Workload Trends 2023 Q1

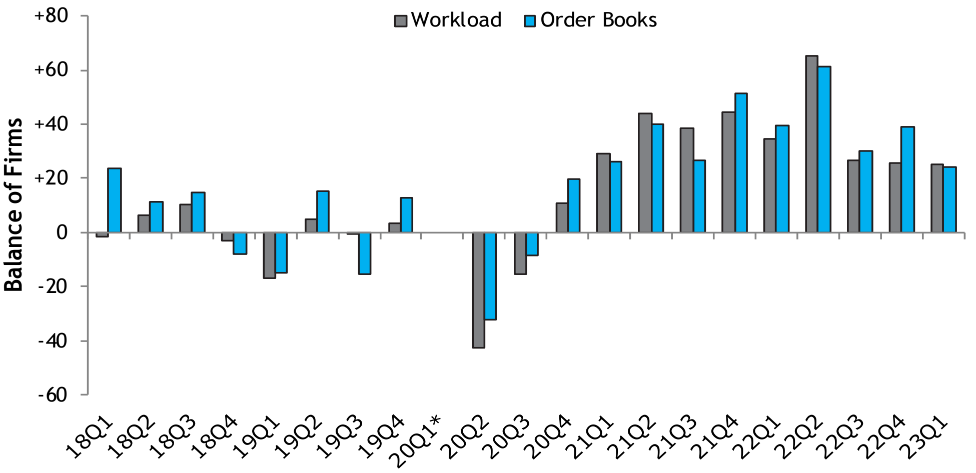
Workloads and order books increased in Q1

Weighted Balances (%)

Change on 12 Months Ago	
Workload	
2022 Q1	+35
2023 Q1	+25
Tender Prices	
New Work	
2022 Q1	+85
2023 Q1	+90
R&M Work	
2022 Q1	+83
2023 Q1	+87
Order Books	
2022 Q1	+40
2023 Q1	+24
Over the Next 12 Months	
Expected Workload	
2022 Q1	+41
2023 Q1	+30
Expected Orders	
New Work	
2022 Q1	+34
2023 Q1	+31
R&M Work	
2022 Q1	+18
2023 Q1	+24

- On balance, 25% of British firms reported an increase in workloads in Q1, marking a tenth quarter of growth.
- Workloads increased in 6 out of 12 sectors, including renewable electricity and water & sewerage
- However, workloads fell in motorways/trunk roads, local roads and preliminary works
- Order books rose for 24% of firms, on balance, and 30% expected higher workloads in the year ahead.
- Cost pressures remained elevated, with 81% of firms reporting increases of over 5%
- The supply of skilled operatives remained the key supply issues across Great Britain

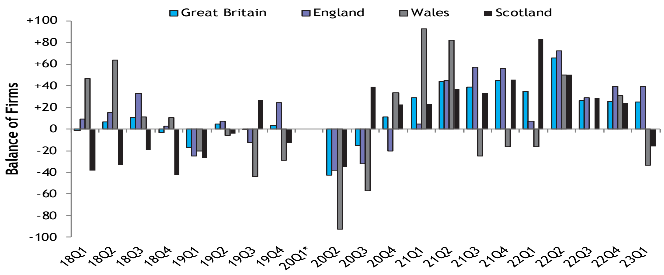
Change in Workloads and Order Books - Great Britain



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

Trends in Workload

Workloads Compared to 12 Months Ago



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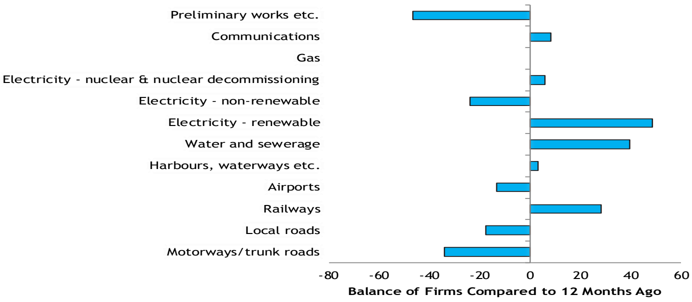
Overall, civil engineering contractors across Great Britain experienced annual workloads growth for a tenth consecutive quarter in Q1. On balance, 25% of firms reported an annual rise in workloads, largely unchanged from a balance of 26% in Q4. Overall, 39% of the respondents reported that workloads had increased and 14% reported that they had fallen. The picture was more mixed at a national level, however. In England, 40% of firms reported an annual rise in workloads, unchanged from Q4. In Scotland, 16% of firms in reported that workloads fell compared to a year ago, in contrast to 24% that reported a rise in Q4. In Wales, one-third of firms reported a decrease in workloads from a year ago, down from 31% that reported an increase in Q4.

