Workload Trends 2021 Q4

Activity rises as cost balance holds near record highs

Weighted Balances (%)

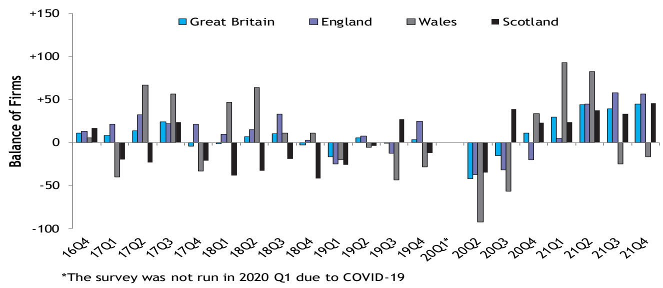
Change on 12 Months Ago	
Workload	
2020 Q4	+11
2021 Q4	+45
Tender Prices	
New Work	
2020 Q4	+39
2021 Q4	+89
R&M Work	
2020 Q4	+32
2021 Q4	+81
Order Books	
2020 Q4	+20
2021 Q4	+51
Over the Next 12 Months	
Expected Workload	
2020 Q4	+44
2021 Q4	+51
Expected Orders	
New Work	
2020 Q4	+47
2021 Q4	+45
R&M Work	
2020 Q4	+9
2021 Q4	+27

- In Q4, 45% of British firms reported an annual rise in workloads, the highest balance in nearly seven years.
- The civils firms' order books balance (51%) hit a seven-year high and 51% of firms expect increased workloads in 2022.
- The balance (98%) of firms reporting an annual increase in costs remained close to Q3's record high.
- A balance of 89% and 81% of firms cited higher tender prices for new work and R&M, respectively.
- The proportion of British firms noting issues with the supply of materials/products, skilled operatives, other operatives and staff fell from Q3.

Change in Workloads and Order Books - Great Britain

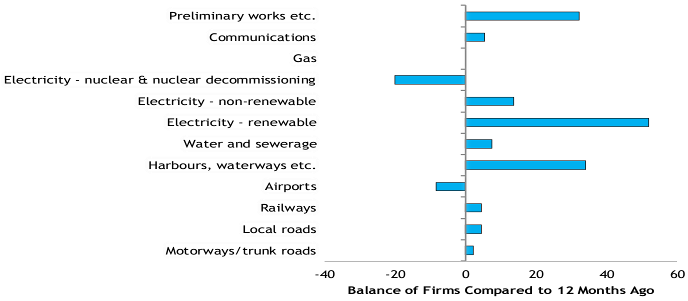
*The survey was not run in 2020 Q1 due to COVID-19

Workloads Compared to 12 Months Ago



Civil contractors across Great Britain saw annual workloads rise for a fifth straight quarter in 2021 Q4. On balance 45% of firms reported an annual increase in workloads, up from 39% in Q3 and the highest balance since 2014 Q4. Overall, 56% of the respondents reported that workloads had increased, and 32% reported that they were unchanged. The headline balance for Britain continued to mask the mixed picture at a national level. On balance, 56% of firms in England and 45% of firms in Scotland reported that workloads rose compared to a year ago. For Scotland, this marked the highest balance since 2015 Q3. In Wales, however, workloads fell in annual terms for a second consecutive quarter in Q4, according to a balance of 17% of firms.

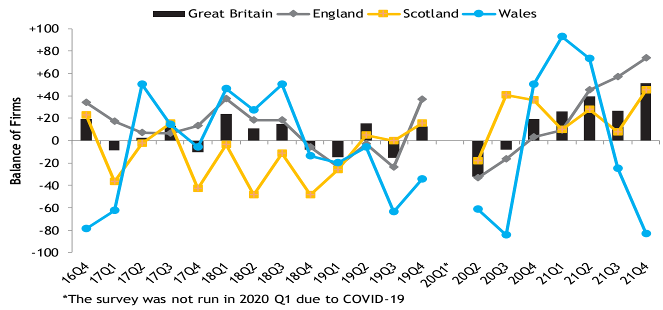
Workload — By Type of Work (GB)



Nine of the 12 sectors in Great Britain reported an annual rise in workloads, on balance, in Q4. The sector that reported the strongest balance in workloads was renewable (52%), followed by harbours and waterways (34%), which also registered a record high balance. In preliminary works, the balance of firms reporting an annual rise in workloads remained at a five-year high of 32% in Q4. Non-renewable (14%), water and sewerage (8%), communications (6%) and motorways/trunk roads (2%) also saw positive balances. A balance of 5% also reported an annual increase in workloads in both local roads and railways. However, a balance of 20% and 8% of firms reported an annual fall in workloads in nuclear and nuclear decommissioning, and airports respectively. For gas, a zero balance was recorded, with all firms reporting no change workloads.

