# Workload Trends 2013 Q1

## Conditions improve marginally for Britain overall

### Weighted Balances (%)

**Change on 12 Months Ago**

| **Workload** | |
|---|---|
| 2012 Q1 | +1 |
| 2013 Q1 | +1 |

| **Tender Prices** | |
|---|---|
| ***New Work*** | |
| 2012 Q1 | +2 |
| 2013 Q1 | -7 |
| ***R&M Work*** | |
| 2012 Q1 | +1 |
| 2013 Q1 | -6 |

| **Order Books** | |
|---|---|
| 2012 Q1 | +18 |
| 2013 Q1 | -7 |

**Over the Next 12 Months**

| **Expected Workload** | |
|---|---|
| 2012 Q1 | +10 |
| 2013 Q1 | +1 |

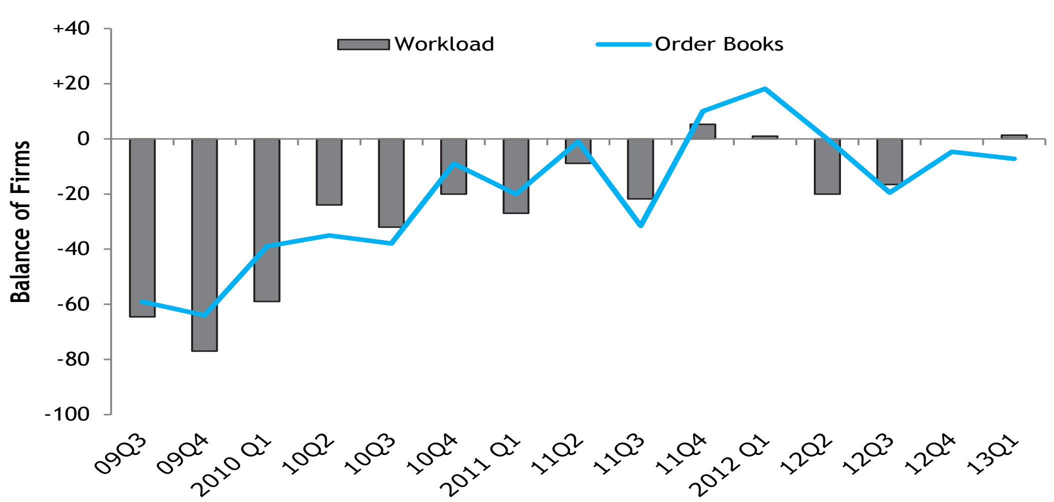
| **Expected Orders** | |
|---|---|
| ***New Work*** | |
| 2012 Q1 | +8 |
| 2013 Q1 | +12 |
| ***R&M Work*** | |
| 2012 Q1 | +6 |
| 2013 Q1 | +13 |

### *Overview*

**Changes in the 12 months to 2013 Q1:**

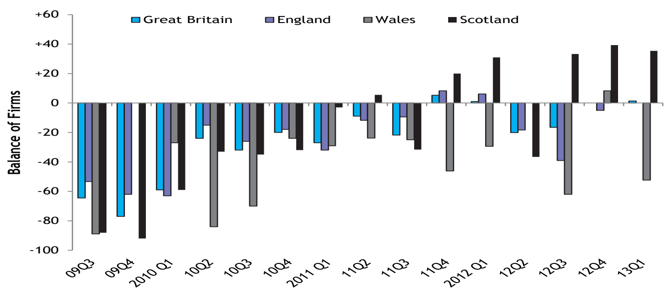
- Workloads remain flat (+1) for a second consecutive quarter.
- Order books remain negative for the third consecutive quarter, on balance, 7% reported declines.
- Employment continues to show signs of improvement and firms are optimistic about the next twelve months.
- Costs and tender prices continue to move in opposite directions squeezing margins further.
- English and Scottish firms remain cautiously optimistic but Welsh firms see the worst orders and expectations data for 11 quarters.

**Change in Workload and Order Books - Great Britain**



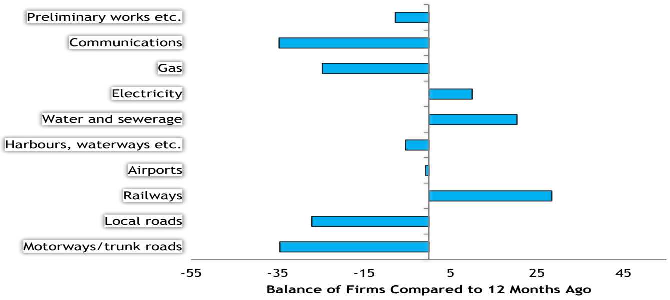
# Trends in Workload

## Workloads Compared to 12 Months Ago




For the second consecutive quarter, workloads remained broadly flat (+1%) on balance, in Great Britain. By proportion, respondents were broadly distributed equally between those reporting higher, same and lower workloads. In England, a zero balance ended three quarters of decline, 38% of firms reported an increase in workloads. Welsh growth in 2012 Q4 was short-lived as 2013 Q1 marked a strong return to the trend of declining workloads. On balance, 52% of Welsh firms reported lower workloads compared to 12 months ago. For a third consecutive quarter Scottish firms reported an increase in workloads, 45% reported an increase in Q1 leaving a positive balance overall of 35%.