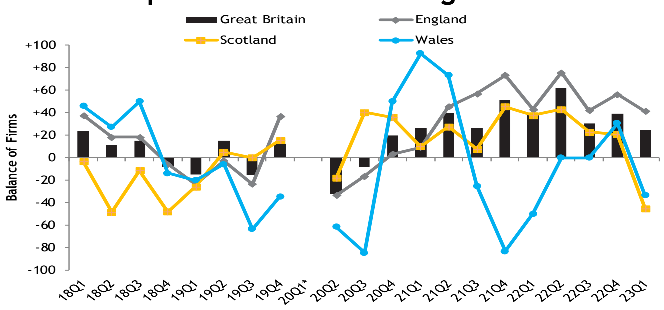
Workload — By Type of Work (GB)



Growth in workloads was experienced in half of the 12 sectors in Q1. This includes renewable electricity (48%), water and sewerage (40%) and railways (28%). Communications, nuclear & nuclear decommissioning, and harbours & waterways also recorded positive balances in Q1. In the remaining sectors, the largest negative balance was recorded for preliminary works, in which 47% of respondents reported a fall in workloads. Workloads also fell in motorways/trunk roads (according to a balance of 34%), non-renewable electricity (24%), local roads (17%), and airports (13%). Workloads in motorways/trunk roads have now fallen for three consecutive quarters.

Trends in Orders and Future Expectations

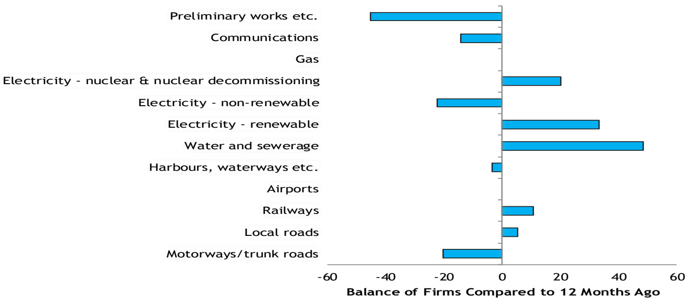
Orders Compared to 12 Months Ago



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

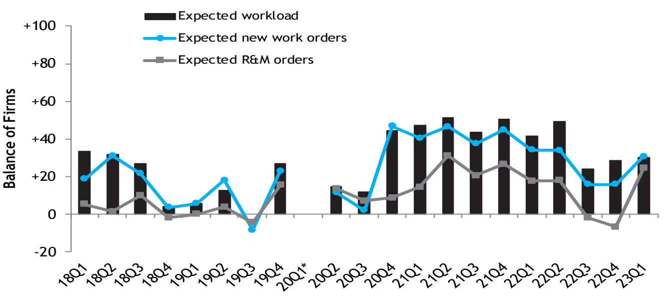
Order books for civil engineering firms continued to grow in annual terms across Great Britain in Q1, matching the run of ten quarters of growth in workloads. On balance 24% of British firms reported an increase, compared to 39% in Q4. Overall, 53% of firms reported that orders had risen and 28% reported that they had fallen. In England, 41% of firms reported an annual increase in orders in Q1, down from 56% in Q4. In Scotland, 13% of firms reported that orders had increased in Q1 compared to a year earlier, and 58% reported that they had fallen, leaving a negative balance of 45%. In Wales, one-third of respondents reported an annual decrease in new orders, on balance, reversing the balance of 31% that reported an increase in Q4.

Order Books — By Type of Work (GB)



Only five out of 12 sectors experienced an annual increase in order books, on balance, in Q1. A balance of 48% of firms cited an annual increase in orders for water & sewerage, whilst 33% and 20% reported that order books rose in renewable electricity and nuclear & nuclear decommissioning, respectively. Order books in railways and local roads also rose in annual terms in Q1. However, a fall in order books was reported, on balance, in five sectors: preliminary works (45% on balance), non-renewable electricity (22%), motorways/trunk roads (20%), communications (14%), and harbours & waterways (4%). A zero balance was recorded for gas and airports with equal proportions of respondents reporting either an increase or decrease in order books.

