Scotland	+41	+38	+30	+48	+51	+26	+31	+47	+27	+26	+8	-12	-12	-52	-42	+6	-23
Wales	+10	+22	0	+86	+70	+71	+25	+20	+13	+12	-57	+14	-11	-68	+42	0	+25
<i>By Size of Firm</i>																	
<115	+48	+33	+37	+43	+28	+30	+33	+21	+33	+18	0	-4	+21	+2	+5	+7	+2
115-299	+45	+50	+56	+41	+68	+40	+52	+41	+19	+19	+10	+18	+34	+48	+16	+42	+12
300-599	+50	+43	+100	+100	+75	+67	+38	+55	+64	+42	-67	+31	0	0	+22	+33	+44
600+	+44	+71	+26	+82	+41	+60	+65	+12	+50	+34	+42	+33	+51	-6	-75	0	0
<i>R&M</i>																	
<i>By Country</i>																	
GB	+39	+39	+11	+39	+26	+30	+41	+10	+13	-4	-6	+9	+18	-13	-8	+15	+12
England	+49	+51	+25	+37	+37	+44	+53	-10	+26	-3	+11	+41	+40	+8	-10	+18	+30
Scotland	+4	+31	+2	+38	+10	+8	+41	+36	+19	+23	-16	-14	-14	-43	-18	+7	0
Wales	-18	-11	-33	+54	+15	+15	+21	+4	-29	-31	-35	-5	-17	-68	+8	0	-10
<i>By Size of Firm</i>																	
<115	+37	+10	+20	+37	+10	+23	+14	-7	+17	+2	-16	0	0	+5	-2	-2	-8
115-299	+45	+18	+40	+44	+33	+23	+28	+25	-4	+23	+7	+4	+15	+19	+5	+24	+13
300-599	+33	+38	+43	+67	0	+40	+43	+30	+55	0	-17	+8	0	0	+22	+33	+25
600+	+38	+53	-3	+33	+38	+33	+66	+3	0	-21	-6	+18	+37	-35	-75	+25	+50