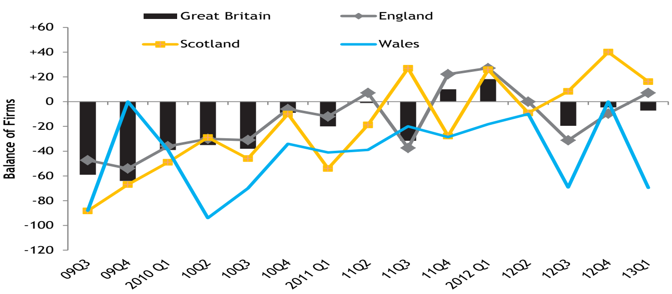
## Workload — By Type of Work (GB)




In 2013 Q1, 3 out of 10 sub-sectors reported positive balances compared to 4 out of 10 in 2012 Q4. The three sectors reporting positive balances were, electricity (10%), water and sewerage (20%), and railways (28%), all of which also reported positive balances in 2012 Q4. However, following a marginally positive balance for 2012 Q4 (+1%), the gas sub-sector reported a sharp decline in workloads of 25%, on balance. The remaining 6 sub-sectors remained negative in the first quarter; preliminary works 8%, communications 35%, harbours and waterways 5%, airports 1%, local roads 27% and motorways and trunk roads 34%.

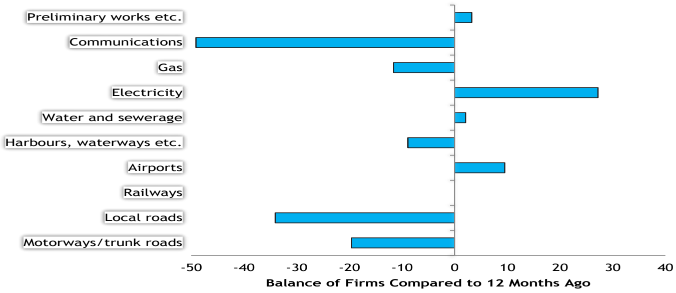
# Trends in Orders and Future Expectations

## Orders Compared to 12 Months Ago



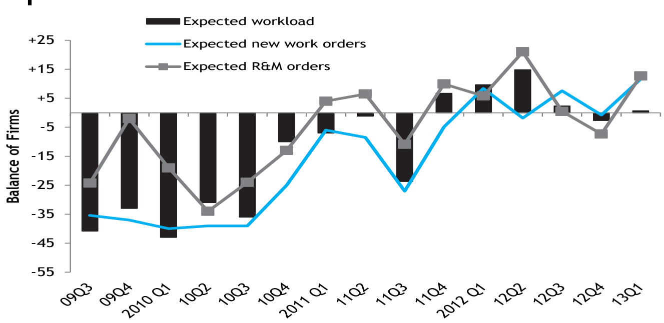

Order books in Great Britain declined for a third consecutive quarter in 2013 Q1. On balance, 7% of respondents reported declines compared to a year earlier, with 38% reporting falls. A positive balance of 7% for England, ended three consecutive quarters of decline. In Scotland, an increase in orders compared to a year earlier was reported for the third consecutive quarter. In total, 45% of all respondents reported an increase in workloads compared to a year earlier, translating into a positive 16% balance. Welsh respondents reported the lowest orders since 2010 Q3, when similarly, on balance, 70% of firms reported declining workloads compared to a year earlier, no firms reported that orders had increased.

## Order Books — By Type of Work (GB)




Orders for preliminary works were slightly positive (3%) on balance, with responses broadly spread even across higher, same and lower. Communications showed the lowest balance, with 49% of respondents, on balance, reporting declines. Gas orders continue to fall, 36% of respondents reported lower orders leaving a balance of –12% for the quarter. Electricity, and water and sewerage held positive balances in Q1; 27% and 2%, respectively. Harbours and railways reported a negative balance of 9%, airports reported a positive balance of 10% and railways reported a zero balance. Large negative balances were reported in local roads, and motorways and trunk roads, reporting balances of 34% and 20%, respectively.

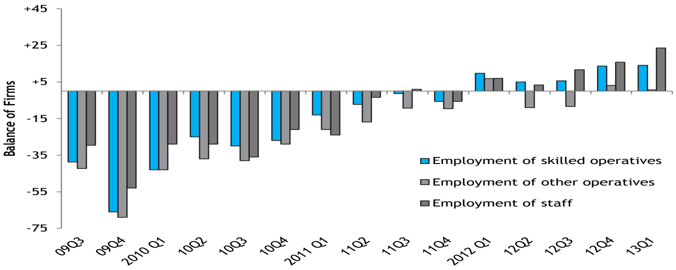
## Expected Future Trends in the Next 12 Months




Expected workloads in Great Britain were broadly flat (+1%) for a third consecutive quarter, and balances of +22%, -66% and -5% were held across England Wales and Scotland, respectively. However, expected new work orders held a positive balance of 12% in Great Britain, with positive balances of 39% and 7% for England and Scotland, respectively. Constraining this growth was a large negative balance held by Welsh respondents, as 69% reported expectations of lower new work orders. For R&M orders, respondents revealed a similar pattern, overall for Great Britain, on balance, 13% reported expectations of higher orders. By nation, balance were as follows; in England, a positive 24%, and in Scotland, a positive 10%, but in Wales, negative 77%.