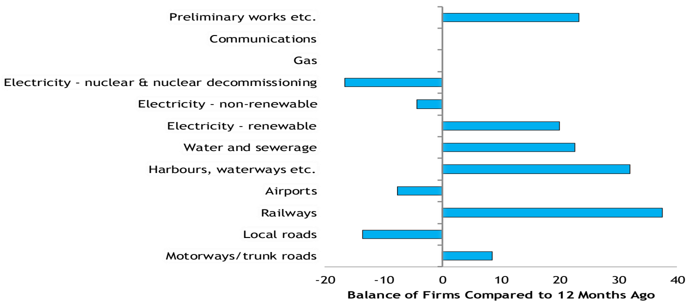
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



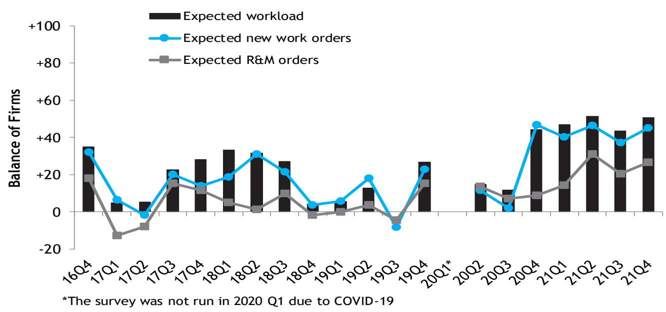
Over half (51%) of civil engineering contractors, on balance, in Britain reported an annual increase in orders in Q4, up from 27% in Q3 and the highest balance in seven years. Overall, 65% of firms reported that orders had increased and 21% reported that they were unchanged. In England, almost three-quarters (74%) of firms, on balance, reported an annual rise in orders in Q4, up from 57% in Q3 and the highest balance on record. In Scotland, 55% of firms reported that orders had increased in Q4 compared to a year earlier, and 9% reported that they had fallen, leaving a positive balance of 45%, the highest since 2016 Q2. However, in Wales, order books declined for a second consecutive quarter in Q4, according to a balance of 83% of firms.

Order Books — By Type of Work (GB)



Six sectors experienced an annual increase in order books, on balance, in Q4. In railways (38%) and harbours and waterways (32%), the balance for annual orders turned positive in Q4 after being negative in Q3. For harbours and waterways, this marked the highest balance on record. A balance of 23% also reported an annual increase in orders in both water and sewerage and preliminary works. Renewable (20%) and motorways/trunk roads (9%) also saw an annual increase in orders, on balance. Four sectors, however, reported an annual fall in orders in Q4, with nuclear and nuclear decommissioning (-17%) and local roads (-14%) registering the largest negative balances. Balances of 8% and 4% also reported an annual fall in orders in airports and non-renewable, respectively. Meanwhile, both gas and communications recorded zero balances in Q4.

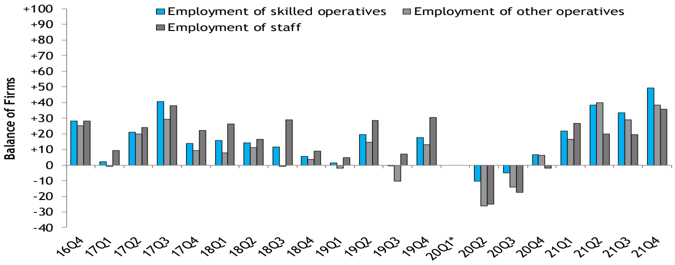
Expected Future Trends in the Next 12 Months



Expectations about future trading conditions in Great Britain remained positive in the fourth quarter of 2021. On balance, 51% of firms reported that workloads are expected to increase in the next 12 months. In England, 56% of firms expected workloads to increase over the next 12 months. This figure was 41% in Scotland and 30% in Wales. For new work orders, 45% of British firms anticipated an increase over the coming year, on balance. By nation; England (56%), Scotland (9%) and Wales (30%). In terms of R&M orders, 27% of British firms expected a rise over the next 12 months. This figure was 30% for English firms and 5% for Scottish firms. However, 17% of Welsh firms expected R&M orders to fall, on balance.

