UK Construction Monitor

Q3 2026

ECONOMICS



Headline workloads slip back with housebuilding under particular pressure amid heightened financial concerns

- The headline workloads indicator remains in negative territory for a sixth successive quarter as both the private and public housing activity metrics worsen
- Credit conditions expectations deteriorate sharply, with macro pressures weighing heavily on the outlook
- Infrastructure remains the most resilient sector, with activity again rising in Q3

The Q3 2026 RICS UK Construction Monitor results show the headline workloads indicator slipping back, having stabilised somewhat in the previous quarter. Much of the Q2 improvement in the credit conditions outlook has also unwound, with forward-looking readings deteriorating sharply over the latest survey period. Set against this, infrastructure workloads continue to expand at a solid pace, comfortably remaining the firmest part of the market. Meanwhile, twelve-month workload expectations, at a headline level, were little changed and stayed in modestly positive territory. Cost projections moderated for a second consecutive quarter, although they remain elevated by historical standards. Anecdotal feedback continues to point to planning delays and building safety regulation as the most persistent constraints on delivery.

Headline workloads slip back as housing weakens

The headline workloads indicator registered a net balance of -7% in Q3, compared with -4% in Q2, leaving the series in negative territory for a sixth successive quarter. The softer outturn was concentrated in the housing sector. Private housing remained the weakest segment in terms of momentum behind workloads, with the net balance moving to -18% (from -12%), while public housing workloads turned negative at -6%, following a reading of +1% in Q2.

Private commercial workloads also lost ground, posting a net balance of -10% (compared with -7%), and other public works moderated to +4% (from +9%). Private industrial turned marginally less negative, with the net balance at -7% (from -9%). At a regional level, the North of England was the only area to return a positive reading for the all-sector workloads measure, at +2%. Wales and the South West posted a net balance of -1% (compared with -8%), while Northern Ireland was considerably less negative at -6% (from -23%). London and the South East weakened to -13% (from -7%).

Infrastructure remains the strongest sector

Focusing on the infrastructure segment, the net balance for overall workloads rose to +18% (from +16%), the firmest reading in eight quarters. Water and sewage strengthened notably to +30% (up from +23%), while roads moved higher to a net balance of +12% (compared with +7%). Energy remained the strongest sub-sector, despite moderating slightly to +37% (from +39%). Communications and rail both saw a slight easing in impetus, at +18% (compared with +22%) and +6% (from +10%) respectively. Harbours remained the only infrastructure sub-sector sitting outside expansionary territory, returning a net balance of -1%.

Credit conditions outlook deteriorates again

The credit conditions series saw a marked deterioration in forward-looking readings, reversing much of the improvement reported three months ago. The net balance citing a deterioration over the past three months came in at -27% (compared with -29%). Looking ahead, however, the three-month-ahead reading fell to -36% (from -21%), while the twelve-month-ahead reading moved to -32% (compared with -13%). The scale of the shift suggests respondents have again become more concerned about the financing environment, with anecdotal feedback pointing to the rise in gilt yields through the quarter and the associated increase in the cost of debt.

Financial constraints, as well as planning and regulation, are now cited by a comparable share of respondents, at 62% in each case, with the former referenced by a smaller proportion than in Q2 (66%) and the latter little changed (61%). Respondent feedback continues to highlight the Building Safety Regulator and gateway approval timescales, alongside nutrient neutrality and biodiversity net gain requirements, as persistent sources of delay. Insufficient demand was cited by 41% of respondents (from 43%), while shortages of labour were unchanged at 36%. Competition moderated to 27% (from 34%), and shortages of materials moved to 21% (compared with 25%).

Forward-looking indicators hold broadly steady in positive territory

Twelve-month workload expectations were little changed in Q3, with the headline metric at a net balance of +12% (compared with +13% in Q2), leaving the series in modestly positive territory. The picture across sectors was similarly stable. Twelve-month expectations for private residential workloads stood at +5% (from +6%), while private non-residential expectations produced a net balance of +10% (compared with +11%). Infrastructure continues to anchor the outlook, with the twelve-month expectations net balance at +35% (up from +34%), and remains by some distance the strongest sectoral reading.

Employment expectations firmed marginally, with the net balance at +15% (up from +14%). Profit margin expectations moved slightly lower to -13% (compared with -10%), continuing to point to pressure on margins over the year ahead. Cost projections moderated for a second consecutive quarter. Materials costs are now expected to rise by 6.5%, compared with 6.7% previously, with construction costs at 5.8% (from 6.0%) and tender prices at 5.0% (from 5.2%). Skilled and unskilled labour cost growth expectations were broadly stable at 5.1% and 3.9% respectively.