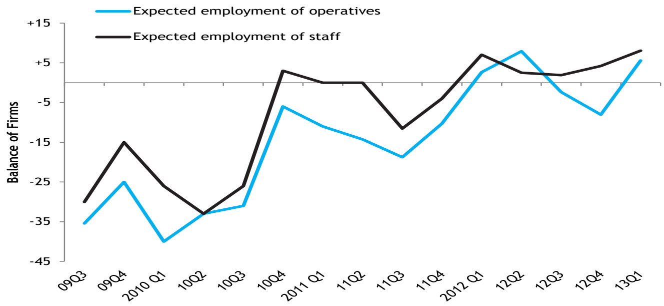
# Trends in Employment

## Employment Compared to 12 months Ago (GB)




The positive trend in employment which began in 2012 Q1, continued into Q1 of 2013, with positive balances reported for all employee categories for the second consecutive quarter. Respondents reported balances of +14% for skilled operatives, +1% for other operatives and +24% for employment of staff. In England, balances were as follows; +7% for skilled operatives, +20% for staff but -4% for other operatives. In Scotland, on balance, 41% of respondents reported an increase in skilled operatives, 19% an increase in other operatives and 35% an increase for staff. In Wales, 3% of respondents reported declines in the employment of skilled operatives, 7% in other operatives but a 7% rise in staff, on balance.

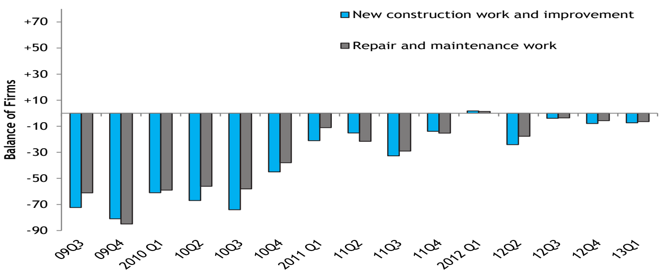
## Expected Employment in the Next 12 Months




Employment expectations for the next twelve months returned to optimism following a mixed final quarter of 2012. On balance, 6% and 8% of respondents expect increases in the employment of operatives and staff, respectively. However, for Great Britain, 65% of respondents expect no change in the employment of operatives and staff over the next twelve months. Positive balances for operatives and staff of 21% and 23%, respectively, were reported by English respondents. Negative balances across all types were reported for Scotland and Wales. For Scotland, 6% for operatives and 4% for staff, and for Wales, 24% for operatives and 17% for staff.

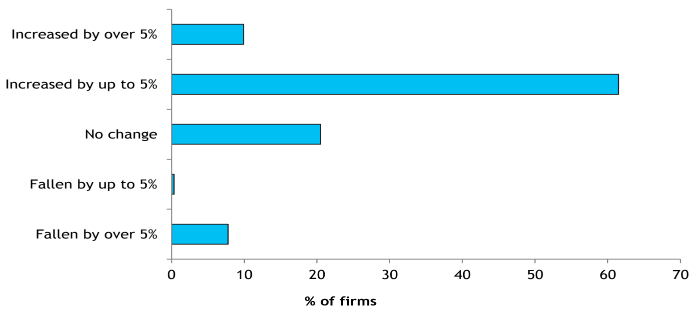
# Trends in Costs, Tender Prices and Supply Constraints

## Tender Prices Compared to 12 Months Ago (GB)



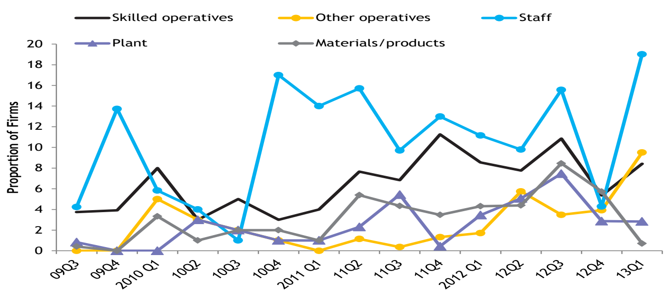

Compared to 12 months ago, tender prices were lower, on balance, for 7% and 6% of firms for new construction work and improvements, and for R&M work, respectively. In England, 12% of firms on balance reported lower tender prices for new construction work and improvement and19% reported lower prices for repair and maintenance. In Wales, no firms reported an increase in tender prices for new construction and improvements or repair and maintenance, instead, on balance, 86% and 62% of firms reported declines. Only in Scotland were increased tender prices reported, 2% of respondents reported increases in new construction work and improvement and 13% in repair and maintenance, on balance.

## Costs Compared with 12 Months Ago (GB)




The majority of firms (61%) in Great Britain reported that costs had increased by up to 5% compared to 12 months earlier with 10% reporting increases over 5%. Overall, a balance of 63% of firms reported an increase in costs. In England, 62% of firms, on balance, reported an increase in costs. 4% reported rises of more than 5%, 66% by up to 5%, 21% reported no change and 9% of respondents reported falls by more than 5%. Firms in Scotland reported the largest increase in costs compared to 12 months ago, on balance, 81% of firms reported increased costs with no firms reporting declining costs. However, in Wales, only 10% of firms, on balance, reported an increase in costs over the last 12 months, 41% of firms reported declines, 38% of firms by more than 5%.

## Contractors Unsatisfied with Supply (GB)




The supply of suitable workers worsened significantly compared to the final quarter of 2012 for civil engineering firms in Great Britain. 8% and 19% reported dissatisfactory supply of skilled operatives and staff, compared to only 5% and 4%, respectively in 2012 Q4. The percentage reporting dissatisfaction for other operatives worsened quarter-on-quarter, 10% of firms reported dissatisfaction. Improvements were seen in plant and materials/products, on balance, with only 3% and 1% of firms reporting dissatisfaction, respectively. In England, the most commonly reported dissatisfaction was staff (13%), in Scotland it was also staff (28%) but in Wales other operatives (14%).