Trends in Employment

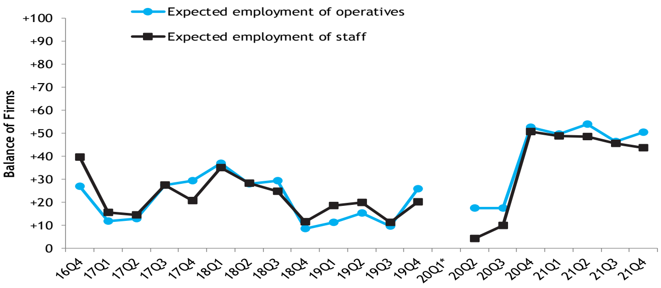
Employment Compared to 12 months Ago (GB)



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

Employment continued to rise across all nations, except Wales, in Q4. In Britain, employment of skilled operatives increased according to 49% of firms, the highest balance in seven years, whilst employment of other operatives rose according to a balance of 38% of firms. A balance of 36% was also reported for staff, the highest in nearly five years. In England, employment balances were +63% for skilled operatives (eight-year high), +61% for other operatives and +51% for staff (seven-year high). In Scotland, 68% of firms cited a rise in employment of skilled operatives, the highest balance in 14 years, whilst employment balances for other operatives (47%) and staff (50%) hit a near six-year high. In Wales, employment balances were -40% for staff, -30% for other operatives and 0% for skilled operatives.

Expected Employment in the Next 12 Months



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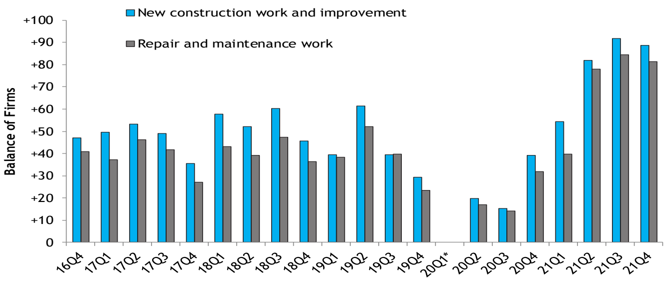
In Great Britain, hiring intentions for the next 12 months were positive in Q4, with 51% and 44% of firms expecting an increase in operatives and staff employment, respectively. In England, 59% and 56% of firms expected the employment of operatives and staff to increase, respectively. Both balances fell from their record highs in Q3, however. In Scotland, on balance, half of firms expected employment to increase for operatives and 36% for staff. Recruitment intentions also improved in Wales compared to Q3, with half and 30% of firms expecting the employment of operatives and staff, respectively, to increase over the next 12 months.

Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



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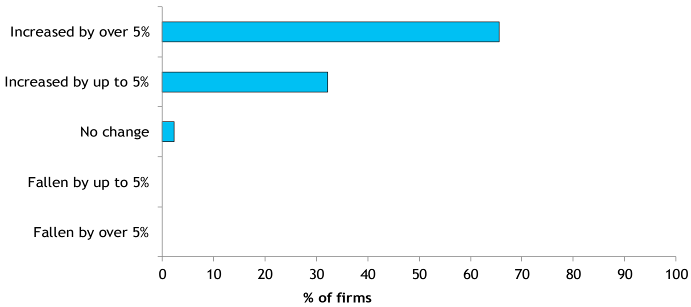
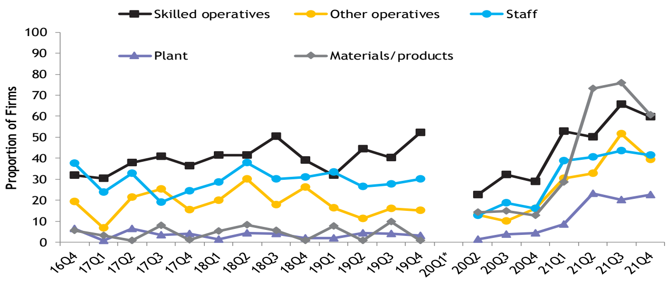
Compared to 12 months ago, tender prices in Great Britain were higher, on balance, for 89% of firms for new construction work and improvement, and 81% for repair and maintenance work. Although both balances dropped from their record highs in Q3, they still remained elevated by historical standards. In England, nearly all (95%) of firms reported an increase in tender prices for new construction work and improvement, the highest balance on record, whilst 85% reported increases for repair and maintenance work. In Scotland, on balance, 86% of firms reported higher tender prices for new construction work and improvement, and 85% for repair and maintenance work. In Wales, half of firms reported an increase in tender prices for new construction work and improvement, and 17% reported increases for repair and maintenance.