Expected Future Trends in the Next 12 Months

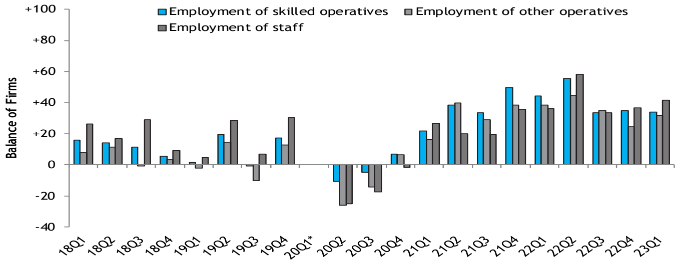


*The survey was not run in 2020 Q1 due to COVID-19

On balance, 30% of British firms reported that workloads are expected to increase in the next 12 months, similar to 29% in Q4. In England, 34% of firms expected workloads to increase over the next 12 months. This figure was 16% in Scotland, whilst in Wales, 60% expected a decline in workloads, on balance. For new work orders, 31% of British firms anticipated an increase over the coming year, on balance. By nation firms in England (32%), Scotland (23%) and Wales (20%) expected new work orders to increase over the next 12 months. For R&M orders, 24% of British firms expected a rise over the next 12 months. In England, Wales and Scotland increases were expected by 14%, 40% and 39%, respectively, on balance.

Trends in Employment

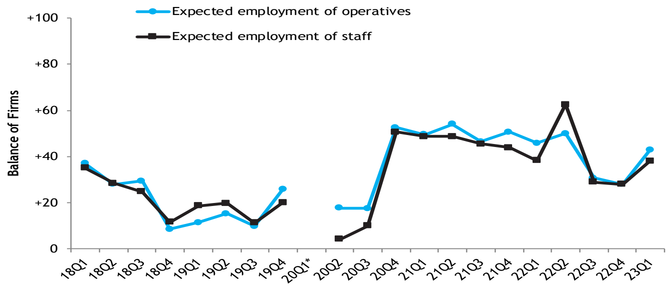
Employment Compared to 12 months Ago (GB)



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

Firms in Great Britain continued to expand their workforce in Q1. 34% and 31% of firms reported an increase in employment of skilled operatives and other operatives respectively, compared to balances of 35% and 24% in Q4. For staff, a balance of 42% of firms reported an increase in employment in Q1, up from 36% in Q4. In England, employment balances were 37% for skilled operatives, 32% for other operatives and 42% for staff. In Scotland, a balance of 23% was reported for skilled operatives, 19% for other operatives and 19% for staff. In Wales, employment increased, on balance, according to 20% of firms for other operatives and 20% for staff, but equal proportions reported either an increase of decrease in the employment of skilled operatives, resulting in a zero balance.

Expected Employment in the Next 12 Months



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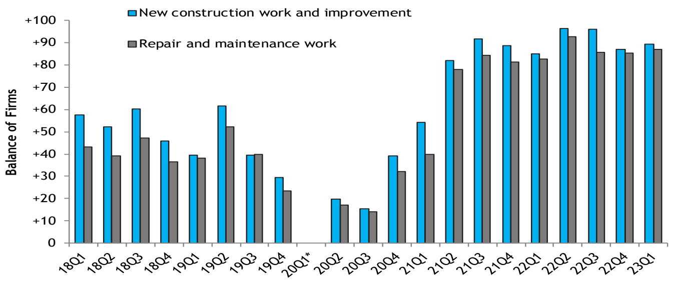
The 12-month employment outlook for Great Britain remained positive in the first quarter of 2023, with a balance of 43% of firms expecting an increase in operatives and 38% expecting an increase in staff employment. In England, 45% and 43% of firms expected the employment of operatives and staff to increase, respectively. In Wales, on balance, 60% of firms expected employment to increase for both operatives and staff. In Scotland, 19% of firms, on balance, expected the employment of operatives to increase over the next 12 months and a balance of 13% was recorded for expectations in the employment of staff.

Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



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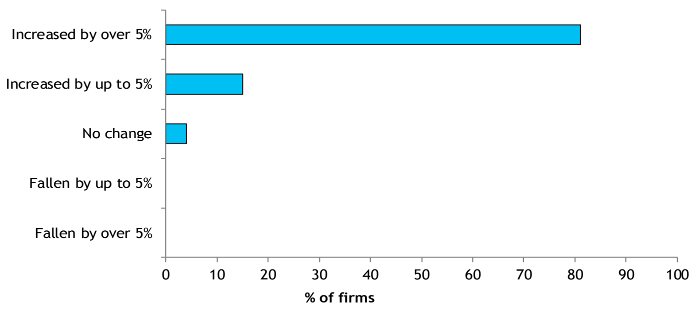
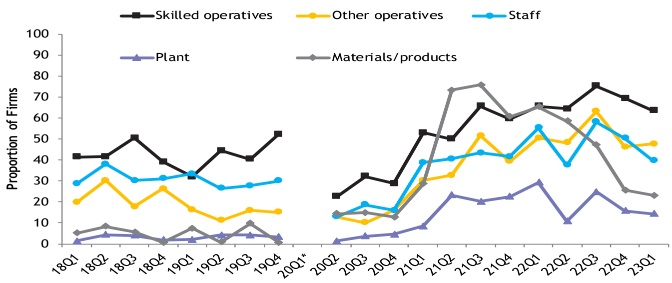
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 90% of firms for new construction work and improvement, and 87% for repair and maintenance work. Both balances increased slightly from Q4. In England, tender prices were higher, on balance, for 89% and 86% of firms for new construction work and improvement, and for repair and maintenance work, respectively. In Scotland, 87% firms reported higher tender prices for new construction work and improvement, and 87% for repair and maintenance work. In Wales 80% of firms reported an annual increase in tender prices for new construction work and improvement, and 80% for repair and maintenance.

Costs Compared with 12 Months Ago (GB)



An annual increase in costs was reported by 96% of firms in Great Britain, on balance, in Q1. Nevertheless, this is the lowest balance since the first quarter of 2021. 81% of respondents reported that costs increased by over 5% compared to a year earlier and 15% reported increases of up to 5%. This was replicated across England, Scotland and Wales, with an increase in costs reported by balances of 92% 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)



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

Overall, civil engineering firms in Great Britain reported that the supply of key resources in Q1 remained similar to Q4. 63% of firms cited issues with the supply of skilled operatives and 48% cited issues with the supply of other operatives. The proportion of firms citing issues with the supply of staff was 40%, whilst 23% and 14% 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 and Scotland, according to 74% and 52% of firms, respectively. Supply of skilled operatives and other operatives were the joint most commonly-cited issues for firms in Wales, cited by 60% of firms.

1 Workload

	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
Compared with 12 Months Ago																	
By Country																	
GB	-17	+5	-1	+3		-43	-15	+11	+29	+44	+39	+45	+35	+65	+27	+26	+25
England	-25	+7	-13	+25		-38	-32	-20	+5	+45	+58	+56	+7	+72	+29	+40	+40
Scotland	-26	-4	+27	-13		-35	+39	+23	+24	+38	+33	+45	+83	+50	+29	+24	-16
Wales	-20	-6	-44	-29		-92	-57	+33	+93	+82	-25	-17	-17	+50	0	+31	-33
By Size of Firm																	
<115	+8	0	+3	-6		-42	-27	-14	+27	+32	+16	+8	+18	+27	-5	-19	+10
115-299	-11	-8	-5	+16		-40	+22	+24	+13	+20	+42	+27	+31	+60	+31	+42	+39
300-599	-20	0	0	0		-36	-13	+38	+56	+46	+44	+67	+60	+75	+43	+8	0
600+	-67	+50	0	0		-100	-50	0	0	+100	+50	+100	+33	+100	+33	+75	+50
By Type of Work*																	
Motorways & trunk roads	+2	-1	+3	-6		+3	-6	-12	+27	+12	-2	+2	-6	+9	-10	-20	-34
Local roads	-27	-1	-2	-18		-16	-22	+7	+18	+25	+12	+5	+7	+17	+7	-28	-17
Railways	-20	+11	-8	+9		+8	+16	+17	-22	-2	-27	+5	+41	+47	-10	+41	+28
Airports	-37	+30	-24	-13		-81	-86	-46	-63	-62	-58	-8	-35	0	-15	+24	-13
Harbours, waterways etc.	-21	-19	-37	-35		-45	-21	+4	+3	+28	-4	+34	+30	+14	-6	+5	+3
Water & sewerage	-19	+36	-44	-11		-27	-28	-34	-2	-8	+35	+8	+10	+52	+2	+41	+40
Electricity - renewable										+46	+36	+52	+14	+20	+3	+9	+48
Electricity - non-renewable										-7	+23	+14	+23	0	-24	-38	-24
Electricity - nuclear & nuclear decommissioning										0	-50	-20	+14	na	+38	+40	+6
Gas	+6	-53	-31	-28		-36	-60	-29	-86	-54	-38	0	-50	na	-71	+10	0
Communications	+54	-22	+57	0		-33	-7	+38	-5	+58	+18	+6	-29	+43	+10	+5	+8
Preliminary works, etc.	-8	-25	-22	-20		-50	-39	+5	+13	+26	+27	+32	+43	+26	+4	-42	-47