Key indicators

Chart 1

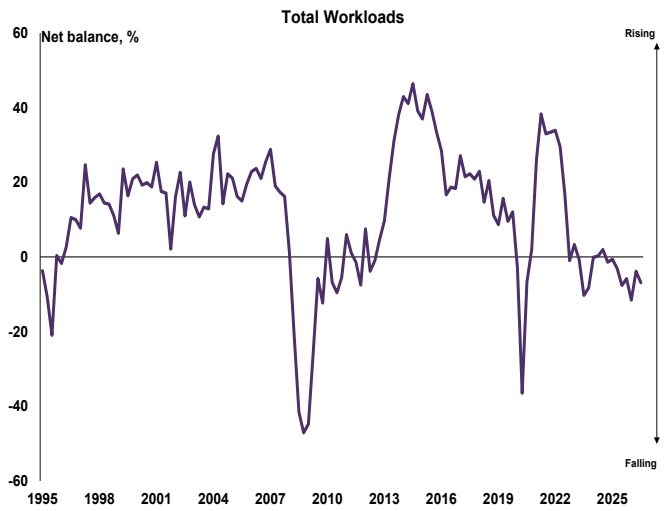


Chart 2



Chart 3

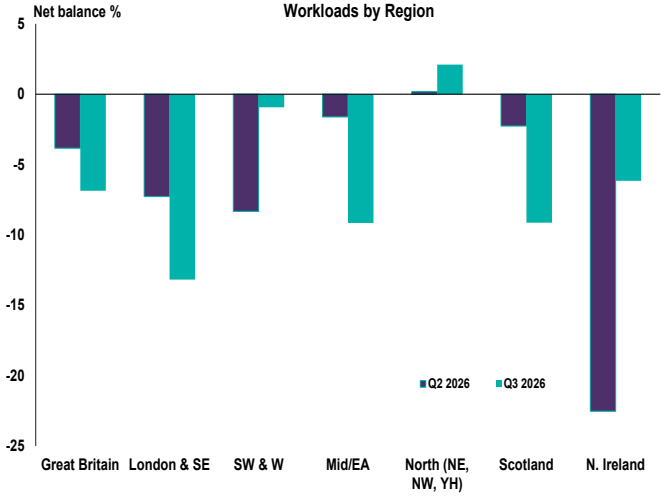


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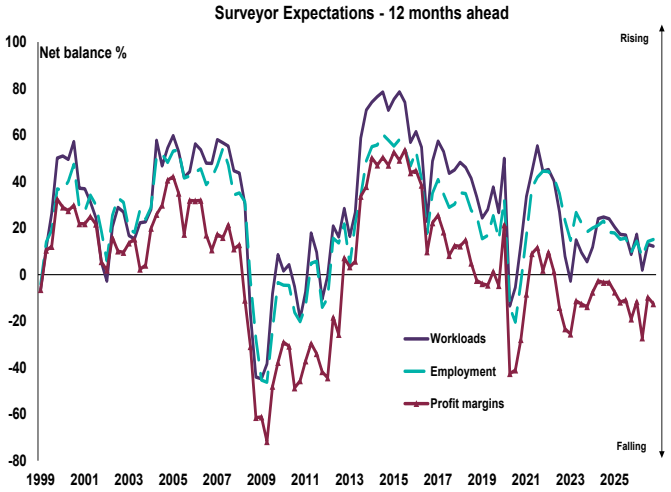


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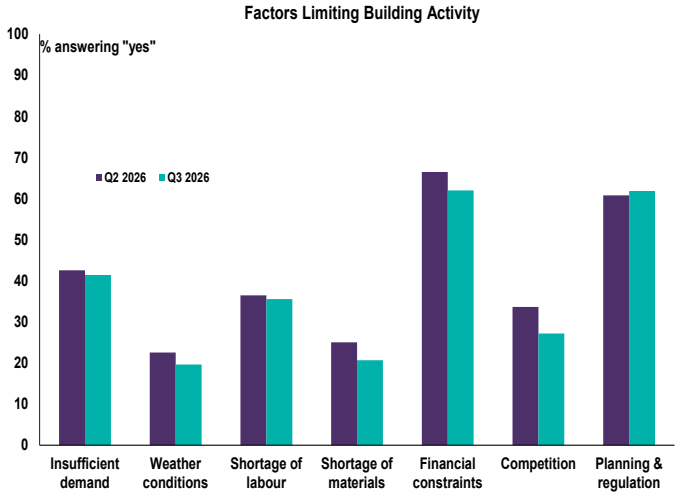
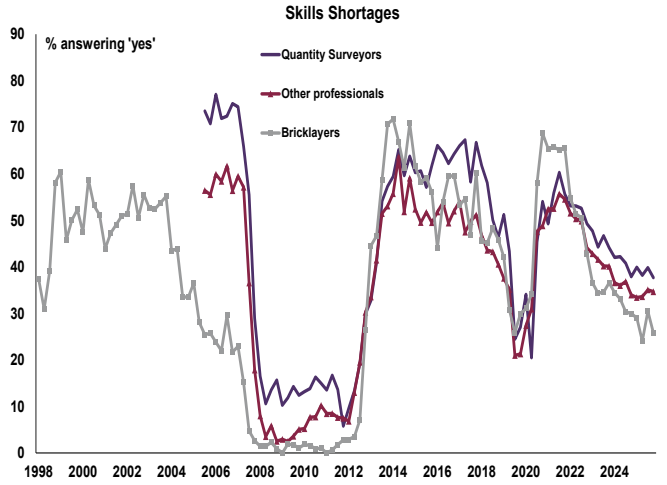