Costs Compared with 12 Months Ago (GB)



In Q4, a balance of 98% of firms in Great Britain reported an annual increase in costs, little changed from the record high balance of 99% in Q3. Overall, 32% of firms reported that costs rose by up to 5% compared to 12 months ago, and two-thirds reported rises of over 5%. In England, 97% of firms reported that costs increased compared to a year ago, down marginally from the record balance of 98% in Q3. 44% of firms reported rises by up to 5% and 54% by over 5%. For a second consecutive quarter, all firms surveyed in Scotland reported an annual increase in costs in Q4. This marked the joint-highest balance since 2015 Q3. 14% of firms reported rises by up to 5% and 86% by over 5%. In Wales, 90% of firms, on balance, reported an increase in costs over the last 12 months, with 40% of firms reporting increases by up to 5%, half by over 5%, whilst no firms reported decreases for the fifth consecutive quarter.

Contractors Unsatisfied with Supply (GB)



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Overall, issues with the supply of key resources eased slightly in Q4 from Q3. In Great Britain, 61%, 60% and 39% of firms reported dissatisfaction with the supply of materials/products, skilled operatives and other operatives respectively, down from the record high proportions registered in Q3. The proportion citing issues with the supply of staff also fell marginally from 43% in Q3 to 42% in Q4. For plant, 22% of firms cited dissatisfaction in Q4, up from 20% in Q3. At a national level, 63% of firms in England and 59% of firms in Scotland cited issues with the supply of materials/products, albeit both proportions were down from their record highs in Q3. The supply of skilled operatives also remained another concern, but the proportion of firms citing this as an issue in England (51%), Scotland (68%) and Wales (50%) fell from Q3.

Workload Trends Survey

1 Workload

Compared with 12 Months Ago	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
By Country																	
GB	-4	-1	+6	+10	-3	-17	+5	-1	+3		-43	-15	+11	+29	+44	+39	+45
England	+21	+9	+15	+33	+3	-25	+7	-13	+25		-38	-32	-20	+5	+45	+58	+56
Scotland	-21	-38	-33	-19	-42	-26	-4	+27	-13		-35	+39	+23	+24	+38	+33	+45
Wales	-33	+47	+64	+11	+11	-20	-6	-44	-29		-92	-57	+33	+93	+82	-25	-17
By Size of Firm																	
<115	-20	-26	-2	+8	+3	+8	0	+3	-6		-42	-27	-14	+27	+32	+16	+8
115-299	+4	-8	+22	+19	-3	-11	-8	-5	+16		-40	+22	+24	+13	+20	+42	+27
300-599	+57	0	0	-13	-13	-20	0	0	0		-36	-13	+38	+56	+46	+44	+67
600+	-100	+67	0	+50	0	-67	+50	0	0		-100	-50	0	0	+100	+50	+100
By Type of Work*																	
Motorways & trunk roads	-10	+8	-10	-13	+6	+2	-1	+3	-6		+3	-6	-12	+27	+12	-2	+2
Local roads	-24	-15	-21	-21	-15	-27	-1	-2	-18		-16	-22	+7	+18	+25	+12	+5
Railways	-32	+4	-13	-13	-28	-20	+11	-8	+9		+8	+16	+17	-22	-2	-27	+5
Airports	0	+22	+19	-9	-7	-37	+30	-24	-13		-81	-86	-46	-63	-62	-58	-8
Harbours, waterways etc.	-28	-15	+9	+4	+8	-21	-19	-37	-35		-45	-21	+4	+3	+28	-4	+34
Water & sewerage	+1	-14	+10	-1	-13	-19	+36	-44	-11		-27	-28	-34	-2	-8	+35	+8
Electricity - renewable															+46	+36	+52
Electricity - non-renewable															-7	+23	+14
Electricity - nuclear & nuclear decommissioning															0	-50	-20
Gas	+6	0	+42	-58	-11	+6	-53	-31	-28		-36	-60	-29	-86	-54	-38	0
Communications	+28	0	+21	-13	+15	+54	-22	+57	0		-33	-7	+38	-5	+58	+18	+6
Preliminary works, etc.	+10	+3	+2	+3	-9	-8	-25	-22	-20		-50	-39	+5	+13	+26	+27	+32