Weighted % Balance of Respondents

2 Expected Workload

	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
In the Next 12 Months																	
By Country																	
GB	+6	+13	0	+27		+15	+12	+44	+47	+51	+43	+51	+41	+49	+24	+29	+30
England	+17	+18	+8	+39		+24	+28	+53	+31	+66	+71	+56	+40	+63	+22	+40	+34
Scotland	-21	-38	-6	+27		-26	-17	+14	+47	+6	+7	+41	+20	+7	+3	-4	+16
Wales	+5	+37	-15	-32		+67	+5	+67	+64	+71	+17	+30	+50	+75	+19	+46	-60
By Size of Firm																	
<115	+19	-12	+5	+20		-8	-12	+14	+39	+45	+21	+20	+26	+33	+5	+15	+34
115-299	0	0	+11	+46		+13	+26	+53	+44	+38	+62	+64	+69	+80	+13	+50	+53
300-599	0	+14	+20	+14		+9	+27	+50	+56	+46	+40	+43	+33	0	+40	+33	0
600+	0	+67	-50	0		+100	0	+57	+50	+100	+50	+100	+33	+100	+33	0	+25

Weighted % Balance of Respondents

3 Order Books

	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
Compared with 12 Months Ago																	
By Country																	
GB	-15	+15	-16	+13		-32	-8	+20	+26	+40	+27	+51	+40	+62	+30	+39	+24
England	-24	-3	-24	+37		-33	-16	+3	+9	+45	+57	+74	+43	+76	+42	+56	+41
Scotland	-26	+5	0	+16		-18	+40	+36	+10	+28	+8	+45	+38	+43	+23	+21	-45
Wales	-20	-6	-64	-35		-62	-85	+50	+93	+73	-25	-83	-50	0	0	+31	-33
By Size of Firm																	
<115	+6	-8	-13	+2		-28	-27	-10	+17	+26	+11	+8	+29	+14	-11	-12	+10
115-299	-18	0	-8	+25		-16	+28	+31	+7	+6	+31	+80	+54	+50	+27	+40	+35
300-599	0	-13	-33	+14		-40	-13	+17	+63	+46	+22	+40	+40	+75	+57	+55	0
600+	-67	+100	0	0		-100	-25	+33	0	+100	+50	+100	+33	+100	+33	+67	+50
By Type of Work*																	
Motorways & trunk roads	+4	+4	-14	0		+9	-9	-16	+20	+28	+7	+9	-14	+45	-3	-30	-20
Local roads	-19	+8	-18	-22		-14	-26	+7	+18	+15	-12	-14	+20	+23	+4	-5	+5
Railways	-10	+5	-29	+14		-12	+9	-3	-44	0	-13	+38	+27	+44	-2	+39	+11
Airports	-59	+33	0	-15		-85	-65	-36	-50	-50	-50	-8	-18	0	+5	+29	0
Harbours, waterways etc.	-32	-26	-48	-25		-37	-27	-19	-4	+28	-14	+32	+50	+29	+5	+6	-4
Water & sewerage	-22	+23	-44	-5		-12	-14	+5	+9	+6	+32	+23	+12	+47	+17	+41	+48
Electricity - renewable										+59	+7	+20	+19	+9	+4	-12	+33
Electricity - non-renewable										+3	+30	-4	-25	-39	-37	-28	-22
Electricity - nuclear & nuclear decommissioning										+43	-33	-17	+14	0	+55	0	+20
Gas	-7	-53	-20	-32		-36	-56	0	-33	0	-38	0	-57	0	+20	+17	0
Communications	+7	-30	+50	+24		-28	-7	+36	+29	+75	+29	0	-29	+38	+7	-15	-14
Preliminary works, etc.	-18	-15	-24	-24		-47	-38	+7	+9	+35	+31	+23	+38	+27	-4	-32	-45