# Workload Trends Survey

## 1 Workload

| Compared with 12 Months Ago | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | -65 | -77 | -59 | -24 | -32 | -20 | -27 | -9 | -22 | +5 | +1 | -20 | -17 | 0 | +1 |
| England | -53 | -62 | -63 | -15 | -26 | -18 | -32 | -12 | -9 | +8 | +6 | -18 | -39 | -5 | 0 |
| Scotland | -88 | -92 | -59 | -33 | -35 | -32 | -3 | +6 | -32 | +20 | +31 | -37 | +33 | +39 | +35 |
| Wales | -89 | n/a | -27 | -84 | -70 | -24 | -29 | -24 | -25 | -46 | -29 | 0 | -62 | +8 | -52 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | -52 | -77 | -49 | -49 | -31 | -23 | -38 | -11 | -12 | -10 | -18 | -28 | -8 | +8 | -10 |
| 115-299 | -78 | -88 | -48 | -46 | -59 | -29 | -10 | 0 | 0 | -14 | +8 | +5 | +27 | -22 | +13 |
| 300-599 | -82 | -60 | -38 | -34 | -20 | 0 | 0 | 0 | -29 | -33 | +33 | 0 | 0 | -20 | +60 |
| 600+ | -52 | -37 | -79 | +4 | -16 | -16 | -35 | -13 | -35 | +49 | 0 | -33 | -51 | +7 | -7 |
| ***By Type of Work*** | | | | | | | | | | | | | | | |
| Motorways & trunk roads | -29 | -57 | -23 | -51 | -40 | -73 | -61 | -54 | -58 | -37 | -43 | -53 | -37 | -33 | -34 |
| Local roads | -55 | -81 | -50 | -54 | -49 | -29 | -37 | -43 | -30 | -41 | -30 | -42 | -50 | -30 | -27 |
| Railways | -18 | -33 | -16 | -16 | -17 | -2 | +24 | +8 | +15 | +41 | +32 | +52 | +21 | +53 | +28 |
| Airports | -9 | -40 | -32 | -47 | -18 | -26 | -23 | -15 | -14 | -1 | -23 | -5 | +2 | -17 | -1 |
| Harbours, waterways etc. | -34 | -34 | -22 | -15 | -32 | -30 | -19 | -27 | -11 | -10 | -3 | +11 | -15 | -7 | -5 |
| Water & sewerage | -44 | -48 | -63 | -25 | -23 | -15 | +23 | +14 | +23 | +12 | +8 | +23 | +27 | +1 | +20 |
| Electricity | -25 | -28 | -53 | -12 | -4 | +35 | +17 | +61 | +20 | -4 | +41 | +28 | +19 | +8 | +10 |
| Gas | -5 | -63 | -29 | -37 | +6 | -24 | -20 | -22 | -28 | -18 | +14 | -2 | +24 | +1 | -25 |
| Communications | -27 | -15 | +1 | +12 | -10 | -7 | -28 | -63 | -41 | -35 | -23 | +1 | -13 | -34 | -35 |
| Preliminary works, etc. | -69 | -83 | -48 | -18 | -26 | -23 | -8 | -17 | -13 | -15 | +3 | -7 | -10 | -12 | -8 |

Weighted % Balance of Respondents

## 2 Expected Workload

| In the Next 12 Months | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | -41 | -33 | -43 | -31 | -36 | -10 | -7 | -1 | -24 | +7 | +10 | +15 | +2 | -3 | +1 |
| England | -36 | -36 | -47 | -33 | -34 | -10 | -9 | +9 | -25 | +9 | +16 | +27 | +10 | +4 | +22 |
| Scotland | -41 | -33 | -27 | +6 | -27 | +5 | +5 | -13 | +19 | +8 | -6 | 0 | +8 | -12 | -5 |
| Wales | -74 | n/a | -50 | -78 | -79 | -25 | -23 | -9 | -35 | -47 | +8 | -18 | -52 | -22 | -66 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | -24 | -36 | -6 | -43 | -45 | -27 | -18 | +11 | -16 | -7 | +5 | -10 | -9 | -8 | -6 |
| 115-299 | -47 | -16 | -36 | -10 | -22 | +7 | +8 | -8 | -4 | +5 | 0 | +4 | +19 | +14 | +22 |
| 300-599 | -50 | -60 | -56 | -34 | -29 | 0 | 0 | -14 | -13 | -13 | +11 | +21 | +11 | -10 | -14 |
| 600+ | -43 | -28 | -68 | -34 | -33 | -11 | -12 | -1 | -39 | +24 | +17 | +30 | 0 | -3 | 0 |