Weighted % Balance of Respondents

Workload Trends Survey

5 Employment	Q4	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
<i>By Country</i>																	
Skilled operatives																	
GB	+50	+40	+43	+60	+59	+60	+38	+16	+32	+30	+27	+18	+28	+2	+21	+41	+14
England	+42	+43	+55	+76	+58	+60	+44	+1	+17	+20	+19	+25	+30	+24	+43	+39	+29
Scotland	+42	+58	+26	+24	+43	+56	+56	+35	+46	+54	+53	+31	+38	-15	-11	+31	-4
Wales	+22	0	+4	+52	+40	+81	-12	-44	+58	+31	+35	+14	0	-61	+42	+63	+35
Other operatives																	
GB	+47	+32	+33	+59	+59	+59	+41	+18	+28	+24	+23	+13	+25	-1	+20	+29	+9
England	+29	+35	+39	+70	+59	+63	+46	+2	+8	+12	+19	+19	+27	+22	+37	+31	+28
Scotland	+63	+39	+17	+24	+37	+55	+63	+40	+50	+46	+43	+18	+29	-25	-10	+28	-8
Wales	+4	0	+4	+66	+50	+86	-4	-24	+54	+42	+26	+36	+14	-50	+33	+44	-5
Staff																	
GB	+35	+37	+29	+59	+57	+60	+31	+31	+32	+27	+36	+18	+28	+9	+24	+38	+22
England	+37	+42	+40	+78	+52	+62	+42	+27	+12	+20	+30	+21	+30	+42	+43	+40	+35
Scotland	+17	+56	+10	+8	+42	+63	+38	+40	+54	+40	+59	+31	+27	-22	0	+31	+2
Wales	+26	+22	-15	+66	+60	+76	+24	-20	+54	+32	+30	+41	+39	-25	+75	+69	+40
<i>By Size of Firm</i>																	
Skilled operatives																	
<115	+44	+25	+18	+30	+18	+29	+12	0	+2	-11	+7	0	+13	+14	+4	+15	-7
115-299	+41	+44	+56	+33	+61	+55	+47	+7	+11	+34	+29	+59	+42	+35	+30	+54	0
300-599	+13	+56	+75	+43	+56	+86	+38	+27	+45	+67	+17	+38	+20	+33	+44	+75	+78
600+	+65	+40	+40	+81	+78	+68	+48	+22	+54	+31	+35	-13	+28	-22	0	+50	0
Other operatives																	
<115	+36	+19	+36	+30	+25	+35	+22	+2	0	-9	+7	-2	+5	+2	+7	+9	-11
115-299	+20	+56	+56	+33	+54	+54	+50	+10	+15	+14	+23	+38	+33	+30	+23	+27	-4
300-599	+25	+38	+75	+57	+56	+86	+38	+36	+45	+58	-25	+31	+25	+33	+50	+75	+67
600+	+65	+30	+18	+76	+78	+63	+48	+22	+43	+31	+35	-5	+28	-24	0	+50	0
Staff																	
<115	+28	+21	+14	+32	+32	+27	+12	+24	+14	0	+15	-2	+3	+6	+18	+20	+7
115-299	+41	+39	+56	+33	+50	+55	+40	+10	+22	+24	+29	+50	+42	+39	+28	+41	+11
300-599	+13	+44	+63	+71	+44	+71	+38	+36	+45	+55	+17	+38	+30	+56	+44	+75	+78
600+	+43	+40	+21	+74	+78	+70	+35	+43	+41	+31	+51	-5	+28	-15	0	+50	0
Weighted % Balance of Respondents																	
6 Expected Employment																	
In the Next 12 Months																	
<i>By Country</i>																	
Operative jobs																	
GB	+48	+48	+51	+68	+55	+55	+60	+35	+44	+42	+24	+24	+27	+12	+13	+28	+29
England	+53	+49	+58	+65	+54	+59	+71	+25	+66	+52	+40	+54	+48	+26	+15	+28	+45
Scotland	+31	+45	+49	+63	+44	+51	+38	+51	+30	+51	+30	-15	-2	-29	-33	+3	+8
Wales	+5	+28	-4	+84	+75	+76	+58	+20	+8	+15	-43	+14	-11	-25	+42	+25	+35
Employment of staff																	
GB	+47	+49	+54	+71	+66	+56	+55	+40	+39	+39	+30	+19	+40	+15	+14	+28	+21
England	+37	+62	+63	+70	+68	+65	+69	+31	+53	+52	+47	+51	+62	+28	+19	+27	+44
Scotland	+48	+34	+51	+66	+56	+48	+19	+49	+34	+44	+24	-12	+2	-27	-22	+13	-13
Wales	+5	+17	-4	+84	+75	+71	+54	+4	-4	+19	-39	+18	+33	-11	+42	+25	+30
<i>By Size of Firm</i>																	
Operative jobs																	
<115	+46	+29	+41	+34	+36	+25	+33	+12	+31	+16	+18	+13	+10	+14	+17	+11	+6
115-299	+55	+50	+63	+56	+64	+40	+52	+34	+19	+36	+26	+29	+34	+43	+16	+38	+27
300-599	+38	+63	+86	+100	+50	+67	+63	+55	+73	+50	-50	+15	+11	0	+33	+67	+67
600+	+50	+50	+45	+76	+59	+68	+79	+37	+50	+53	+42	+33	+37	+3	-25	+25	+33
Employment of staff																	
<115	+41	+25	+27	+29	+40	+19	+26	+14	+21	+14	+13	+13	+13	+16	+3	+7	+2
115-299	+59	+33	+56	+63	+71	+40	+48	+41	+20	+39	+19	+25	+28	+52	+33	+42	+27
300-599	+38	+63	+100	+100	+75	+67	+50	+45	+45	+50	-50	+15	+33	+11	+33	+67	+33
600+	+47	+57	+52	+81	+70	+72	+79	+47	+54	+44	+59	+21	+65	+3	-25	+25	+33
Weighted % Balance of Respondents																	
7 Costs*																	
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	0	0	0	0	0	0	0	+0	0	0	0	0	0	0	+1
Unchanged	+3	0	0	+5	+1	+1	+1	+1	+2	+5	+7	+12	+1	+1	+1	0	+2
Slower	+25	+10	+15	+19	+8	+10	+9	+9	+13	+15	+19	+18	+9	+15	+15	+18	+11
Same rate	+62	+75	+77	+61	+68	+67	+75	+78	+71	+71	+54	+59	+74	+70	+71	+69	+81
Faster	+9	+15	+9	+15	+23	+21	+16	+12	+14	+8	+19	+11	+16	+14	+14	+13	+5
Cost Balances																	
<i>By Country</i>																	
GB																	
England	+65	+90	+88	+78	+95	+90	+92	+90	+90	+81	+82	+60	+90	+90	+75	+71	+88
Scotland	+42	+86	+77	+74	+78	+85	+81	+100	+82	+98	+85	+79	+93	+94	+91	+97	+71
Wales	+96	+83	+96	+80	+90	+81	+88	+64	+96	+50	+4	+18	+67	+57	+100	+100	+85
<i>By Size of Firm</i>																	
<115																	
115-299	+70	+83	+94	+81	+82	+73	+87	+77	+81	+68	+67	+69	+79	+74	+78	+79	+82
300-599	+75	+63	+75	+83	+89	+86	+100	+91	+82	+92	+50	+69	+90	+89	+100	+100	+100
600+	+60	+100	+86	+62	+100	+100	+100	+100	+88	+72	+68	+41	+100	+87	+75	+75	+75