Weighted % Balance of Respondents

2 Expected Workload

In the Next 12 Months	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
By Country																	
GB	+28	+33	+32	+27	+4	+6	+13	0	+27		+15	+12	+44	+47	+51	+43	+51
England	+50	+34	+48	+25	+7	+17	+18	+8	+39		+24	+28	+53	+31	+66	+71	+56
Scotland	-4	+3	-20	-11	-4	-21	-38	-6	+27		-26	-17	+14	+47	+6	+7	+41
Wales	+35	+71	+70	+60	+13	+5	+37	-15	-32		+67	+5	+67	+64	+71	+17	+30
By Size of Firm																	
<115	+6	+8	+8	+17	-2	+19	-12	+5	+20		-8	-12	+14	+39	+45	+21	+20
115-299	+23	+25	+48	+53	0	0	0	+11	+46		+13	+26	+53	+44	+38	+62	+64
300-599	+67	+71	+33	+25	+25	0	+14	+20	+14		+9	+27	+50	+56	+46	+40	+43
600+	+33	+67	+50	0	0	0	+67	-50	0		+100	0	+57	+50	+100	+50	+100

Weighted % Balance of Respondents

3 Order Books

Compared with 12 Months Ago	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
By Country																	
GB	-10	+24	+11	+15	-8	-15	+15	-16	+13		-32	-8	+20	+26	+40	+27	+51
England	+13	+38	+18	+18	-6	-24	-3	-24	+37		-33	-16	+3	+9	+45	+57	+74
Scotland	-43	-3	-48	-12	-48	-26	+5	0	+16		-18	+40	+36	+10	+28	+8	+45
Wales	-6	+46	+27	+50	-14	-20	-6	-64	-35		-62	-85	+50	+93	+73	-25	-83
By Size of Firm																	
<115	-23	-14	+7	-3	-3	+6	-8	-13	+2		-28	-27	-10	+17	+26	+11	+8
115-299	-10	+40	+27	+13	-8	-18	0	-8	+25		-16	+28	+31	+7	+6	+31	+80
300-599	+29	0	-25	0	-50	0	-13	-33	+14		-40	-13	+17	+63	+46	+22	+40
600+	-33	+100	+100	+100	+50	-67	+100	0	0		-100	-25	+33	0	+100	+50	+100
By Type of Work*																	
Motorways & trunk roads	+2	-3	-2	-10	-16	+4	+4	-14	0		+9	-9	-16	+20	+28	+7	+9
Local roads	-29	-33	-23	-26	-22	-19	+8	-18	-22		-14	-26	+7	+18	+15	-12	-14
Railways	-30	+31	-19	+20	+16	-10	+5	-29	+14		-12	+9	-3	-44	0	-13	+38
Airports	-14	0	-4	-13	-23	-59	+33	0	-15		-85	-65	-36	-50	-50	-50	-8
Harbours, waterways etc.	-9	-8	+5	-4	+9	-32	-26	-48	-25		-37	-27	-19	-4	+28	-14	+32
Water & sewerage	+1	-14	+1	-5	-30	-22	+23	-44	-5		-12	-14	+5	+9	+6	+32	+23
Electricity - renewable															+59	+7	+20
Electricity - non-renewable															+3	+30	-4
Electricity - nuclear & nuclear decommissioning															+43	-33	-17
Gas	-13	-6	+57	-67	-32	-7	-53	-20	-32		-36	-56	0	-33	0	-38	0
Communications	+4	-5	+8	-11	+19	+7	-30	+50	+24		-28	-7	+36	+29	+75	+29	0
Preliminary works, etc.	+4	+1	+8	-9	-34	-18	-15	-24	-24		-47	-38	+7	+9	+35	+31	+23