Weighted % Balance of Respondents

## 3 Order Books

| Compared with 12 Months Ago | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | -59 | -64 | -39 | -35 | -38 | -9 | -20 | -1 | -32 | +10 | +18 | 0 | -20 | -5 | -7 |
| England | -47 | -54 | -36 | -30 | -31 | -6 | -12 | +7 | -37 | +22 | +27 | 0 | -31 | -10 | +7 |
| Scotland | -88 | -67 | -49 | -29 | -46 | -10 | -54 | -19 | +27 | -28 | +26 | -9 | +8 | +40 | +16 |
| Wales | -88 | n/a | -39 | -94 | -70 | -34 | -41 | -39 | -20 | -29 | -18 | -10 | -69 | 0 | -70 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | -54 | -82 | -46 | -42 | -27 | -23 | -35 | -11 | -15 | -2 | -14 | -12 | -14 | -4 | -21 |
| 115-299 | -79 | -93 | -64 | -59 | -52 | -24 | -26 | -13 | -5 | -16 | -21 | +10 | +17 | -6 | +24 |
| 300-599 | -80 | -40 | -13 | -40 | -35 | 0 | +33 | +20 | +14 | -50 | +57 | +25 | -13 | -25 | 0 |
| 600+ | -34 | -45 | -30 | -20 | -35 | +4 | -5 | +3 | -63 | +66 | +35 | -9 | -40 | 0 | -10 |
| ***By Type of Work*** | | | | | | | | | | | | | | | |
| Motorways & trunk roads | -36 | -56 | -43 | -54 | -62 | -76 | -74 | -46 | -58 | -23 | -22 | -35 | -46 | -21 | -20 |
| Local roads | -61 | -79 | -59 | -66 | -56 | -31 | -39 | -42 | -36 | -39 | -32 | -43 | -45 | -18 | -34 |
| Railways | -9 | +15 | +13 | -29 | -51 | +5 | +14 | +12 | +15 | +36 | +32 | +49 | +7 | +36 | 0 |
| Airports | -26 | -56 | -26 | -67 | -53 | -27 | -17 | +11 | -16 | +18 | -11 | +2 | -5 | +16 | +10 |
| Harbours, waterways etc. | -44 | +8 | -25 | -39 | -32 | -19 | -15 | -27 | -18 | +1 | -7 | +5 | -14 | -6 | -9 |
| Water & sewerage | -45 | -81 | -41 | -8 | -23 | +1 | +22 | +5 | +9 | +11 | -1 | +27 | +22 | -26 | +2 |
| Electricity | -45 | -28 | -42 | -28 | -1 | +25 | +30 | +22 | +9 | 0 | +22 | +12 | +27 | +14 | +27 |
| Gas | -34 | -37 | -48 | -36 | -49 | -19 | -19 | -31 | -31 | +1 | -2 | -8 | +34 | -19 | -12 |
| Communications | -35 | -91 | -38 | -14 | -16 | -20 | -2 | -27 | -30 | -60 | -33 | -25 | -13 | -41 | -49 |
| Preliminary works, etc. | -62 | -78 | -40 | -28 | -25 | -25 | -24 | -25 | -26 | -27 | +2 | -22 | -20 | +1 | +3 |

Weighted % Balance of Respondents

## 4 Expected Trends in New Orders

| In the Next 12 Months | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **New Work** | | | | | | | | | | | | | | | |
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | -35 | -37 | -40 | -39 | -39 | -25 | -6 | -8 | -27 | -5 | +8 | -2 | +8 | -1 | +12 |
| England | -29 | -36 | -43 | -37 | -33 | -26 | -3 | -6 | -32 | -5 | +15 | +7 | +26 | +17 | +39 |
| Scotland | -52 | -45 | -27 | -31 | -46 | +10 | -3 | -9 | +31 | +15 | -9 | -12 | +2 | -17 | +7 |
| Wales | -48 | n/a | -54 | -78 | -82 | -52 | -29 | -9 | -39 | -58 | +4 | -9 | -39 | -11 | -69 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | -34 | -40 | -11 | -52 | -46 | -31 | -15 | +2 | -23 | 0 | +11 | -22 | -9 | -14 | -8 |
| 115-299 | -45 | -33 | -44 | -24 | -22 | 0 | -5 | -8 | +7 | -22 | -13 | +8 | +6 | +9 | +26 |
| 300-599 | -50 | -60 | -45 | -59 | -49 | 0 | +25 | 0 | -13 | -13 | +11 | +7 | +22 | -10 | +14 |
| 600+ | -22 | -45 | -56 | -34 | -33 | -40 | -7 | -15 | -48 | +3 | +17 | 0 | +13 | +8 | +15 |
| **R&M** | | | | | | | | | | | | | | | |
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | -24 | -2 | -19 | -34 | -24 | -13 | +4 | +6 | -11 | +10 | +6 | +21 | +0 | -7 | +13 |
| England | -11 | +13 | -18 | -30 | -15 | -11 | +1 | +22 | +1 | +17 | +22 | +38 | +22 | +11 | +24 |
| Scotland | -44 | -23 | -10 | -40 | -39 | -27 | +17 | +19 | +11 | -13 | -19 | +7 | -15 | -41 | +10 |
| Wales | -76 | n/a | -36 | -68 | -70 | -25 | -5 | -14 | -39 | -23 | -21 | -31 | -61 | -36 | -77 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | -35 | -23 | -16 | -45 | -42 | -25 | +3 | +4 | -19 | +2 | +2 | -14 | -22 | -17 | -16 |
| 115-299 | -45 | -28 | -23 | -22 | -22 | 0 | 0 | -8 | -13 | -10 | -14 | -5 | +20 | -14 | +9 |
| 300-599 | -50 | -50 | -33 | -59 | -39 | 0 | 0 | 0 | -25 | -29 | -11 | +14 | -11 | -29 | -17 |
| 600+ | +10 | +73 | -12 | -27 | -5 | -15 | +7 | +16 | -3 | +37 | +24 | +56 | +13 | +8 | +33 |