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
In the Next 12 Months																	
New Work																	
By Country																	
GB	+6	+18	-8	+23		+11	+2	+47	+40	+47	+37	+45	+34	+34	+16	+16	+31
England	+21	+21	+3	+33		+25	+30	+51	+31	+59	+74	+56	+45	+51	+8	+25	+32
Scotland	-18	-46	-25	+30		-39	-36	+26	+42	-6	-11	+9	+16	-20	0	-13	+23
Wales	-10	+37	-15	-32		+60	-29	+67	+64	+71	+17	+30	+10	+60	+19	+15	+20
By Size of Firm																	
<115	+14	-15	-5	+16		-16	-19	+5	+33	+36	+21	+32	+13	+19	-5	+8	+41
115-299	+5	0	0	+39		0	+18	+42	+28	+38	+54	+45	+54	+60	+6	+36	+50
300-599	0	+14	+10	+14		+18	-9	+63	+56	+38	+30	+29	+33	-25	+40	+25	0
600+	0	+100	-50	0		+100	+25	+71	+50	+100	+50	+100	+33	+100	0	-25	+25
R&M																	
By Country																	
GB	0	+4	-5	+15		+14	+7	+9	+14	+31	+20	+27	+18	+18	-2	-7	+24
England	+15	+9	-2	+26		+13	+21	+18	+11	+36	+40	+30	+3	+14	-6	-8	+14
Scotland	-3	-12	+3	+19		+5	+11	+21	+14	+10	-11	+5	+28	+7	+10	-22	+39
Wales	-53	+32	-35	-35		+79	-47	0	+10	+47	0	-17	+10	+60	0	-60	+40
By Size of Firm																	
<115	+20	-27	+8	+17		-12	-8	-6	+13	+34	+11	+25	0	+6	-3	-7	+19
115-299	-10	-8	-6	+22		0	+9	0	+24	+30	+25	+50	+33	+60	-7	+11	+33
300-599	-13	+29	0	+40		+18	-9	+25	+13	+15	+11	+17	+33	-25	0	-10	+43
600+	0	+33	-33	-50		+100	+50	+14	0	+67	+50	0	0	+50	0	-25	0

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

	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	+1	+20	-1	+17		-10	-5	+7	+22	+39	+33	+49	+44	+55	+33	+35	+34
England	-10	+36	+3	+27		-3	-20	-18	+2	+31	+62	+63	+33	+63	+53	+46	+37
Scotland	+10	-8	-3	-3		-22	+19	+41	+19	+48	+15	+68	+48	+33	+31	+19	+23
Wales	-23	+32	-20	+7		-60	+5	0	+86	+71	-17	0	+70	+60	-63	+15	0
Other operatives																	
GB	-2	+15	-10	+13		-26	-14	+6	+17	+40	+29	+38	+39	+45	+35	+24	+31
England	-18	+20	-8	+26		-14	-33	-16	0	+36	+64	+61	+14	+60	+55	+44	+32
Scotland	0	-12	-6	-12		-39	+9	+45	+9	+45	0	+47	+63	0	+34	+2	+19
Wales	-14	+37	-45	0		-79	+5	0	+86	+71	-17	-30	+80	+60	-44	-15	+20
Staff																	
GB	+5	+29	+7	+30		-25	-18	-2	+27	+20	+20	+36	+36	+58	+33	+36	+42
England	0	+25	0	+32		-20	-31	-28	+8	+8	+38	+51	+14	+68	+45	+47	+42
Scotland	0	-12	+19	+12		-43	+15	+33	+32	+10	0	+50	+59	+40	+10	+15	+19
Wales	-5	+37	+5	+34		-47	+5	0	+86	+71	-17	-40	+80	+40	-25	+33	+20
By Size of Firm																	
Skilled operatives																	
<115	+9	+12	+3	+11		-3	-5	-8	+24	+12	+21	+32	+13	+6	+8	0	+33
115-299	+27	+13	+5	+18		-4	-4	+33	+17	+19	+38	+27	+50	+40	+19	+23	+26
300-599	0	+25	-10	+13		-27	-9	0	+33	+46	+30	+57	+50	+75	+47	+42	+29
600+	-67	+33	0	+50		0	0	0	0	+100	+50	+100	+67	+100	+67	+75	+50
Other operatives																	
<115	+16	0	-5	+6		-18	-19	-5	+9	+18	+26	+29	+9	+19	+8	+7	+24
115-299	+19	-7	+5	+11		-22	-13	+29	+13	+19	+33	+20	+43	+40	+38	+27	+26
300-599	-10	+38	-20	+13		-45	-20	0	+33	+46	+20	+29	+67	+25	+40	+17	+29
600+	-67	+33	-25	+50		0	0	0	0	+100	+50	+100	+33	+100	+67	+50	+50
Staff																	
<115	+19	-6	+17	+30		-15	-10	-11	+18	+6	-5	+24	+13	+13	+5	+4	+24
115-299	+14	+7	0	+14		-22	-4	+29	+31	+19	+50	+50	+36	+40	+31	+32	+32
300-599	0	+38	+10	+50		-45	-18	-13	+22	+23	+20	+29	+33	+75	+53	+36	+43
600+	-33	+100	0	+50		0	-50	-14	+50	+33	0	+50	+67	+100	+33	+75	+75