Weighted % Balance of Respondents

4 Expected Trends in New Orders

In the Next 12 Months	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
New Work																	
By Country																	
GB	+14	+19	+31	+21	+4	+6	+18	-8	+23		+11	+2	+47	+40	+47	+37	+45
England	+36	+13	+49	+21	+10	+21	+21	+3	+33		+25	+30	+51	+31	+59	+74	+56
Scotland	-23	0	-26	-18	-6	-18	-46	-25	+30		-39	-36	+26	+42	-6	-11	+9
Wales	+25	+18	+70	+45	0	-10	+37	-15	-32		+60	-29	+67	+64	+71	+17	+30
By Size of Firm																	
<115	+2	+2	+10	+7	-13	+14	-15	-5	+16		-16	-19	+5	+33	+36	+21	+32
115-299	+12	+14	+44	+35	+6	+5	0	0	+39		0	+18	+42	+28	+38	+54	+45
300-599	+44	+71	+33	+38	+25	0	+14	+10	+14		+18	-9	+63	+56	+38	+30	+29
600+	0	0	+50	0	0	0	+100	-50	0		+100	+25	+71	+50	+100	+50	+100
R&M																	
By Country																	
GB	+12	+5	+1	+10	-2	0	+4	-5	+15		+14	+7	+9	+14	+31	+20	+27
England	+30	+1	+20	+17	+2	+15	+9	-2	+26		+13	+21	+18	+11	+36	+40	+30
Scotland	0	-3	-31	-15	-2	-3	-12	+3	+19		+5	+11	+21	+14	+10	-11	+5
Wales	-10	+6	+5	+5	-4	-53	+32	-35	-35		+79	-47	0	+10	+47	0	-17
By Size of Firm																	
<115	-8	+4	-8	+14	+2	+20	-27	+8	+17		-12	-8	-6	+13	+34	+11	+25
115-299	+13	-4	+19	+31	-7	-10	-8	-6	+22		0	+9	0	+24	+30	+25	+50
300-599	+25	+29	-11	-13	0	-13	+29	0	+40		+18	-9	+25	+13	+15	+11	+17
600+	+50	0	0	0	0	0	+33	-33	-50		+100	+50	+14	0	+67	+50	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

	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
By Country																	
Skilled operatives																	
GB	+14	+16	+14	+11	+6	+1	+20	-1	+17		-10	-5	+7	+22	+39	+33	+49
England	+29	+36	+29	+32	+14	-10	+36	+3	+27		-3	-20	-18	+2	+31	+62	+63
Scotland	-4	-16	-26	-9	-8	+10	-8	-3	-3		-22	+19	+41	+19	+48	+15	+68
Wales	+35	+18	+30	0	-12	-23	+32	-20	+7		-60	+5	0	+86	+71	-17	0
Other operatives																	
GB	+9	+8	+11	-1	+3	-2	+15	-10	+13		-26	-14	+6	+17	+40	+29	+38
England	+28	+25	+21	+21	+8	-18	+20	-8	+26		-14	-33	-16	0	+36	+64	+61
Scotland	-8	-27	-31	-31	-4	0	-12	-6	-12		-39	+9	+45	+9	+45	0	+47
Wales	-5	+18	+70	0	-8	-14	+37	-45	0		-79	+5	0	+86	+71	-17	-30
Staff																	
GB	+22	+26	+17	+29	+9	+5	+29	+7	+30		-25	-18	-2	+27	+20	+20	+36
England	+35	+18	+24	+49	+5	0	+25	0	+32		-20	-31	-28	+8	+8	+38	+51
Scotland	+2	+11	-23	+11	+12	0	-12	+19	+12		-43	+15	+33	+32	+10	0	+50
Wales	+40	+71	+60	+42	-21	-5	+37	+5	+34		-47	+5	0	+86	+71	-17	-40
By Size of Firm																	
Skilled operatives																	
<115	-7	-15	+7	+5	+2	+9	+12	+3	+11		-3	-5	-8	+24	+12	+21	+32
115-299	0	+14	+30	+18	-3	+27	+13	+5	+18		-4	-4	+33	+17	+19	+38	+27
300-599	+78	+43	+10	0	+11	0	+25	-10	+13		-27	-9	0	+33	+46	+30	+57
600+	0	+50	0	+33	+25	-67	+33	0	+50		0	0	0	0	+100	+50	+100
Other operatives																	
<115	-11	-13	-11	-2	+6	+16	0	-5	+6		-18	-19	-5	+9	+18	+26	+29
115-299	-4	+7	+26	0	-6	+19	-7	+5	+11		-22	-13	+29	+13	+19	+33	+20
300-599	+67	+29	+10	0	0	-10	+38	-20	+13		-45	-20	0	+33	+46	+20	+29
600+	0	+33	+33	0	+25	-67	+33	-25	+50		0	0	0	0	+100	+50	+100
Staff																	
<115	+7	-2	+2	+7	+6	+19	-6	+17	+30		-15	-10	-11	+18	+6	-5	+24
115-299	+11	+36	+22	+29	-3	+14	+7	0	+14		-22	-4	+29	+31	+19	+50	+50
300-599	+78	+29	+20	+13	+22	0	+38	+10	+50		-45	-18	-13	+22	+23	+20	+29
600+	0	+67	+33	+100	+25	-33	+100	0	+50		0	-50	-14	+50	+33	0	+50