Weighted % Balance of Respondents

## 5 Employment

| | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Compared with 12 Months Ago** | | | | | | | | | | | | | | | |
| ***By Country*** | | | | | | | | | | | | | | | |
| **Skilled operatives** | | | | | | | | | | | | | | | |
| GB | -39 | -66 | -43 | -25 | -30 | -27 | -13 | -7 | -1 | -6 | +10 | +5 | +6 | +14 | +14 |
| England | -30 | -67 | -49 | -24 | -27 | -23 | -16 | -14 | -1 | -7 | 0 | +1 | 0 | +9 | +7 |
| Scotland | -55 | -54 | -15 | -15 | -31 | -42 | -5 | +6 | +7 | -4 | +8 | -14 | +24 | +23 | +41 |
| Wales | -70 | n/a | -41 | -58 | -56 | -42 | -11 | -13 | +5 | -21 | +4 | +41 | -29 | +39 | -3 |
| **Other operatives** | | | | | | | | | | | | | | | |
| GB | -42 | -69 | -43 | -37 | -38 | -29 | -21 | -17 | -9 | -10 | +7 | -9 | -8 | +3 | +1 |
| England | -30 | -66 | -48 | -39 | -33 | -25 | -26 | -22 | -8 | -6 | -1 | -22 | -18 | -3 | -4 |
| Scotland | -68 | -63 | -20 | -12 | -37 | -52 | -7 | -19 | -5 | -46 | 0 | -14 | +8 | +16 | +19 |
| Wales | -81 | n/a | -54 | -74 | -82 | -44 | -11 | -29 | -9 | -32 | +4 | +25 | -35 | +28 | -7 |
| **Staff** | | | | | | | | | | | | | | | |
| GB | -30 | -53 | -29 | -29 | -36 | -21 | -24 | -3 | +1 | -6 | +7 | +3 | +12 | +16 | +24 |
| England | -26 | -51 | -31 | -34 | -36 | -19 | -18 | -6 | -4 | -6 | -1 | -5 | +3 | +5 | +20 |
| Scotland | -41 | -46 | -25 | -2 | -34 | -40 | -51 | 0 | +36 | 0 | 0 | -7 | +34 | +18 | +35 |
| Wales | -35 | n/a | -13 | -47 | -43 | -29 | -6 | -4 | +4 | -53 | -26 | +18 | -19 | +33 | +7 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| **Skilled operatives** | | | | | | | | | | | | | | | |
| <115 | -36 | -68 | -38 | -39 | -31 | -23 | -20 | 0 | -6 | -5 | -2 | -16 | -14 | +13 | -4 |
| 115-299 | -67 | -78 | -41 | -54 | -26 | -35 | -5 | -16 | +15 | -22 | +4 | +12 | +18 | +17 | +18 |
| 300-599 | -42 | 0 | -45 | -10 | -26 | -25 | -50 | +14 | 0 | -13 | +33 | +7 | 0 | +20 | +29 |
| 600+ | -22 | -65 | -45 | -8 | -38 | -24 | -9 | -12 | -6 | +4 | +10 | +12 | +16 | +11 | +19 |
| **Other operatives** | | | | | | | | | | | | | | | |
| <115 | -51 | -72 | -49 | -51 | -31 | -25 | -13 | -9 | -10 | -10 | -9 | -21 | -14 | +3 | -13 |
| 115-299 | -80 | -77 | -49 | -63 | -52 | -43 | -22 | -40 | -4 | -18 | -4 | +8 | +6 | 0 | +14 |
| 300-599 | -50 | 0 | -33 | -10 | -26 | -25 | -50 | -14 | -11 | -38 | +22 | 0 | +11 | +10 | +29 |
| 600+ | -8 | -65 | -39 | -25 | -38 | -24 | -21 | -12 | -11 | +4 | +15 | -14 | -20 | +2 | -3 |
| **Staff** | | | | | | | | | | | | | | | |
| <115 | -29 | -47 | -21 | -35 | -25 | -4 | -13 | 0 | 0 | -12 | -9 | -6 | -5 | +1 | +8 |
| 115-299 | -57 | -67 | -37 | -51 | -34 | -32 | -13 | -24 | +7 | -4 | -9 | +28 | +18 | +30 | +18 |
| 300-599 | -25 | -25 | -22 | +4 | -14 | -25 | -75 | 0 | 0 | -13 | +22 | -7 | +22 | +30 | +43 |
| 600+ | -14 | -43 | -30 | -25 | -36 | -24 | -16 | +2 | -1 | 0 | +17 | +3 | +16 | +14 | +28 |