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

Workload Trends Survey

8 Tender Prices	Q4	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+36	+52	+51	+69	+79	+65	+71	+55	+47	+46	+39	+45	+47	+50	+53	+49	+36
England	+23	+56	+40	+69	+86	+69	+72	+38	+61	+56	+53	+45	+53	+55	+52	+51	+55
Scotland	+40	+13	+39	+42	+59	+38	+56	+58	+23	+54	+39	+63	+45	+51	+51	+38	+4
Wales	+5	+53	+73	+86	+80	+59	+63	+48	+42	+27	+4	+18	-11	+32	+92	+63	+45
By Size of Firm																	
<115	+29	+24	+45	+35	+53	+26	+40	+33	+35	+20	+33	+28	+16	+36	+29	+38	+22
115-299	+36	+56	+69	+56	+79	+53	+59	+37	+27	+31	+23	+48	+48	+39	+58	+48	+27
300-599	+13	+29	+57	+100	+63	+100	+63	+73	+55	+67	+33	+69	+60	+44	+78	+100	+89
600+	+46	+64	+47	+79	+94	+75	+100	+66	+62	+56	+51	+36	+54	+61	+50	+50	0
R&M																	
By Country																	
GB	+31	+41	+39	+58	+59	+57	+65	+49	+40	+27	+25	+46	+41	+37	+46	+42	+27
England	+20	+46	+29	+50	+81	+55	+68	+37	+63	+39	+29	+62	+46	+33	+41	+43	+37
Scotland	+23	+28	+36	+34	+38	+52	+59	+59	+23	+44	+33	+60	+42	+46	+38	+21	-12
Wales	+10	+53	+62	+81	+50	+8	+54	+48	+17	-15	+13	0	-11	+46	+83	+63	+45
By Size of Firm																	
<115	+24	+17	+27	+26	+45	+24	+27	+29	+39	+17	+26	+30	+19	+14	+20	+31	+19
115-299	+41	+60	+60	+38	+54	+48	+52	+27	+32	+24	+21	+33	+30	+38	+52	+42	+35
300-599	+13	+43	+50	+83	+57	+80	+86	+70	+45	+11	+33	+54	+60	+44	+67	+67	+75
600+	+35	+44	+36	+71	+67	+68	+90	+59	+43	+38	+25	+58	+50	+43	+50	+50	-25

Weighted % Balance of Respondents

9 Supply of Resources Required	Q4	2014Q1	Q2	Q3	Q4	2015Q1	Q2	Q3	Q4	2016Q1	Q2	Q3	Q4	2017Q1	Q2	Q3	Q4
Skilled Operatives																	
GB	23	26	42	47	54	51	50	43	43	43	34	34	32	30	38	41	36
England	16	23	47	47	54	54	37	41	49	44	38	39	25	39	36	31	37
Scotland	43	35	33	46	62	66	63	33	45	51	49	32	55	40	24	38	42
Wales	19	33	11	32	25	29	33	0	21	27	17	45	0	7	67	69	0
Other Operatives																	
GB	4	12	17	18	32	25	20	7	14	14	17	12	19	7	21	25	15
England	6	18	27	11	30	27	17	4	14	11	16	12	14	12	15	16	11
Scotland	5	10	16	21	32	8	13	9	4	20	23	15	37	3	16	31	23
Wales	0	0	0	30	0	29	33	0	13	0	17	5	0	0	33	25	0
Staff																	
GB	18	39	48	38	58	52	50	44	40	38	43	32	37	24	33	19	24
England	11	39	53	26	51	53	43	35	44	44	54	30	35	31	30	18	32
Scotland	26	40	40	33	61	58	66	62	41	37	43	38	36	21	22	25	19
Wales	19	33	41	64	35	24	58	16	17	8	17	0	22	0	33	0	0
Plant																	
GB	3	10	10	8	9	15	8	11	7	3	2	6	6	1	6	3	4
England	1	9	12	6	15	12	7	6	1	3	2	4	3	1	5	5	8
Scotland	3	3	12	4	5	23	9	7	9	2	5	5	8	2	0	0	0
Wales	19	0	0	0	10	24	25	0	8	8	0	23	22	0	0	0	0
Materials and Products																	
GB	5	14	17	14	13	13	11	8	7	7	4	5	6	3	1	8	1
England	5	16	17	22	23	18	6	3	5	3	1	9	5	5	2	10	3
Scotland	3	3	14	2	5	6	6	21	2	9	15	2	8	3	0	9	0
Wales	0	0	0	0	5	0	33	0	0	0	0	0	0	0	0	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 2017 Q4 survey totalled 105. 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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