Weighted % Balance of Respondents

6 Expected Employment

	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	+11	+15	+10	+26		+18	+18	+53	+50	+54	+46	+51	+46	+50	+31	+28	+43
England	+24	+5	+13	+38		+31	+28	+50	+33	+60	+79	+59	+45	+57	+39	+37	+45
Scotland	-10	-12	+3	+21		-39	+6	+55	+50	+23	+26	+50	+40	+27	+28	-2	+19
Wales	+10	+37	-15	-27		+67	+26	+67	+93	+76	-17	+50	+50	+60	-56	+38	+60
Employment of staff																	
GB	+19	+20	+11	+20		+4	+10	+51	+49	+49	+45	+44	+38	+63	+29	+28	+38
England	+26	+13	+14	+28		+13	+14	+51	+29	+59	+76	+56	+43	+80	+34	+44	+43
Scotland	0	-8	+3	+24		-43	+6	+36	+50	+13	+11	+36	+24	+20	+31	-9	+13
Wales	0	+37	-15	-18		+71	+16	+67	+93	+71	-17	+30	+10	+60	-31	+54	+60
By Size of Firm																	
Operative jobs																	
<115	+24	-9	+8	+20		-3	-2	+8	+42	+58	+26	+44	+26	+25	+13	+30	+38
115-299	+5	+7	+16	+44		+17	+30	+63	+50	+29	+69	+73	+54	+60	+13	+32	+63
300-599	+11	+14	+30	+14		+9	+18	+63	+56	+54	+40	+14	+67	+25	+40	+25	+14
600+	0	+67	-25	0		+100	+25	+71	+50	+100	+50	+100	+33	+100	+67	+25	+50
Employment of staff																	
<115	+15	-6	+8	+24		-22	-10	+3	+33	+39	+21	+20	+22	+19	+15	+30	+38
115-299	+29	+21	+21	+32		+9	+26	+42	+44	+33	+69	+73	+62	+100	+13	+41	+47
300-599	+22	+14	+30	0		-9	+18	+63	+67	+46	+40	+14	+33	+50	+33	+17	+14
600+	0	+67	-25	0		+100	0	+86	+50	+100	+50	+100	+33	+100	+67	+25	+50