Weighted % Balance of Respondents

## 6 Expected Employment

| | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **In the Next 12 Months** | | | | | | | | | | | | | | | |
| ***By Country*** | | | | | | | | | | | | | | | |
| **Operative jobs** | | | | | | | | | | | | | | | |
| GB | -35 | -25 | -40 | -33 | -31 | -6 | -11 | -14 | -19 | -10 | +3 | +8 | -2 | -8 | +6 |
| England | -32 | -20 | -42 | -31 | -23 | -2 | -10 | -12 | -24 | -18 | +4 | +16 | +7 | -1 | +21 |
| Scotland | -41 | -35 | -25 | -24 | -49 | -5 | 0 | -28 | +10 | +13 | -6 | -2 | -6 | -10 | -6 |
| Wales | -48 | n/a | -55 | -73 | -70 | -38 | -41 | -18 | -26 | -47 | +4 | -27 | -48 | -28 | -24 |
| **Employment of staff** | | | | | | | | | | | | | | | |
| GB | -30 | -15 | -26 | -33 | -26 | +3 | 0 | 0 | -12 | -4 | +7 | +3 | +2 | +4 | +8 |
| England | -27 | -14 | -25 | -32 | -15 | +7 | 0 | +4 | -22 | -5 | +12 | +11 | +9 | +12 | +23 |
| Scotland | -36 | -12 | -20 | -27 | -56 | 0 | 0 | +6 | +21 | +8 | -9 | -17 | +6 | -12 | -4 |
| Wales | -37 | n/a | -45 | -63 | -61 | -21 | -12 | -9 | -22 | -47 | 0 | -18 | -42 | -11 | -17 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| **Operative jobs** | | | | | | | | | | | | | | | |
| <115 | -31 | -40 | -5 | -41 | -25 | -21 | -28 | +7 | -11 | -3 | -7 | -7 | -13 | -8 | 0 |
| 115-299 | -49 | -33 | -35 | -10 | -34 | -4 | 0 | -29 | 0 | -5 | +4 | 0 | +6 | +9 | +13 |
| 300-599 | -50 | -40 | -56 | -59 | -43 | 0 | +25 | -29 | -25 | -25 | +11 | +7 | 0 | -30 | -29 |
| 600+ | -22 | 0 | -56 | -31 | -25 | 0 | -16 | -15 | -28 | -13 | +4 | +20 | 0 | -7 | +13 |
| **Employment of staff** | | | | | | | | | | | | | | | |
| <115 | -16 | -28 | -5 | -35 | -23 | -7 | -15 | +11 | -7 | -7 | -2 | -7 | -7 | -3 | +1 |
| 115-299 | -49 | -11 | -29 | -9 | -36 | +4 | +13 | -17 | +4 | 0 | +4 | +8 | +13 | +14 | +9 |
| 300-599 | -42 | -20 | -33 | -59 | -32 | 0 | +25 | -29 | -13 | -25 | +11 | -7 | +11 | -10 | 0 |
| 600+ | -22 | 0 | -56 | -38 | -12 | +10 | -5 | +8 | -20 | +3 | +12 | +10 | 0 | +11 | +13 |

Weighted % Balance of Respondents

## 7 Costs

| | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3* | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Compared with 12 Months Ago (%)** | | | | | | | | | | | | | | | |
| ***GB*** | | | | | | | | | | | | | | | |
| Falling | 19 | 25 | 29 | 10 | 9 | 4 | 6 | 5 | | | | | | | |
| Unchanged | 39 | 30 | 9 | 15 | 31 | 19 | 18 | 12 | | | | | | | |
| Slower | 31 | 33 | 39 | 28 | 30 | 29 | 9 | 13 | | | | | | | |
| Same rate | 9 | 7 | 23 | 25 | 25 | 31 | 25 | 33 | | | | | | | |
| Faster | 3 | 5 | 0 | 23 | 6 | 18 | 42 | 37 | | | | | | | |
| **Cost Balances** | | | | | | | | | | | | | | | |
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | +24 | +20 | +33 | +66 | +52 | +74 | +70 | +78 | +40 | +70 | +70 | +54 | +71 | +67 | +63 |
| England | +18 | +15 | +48 | +50 | +54 | +80 | +70 | +72 | +42 | +72 | +73 | +48 | +77 | +68 | +62 |
| Scotland | +38 | +52 | +46 | +66 | +40 | +9 | +67 | +88 | +49 | +54 | +58 | +53 | +70 | +57 | +81 |
| Wales | +37 | n/a | +18 | +53 | +47 | +92 | +76 | +96 | +70 | +63 | +72 | +50 | +87 | +78 | +10 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | +46 | +56 | +73 | +77 | +77 | +91 | +79 | +91 | +69 | +79 | +75 | +66 | +68 | +78 | +82 |
| 115-299 | +10 | +39 | +37 | +13 | +37 | +61 | +77 | +76 | +63 | +65 | +57 | +44 | +47 | +70 | +82 |
| 300-599 | 0 | +40 | +33 | +52 | +43 | +50 | +75 | +100 | +50 | +50 | +89 | +67 | +67 | +70 | +86 |
| 600+ | +30 | -25 | +33 | +61 | +27 | +76 | +67 | +69 | +13 | +73 | +67 | +46 | +84 | +59 | +44 |