Weighted % Balance of Respondents

6 Expected Employment

	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
In the Next 12 Months																	
By Country																	
Operative jobs																	
GB	+29	+37	+28	+29	+9	+11	+15	+10	+26		+18	+18	+53	+50	+54	+46	+51
England	+45	+36	+45	+15	+6	+24	+5	+13	+38		+31	+28	+50	+33	+60	+79	+59
Scotland	+8	+11	-6	+4	+8	-10	-12	+3	+21		-39	+6	+55	+50	+23	+26	+50
Wales	+35	+76	+70	+55	+25	+10	+37	-15	-27		+67	+26	+67	+93	+76	-17	+50
Employment of staff																	
GB	+21	+35	+28	+25	+12	+19	+20	+11	+20		+4	+10	+51	+49	+49	+45	+44
England	+44	+37	+42	+15	+1	+26	+13	+14	+28		+13	+14	+51	+29	+59	+76	+56
Scotland	-13	+11	-9	+7	+17	0	-8	+3	+24		-43	+6	+36	+50	+13	+11	+36
Wales	+30	+65	+70	+25	+25	0	+37	-15	-18		+71	+16	+67	+93	+71	-17	+30
By Size of Firm																	
Operative jobs																	
<115	+6	+14	+14	+24	+11	+24	-9	+8	+20		-3	-2	+8	+42	+58	+26	+44
115-299	+27	+21	+52	+41	+3	+5	+7	+16	+44		+17	+30	+63	+50	+29	+69	+73
300-599	+67	+71	+22	+38	0	+11	+14	+30	+14		+9	+18	+63	+56	+54	+40	+14
600+	+33	+75	0	0	+33	0	+67	-25	0		+100	+25	+71	+50	+100	+50	+100
Employment of staff																	
<115	+2	+16	+12	+24	+9	+15	-6	+8	+24		-22	-10	+3	+33	+39	+21	+20
115-299	+27	+21	+48	+35	0	+29	+21	+21	+32		+9	+26	+42	+44	+33	+69	+73
300-599	+33	+71	+33	+25	+25	+22	+14	+30	0		-9	+18	+63	+67	+46	+40	+14
600+	+33	+67	0	0	+33	0	+67	-25	0		+100	0	+86	+50	+100	+50	+100

Weighted % Balance of Respondents

7 Costs*

	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
Compared with 12 Months Ago (%)																	
GB																	
Falling	+1	+1	0	0	0	0	0	+1	0		0	+1	+1	0	+1	0	0
Unchanged	+2	+1	+6	0	+2	+1	0	0	+3		+4	+5	+1	0	0	0	0
Slower	+11	+12	+12	+11	+10	+7	+13	+18	+11		+24	+23	+19	+19	+1	+1	+2
Same rate	+81	+79	+72	+86	+85	+86	+81	+79	+82		+63	+63	+70	+63	+43	+47	+32
Faster	+5	+7	+9	+3	+3	+5	+6	+2	+5		+9	+8	+9	+18	+55	+52	+66
Cost Balances																	
By Country																	
GB	+82	+84	+75	+89	+86	+91	+87	+80	+84		+68	+65	+76	+81	+97	+99	+98
England	+88	+83	+82	+85	+79	+87	+76	+65	+82		+59	+54	+75	+68	+96	+98	+97
Scotland	+71	+73	+72	+91	+96	+93	+92	+91	+91		+87	+72	+83	+81	+97	+100	+100
Wales	+85	+100	+95	+90	+92	+95	+100	+90	+79		+93	+75	+86	+100	+100	+100	+90
By Size of Firm																	
<115	+74	+83	+81	+74	+78	+84	+74	+74	+79		+69	+58	+61	+88	+88	+95	+92
115-299	+82	+82	+82	+94	+79	+95	+93	+80	+82		+52	+57	+86	+89	+100	+100	+100
300-599	+100	+100	+80	+100	+100	+90	+88	+90	+88		+73	+73	+88	+78	+100	+100	+100
600+	+75	+75	+33	+100	+100	+100	+100	+75	+100		+100	+75	+71	+50	+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