Weighted % Balance of Respondents

7 Costs*

	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
Compared with 12 Months Ago (%)																	
GB																	
Falling	0	0	+1	0		0	+1	+1	0	+1	0	0	0	0	+1	+1	0
Unchanged	+1	0	0	+3		+4	+5	+1	0	0	0	0	0	0	0	0	0
Slower	+7	+13	+18	+11		+24	+23	+19	+19	+1	+1	+2	0	0	+1	0	+4
Same rate	+86	+81	+79	+82		+63	+63	+70	+63	+43	+47	+32	+16	0	+9	+8	+15
Faster	+5	+6	+2	+5		+9	+8	+9	+18	+55	+52	+66	+84	+100	+89	+91	+81
Cost Balances																	
By Country																	
GB	+91	+87	+80	+84		+68	+65	+76	+81	+97	+99	+98	+100	+100	+98	+99	+96
England	+87	+76	+65	+82		+59	+54	+75	+68	+96	+98	+97	+100	+100	+98	+96	+92
Scotland	+93	+92	+91	+91		+87	+72	+83	+81	+97	+100	+100	+100	+100	+97	+100	+100
Wales	+95	+100	+90	+79		+93	+75	+86	+100	+100	+100	+90	+100	+100	+100	+100	+100
By Size of Firm																	
<115	+84	+74	+74	+79		+69	+58	+61	+88	+88	+95	+92	+100	+100	+93	+93	+97
115-299	+95	+93	+80	+82		+52	+57	+86	+89	+100	+100	+100	+100	+100	+100	+100	+100
300-599	+90	+88	+90	+88		+73	+73	+88	+78	+100	+100	+100	+100	+100	+100	+100	+86
600+	+100	+100	+75	+100		+100	+75	+71	+50	+100	+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	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+39	+62	+39	+29		+20	+15	+39	+54	+82	+92	+89	+85	+96	+96	+87	+90
England	+31	+60	+56	+34		+18	+11	+24	+42	+84	+90	+95	+81	+94	+99	+89	+89
Scotland	+22	+27	+13	+19		+26	+20	+45	+64	+68	+93	+86	+80	+100	+90	+85	+87
Wales	+64	+95	+32	+11		+33	+28	+67	+93	+100	+83	+50	+100	+100	+100	+62	+80
By Size of Firm																	
<115	+26	+26	+25	+24		+24	+5	+24	+59	+70	+78	+76	+87	+88	+85	+81	+84
115-299	+33	+73	+42	+11		+17	+5	+47	+39	+79	+85	+100	+100	+100	+100	+86	+89
300-599	+67	+63	+60	+63		+9	+45	+63	+67	+85	+100	+86	+83	+100	+100	+83	+86
600+	+33	+100	+25	+50		+50	0	+29	+50	+100	+100	+100	+67	+100	+100	+100	+100
R&M																	
By Country																	
GB	+38	+52	+40	+23		+17	+14	+32	+40	+78	+85	+81	+83	+93	+86	+85	+87
England	+27	+28	+49	+31		+14	+12	+15	+36	+82	+88	+85	+75	+89	+89	+87	+86
Scotland	+30	+42	+25	+29		+39	+22	+55	+41	+65	+89	+85	+80	+100	+76	+89	+87
Wales	+55	+84	+21	0		+21	+5	0	+50	+88	+50	+17	+100	+100	+100	+89	+80
By Size of Firm																	
<115	+23	+16	+25	+21		+17	+10	+23	+57	+69	+63	+75	+87	+88	+88	+78	+81
115-299	+25	+46	+24	+12		+5	+5	+18	+31	+63	+83	+100	+92	+80	+100	+84	+83
300-599	+70	+63	+70	+67		+18	+36	+63	+50	+83	+90	+67	+83	+100	+71	+82	+86
600+	+33	+100	+33	0		+50	0	+29	0	+100	+100	+100	+67	+100	+100	+100	+100

Weighted % Balance of Respondents

9 Supply of Resources Required	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4	2022Q1	Q2	Q3	Q4	2023Q1
Skilled Operatives																	
GB	32	44	40	52		23	32	29	53	50	66	60	66	64	75	69	63
England	32	42	45	52		28	28	18	39	40	69	51	57	60	72	68	74
Scotland	45	46	53	63		22	47	55	64	65	74	68	76	67	79	68	52
Wales	9	0	10	36		13	35	67	64	94	58	50	80	80	81	77	60
Other Operatives																	
GB	16	11	16	15		13	10	16	30	33	52	39	51	48	63	46	48
England	8	16	22	18		17	12	14	16	34	55	41	43	49	66	49	58
Scotland	33	19	13	19		18	6	33	44	26	37	32	60	40	52	47	32
Wales	5	0	5	11		0	5	0	29	47	58	50	80	60	88	77	60
Staff																	
GB	33	26	28	30		13	19	16	39	41	43	42	55	38	58	50	40
England	31	22	36	19		18	22	7	31	41	55	44	62	46	65	56	57
Scotland	48	23	25	38		13	13	21	44	19	19	23	32	27	55	38	23
Wales	9	0	5	32		0	5	67	57	71	50	50	80	0	38	69	0
Plant																	
GB	2	4	4	3		1	4	4	8	23	20	22	29	11	25	16	14
England	2	2	9	0		2	3	4	6	27	17	10	29	6	33	16	22
Scotland	3	0	0	3		0	6	5	11	32	37	32	24	20	10	11	13
Wales	0	0	0	0		0	5	0	0	0	0	40	40	0	6	31	0
Materials and Products																	
GB	7	1	10	1		14	15	13	29	73	76	61	65	58	47	26	23
England	13	0	8	2		5	6	7	31	71	74	63	64	76	58	25	34
Scotland	3	4	0	0		13	19	19	31	74	81	59	64	20	38	19	0
Wales	5	0	0	0		13	5	0	7	76	50	40	40	33	25	0	20

% 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 2023 Q1 survey totalled 69. 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.

Enquiries to: Huston Gilmore, CECA, 1 Birdcage Walk, London SW1H 9JJ T: 020 7340 0454
E-mail: hustongilmore@ceca.co.uk, Website: www.ceca.co.uk