* 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

| | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Compared with 12 Months Ago** | | | | | | | | | | | | | | | |
| **New work** | | | | | | | | | | | | | | | |
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | -72 | -81 | -61 | -67 | -74 | -45 | -21 | -15 | -33 | -14 | +2 | -24 | -4 | -8 | -7 |
| England | -73 | -83 | -62 | -70 | -76 | -42 | -17 | -30 | -35 | -14 | -7 | -29 | -4 | -11 | -12 |
| Scotland | -63 | -70 | -64 | -55 | -66 | +62 | -23 | +6 | -21 | -38 | -23 | -29 | -28 | -5 | +2 |
| Wales | -85 | n/a | -50 | -63 | -70 | -56 | -35 | -29 | -52 | -53 | +4 | -73 | +20 | -61 | -86 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | -58 | -71 | -38 | -56 | -51 | -47 | -11 | -9 | -21 | -3 | -13 | -23 | -25 | -9 | -1 |
| 115-299 | -92 | -78 | -64 | -61 | -77 | -42 | -18 | -8 | -26 | -23 | 0 | -38 | -25 | +18 | +13 |
| 300-599 | -67 | -75 | -33 | -48 | -57 | -50 | -50 | +29 | -38 | -63 | +11 | +13 | -33 | -40 | -14 |
| 600+ | -73 | -100 | -85 | -81 | -100 | -45 | -7 | -29 | -40 | 0 | +7 | -37 | +29 | -6 | -15 |
| **R&M** | | | | | | | | | | | | | | | |
| ***By Country*** | | | | | | | | | | | | | | | |
| GB | -61 | -85 | -59 | -56 | -58 | -38 | -11 | -22 | -29 | -15 | +1 | -18 | -4 | -6 | -6 |
| England | -58 | -84 | -62 | -52 | -58 | -34 | -5 | -30 | -22 | -17 | -13 | -25 | 0 | -12 | -19 |
| Scotland | -63 | -79 | -58 | -79 | -57 | -74 | -28 | -7 | -54 | -36 | -16 | -21 | -24 | -5 | +13 |
| Wales | -83 | n/a | -36 | -53 | -57 | -42 | -29 | -13 | -43 | -46 | +24 | -44 | -16 | -38 | -62 |
| ***By Size of Firm*** | | | | | | | | | | | | | | | |
| <115 | -53 | -69 | -29 | -52 | -45 | -43 | -19 | -7 | -13 | 0 | -12 | -16 | -9 | -8 | -3 |
| 115-299 | -87 | -94 | -56 | -62 | -69 | -42 | -18 | -19 | -30 | -26 | -5 | -30 | -14 | +14 | 0 |
| 300-599 | -55 | -100 | -44 | -59 | -32 | -33 | 0 | 0 | -38 | -57 | +25 | +21 | -33 | -29 | 0 |
| 600+ | -57 | -100 | -85 | -54 | -79 | -33 | +7 | -34 | -34 | -8 | +3 | -31 | +18 | -6 | -11 |

Weighted % Balance of Respondents

## 9 Supply of Resources Required

| | Q3 | Q4 | 2010 Q1 | Q2 | Q3 | Q4 | 2011 Q1 | Q2 | Q3 | Q4 | 2012 Q1 | Q2 | Q3 | Q4 | 2013Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Skilled Operatives** | | | | | | | | | | | | | | | |
| GB | 4 | 4 | 8 | 3 | 5 | 3 | 4 | 8 | 7 | 11 | 9 | 8 | 11 | 5 | 8 |
| England | 5 | 0 | 8 | 2 | 5 | 2 | 5 | 10 | 5 | 15 | 8 | 11 | 6 | 5 | 6 |
| Scotland | 2 | 4 | 11 | 5 | 7 | 0 | 3 | 13 | 18 | 0 | 13 | 5 | 10 | 14 | 17 |
| Wales | 0 | n/a | 0 | 0 | 0 | 8 | 0 | 4 | 0 | 0 | 12 | 9 | 35 | 0 | 0 |
| **Other Operatives** | | | | | | | | | | | | | | | |
| GB | 0 | 0 | 5 | 3 | 2 | 1 | 0 | 1 | 0 | 1 | 2 | 6 | 3 | 4 | 10 |
| England | 0 | 0 | 7 | 2 | 2 | 1 | 1 | 1 | 0 | 0 | 0 | 10 | 3 | 7 | 10 |
| Scotland | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 10 | 0 | 6 | 0 | 12 |
| Wales | 0 | n/a | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 14 |
| **Staff** | | | | | | | | | | | | | | | |
| GB | 4 | 14 | 6 | 4 | 1 | 17 | 14 | 16 | 10 | 13 | 11 | 10 | 16 | 4 | 19 |
| England | 1 | 9 | 6 | 5 | 1 | 20 | 19 | 10 | 5 | 19 | 14 | 15 | 13 | 4 | 13 |
| Scotland | 2 | 14 | 7 | 0 | 0 | 0 | 0 | 34 | 41 | 0 | 3 | 5 | 0 | 2 | 28 |
| Wales | 26 | n/a | 0 | 0 | 0 | 8 | 0 | 0 | 0 | 0 | 12 | 0 | 35 | 11 | 0 |
| **Plant** | | | | | | | | | | | | | | | |
| GB | 1 | 0 | 0 | 3 | 2 | 1 | 1 | 2 | 5 | 0 | 3 | 5 | 7 | 3 | 3 |
| England | 1 | 0 | 0 | 1 | 3 | 0 | 1 | 1 | 8 | 1 | 0 | 6 | 12 | 2 | 0 |
| Scotland | 0 | 0 | 0 | 21 | 0 | 0 | 0 | 13 | 0 | 0 | 5 | 0 | 2 | 2 | 10 |
| Wales | 0 | n/a | 0 | 21 | 0 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 22 | 0 |
| **Materials and Products** | | | | | | | | | | | | | | | |
| GB | 0 | 0 | 3 | 1 | 2 | 2 | 1 | 5 | 4 | 3 | 4 | 4 | 8 | 6 | 1 |
| England | 0 | 0 | 1 | 2 | 0 | 1 | 1 | 6 | 7 | 5 | 2 | 7 | 13 | 11 | 1 |
| Scotland | 2 | 0 | 16 | 0 | 10 | 0 | 3 | 16 | 0 | 0 | 3 | 2 | 8 | 0 | 1 |
| Wales | 0 | n/a | 0 | 0 | 0 | 4 | 0 | 4 | 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 2013 Q1 survey totalled 124. 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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