	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
Compared with 12 Months Ago																	
New work																	
By Country																	
GB	+36	+58	+52	+60	+46	+39	+62	+39	+29		+20	+15	+39	+54	+82	+92	+89
England	+55	+75	+72	+52	+57	+31	+60	+56	+34		+18	+11	+24	+42	+84	+90	+95
Scotland	+4	+19	+13	+32	+17	+22	+27	+13	+19		+26	+20	+45	+64	+68	+93	+86
Wales	+45	+71	+90	+90	+46	+64	+95	+32	+11		+33	+28	+67	+93	+100	+83	+50
By Size of Firm																	
<115	+22	+27	+41	+46	+43	+26	+26	+25	+24		+24	+5	+24	+59	+70	+78	+76
115-299	+27	+50	+63	+59	+50	+33	+73	+42	+11		+17	+5	+47	+39	+79	+85	+100
300-599	+89	+86	+70	+88	+50	+67	+63	+60	+63		+9	+45	+63	+67	+85	+100	+86
600+	0	+100	0	+50	+33	+33	+100	+25	+50		+50	0	+29	+50	+100	+100	+100
R&M																	
By Country																	
GB	+27	+43	+39	+47	+36	+38	+52	+40	+23		+17	+14	+32	+40	+78	+85	+81
England	+37	+49	+53	+44	+39	+27	+28	+49	+31		+14	+12	+15	+36	+82	+88	+85
Scotland	-12	+15	+10	+27	+15	+30	+42	+25	+29		+39	+22	+55	+41	+65	+89	+85
Wales	+45	+59	+85	+75	+50	+55	+84	+21	0		+21	+5	0	+50	+88	+50	+17
By Size of Firm																	
<115	+19	+24	+32	+36	+38	+23	+16	+25	+21		+17	+10	+23	+57	+69	+63	+75
115-299	+35	+42	+48	+40	+29	+25	+46	+24	+12		+5	+5	+18	+31	+63	+83	+100
300-599	+75	+86	+50	+71	+50	+70	+63	+70	+67		+18	+36	+63	+50	+83	+90	+67
600+	-25	+33	0	+50	+33	+33	+100	+33	0		+50	0	+29	0	+100	+100	+100

Weighted % Balance of Respondents

9 Supply of Resources Required

	Q4	2018Q1	Q2	Q3	Q4	2019Q1	Q2	Q3	Q4	2020Q1**	Q2	Q3	Q4	2021Q1	Q2	Q3	Q4
Skilled Operatives																	
GB	36	41	42	50	39	32	44	40	52		23	32	29	53	50	66	60
England	37	39	40	63	40	32	42	45	52		28	28	18	39	40	69	51
Scotland	42	51	49	46	44	45	46	53	63		22	47	55	64	65	74	68
Wales	0	29	0	15	38	9	0	10	36		13	35	67	64	94	58	50
Other Operatives																	
GB	15	20	30	18	26	16	11	16	15		13	10	16	30	33	52	39
England	11	15	26	15	19	8	16	22	18		17	12	14	16	34	55	41
Scotland	23	32	33	33	35	33	19	13	19		18	6	33	44	26	37	32
Wales	0	24	0	5	33	5	0	5	11		0	5	0	29	47	58	50
Staff																	
GB	24	29	38	30	31	33	26	28	30		13	19	16	39	41	43	42
England	32	32	33	33	12	31	22	36	19		18	22	7	31	41	55	44
Scotland	19	27	44	25	54	48	23	25	38		13	13	21	44	19	19	23
Wales	0	0	0	0	50	9	0	5	32		0	5	67	57	71	50	50
Plant																	
GB	4	1	4	4	2	2	4	4	3		1	4	4	8	23	20	22
England	8	1	7	0	3	2	2	9	0		2	3	4	6	27	17	10
Scotland	0	0	3	14	0	3	0	0	3		0	6	5	11	32	37	32
Wales	0	6	0	0	4	0	0	0	0		0	5	0	0	0	0	40
Materials and Products																	
GB	1	5	8	6	1	7	1	10	1		14	15	13	29	73	76	61
England	3	4	10	4	0	13	0	8	2		5	6	7	31	71	74	63
Scotland	0	3	13	11	0	3	4	0	0		13	19	19	31	74	81	59
Wales	0	0	0	0	4	5	0	0	0		13	5	0	7	76	50	40

% 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 2021 Q4 survey totalled 47. 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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