Chart 6



Key indicators

Chart 7

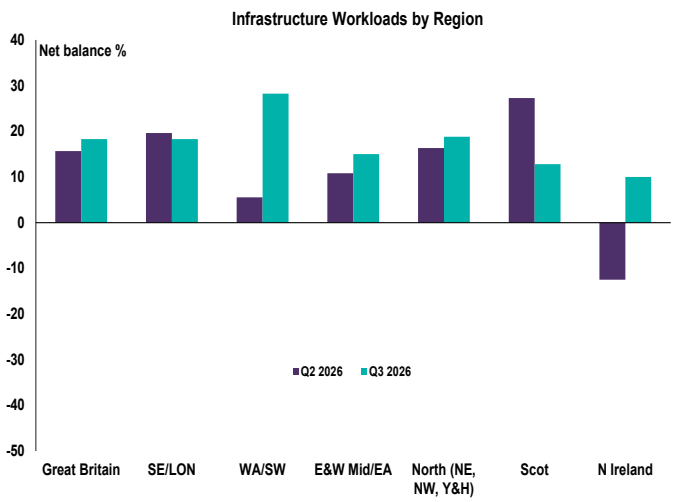


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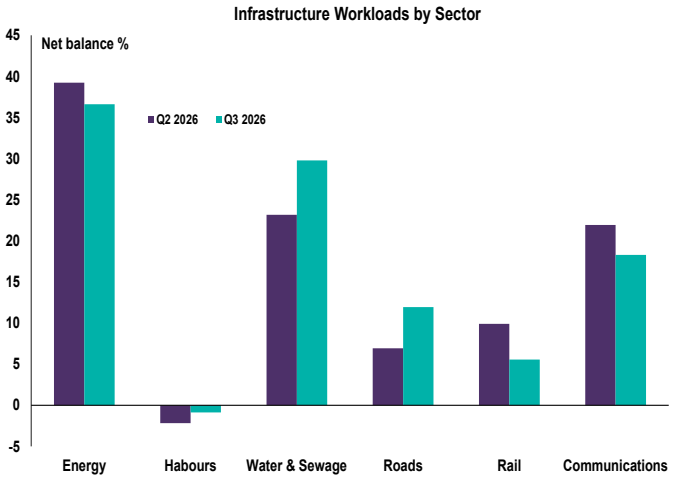


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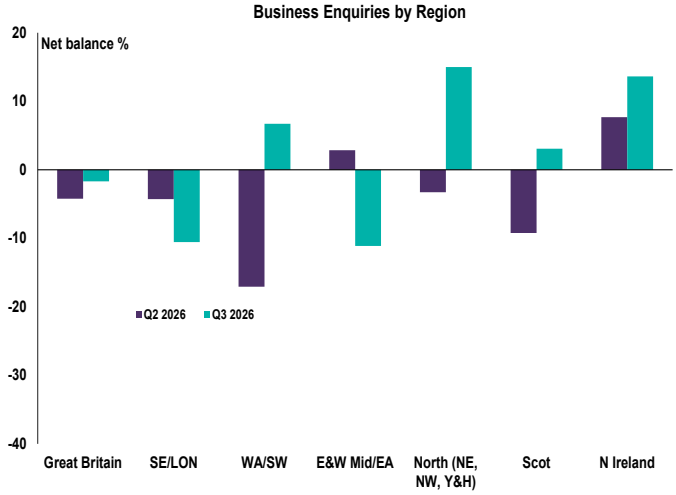


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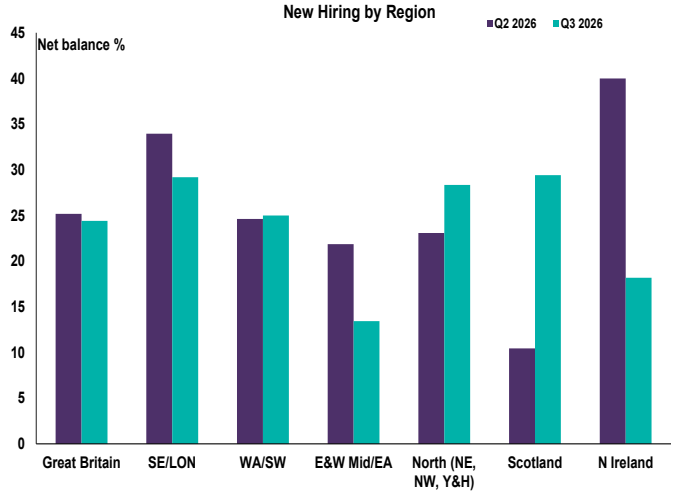
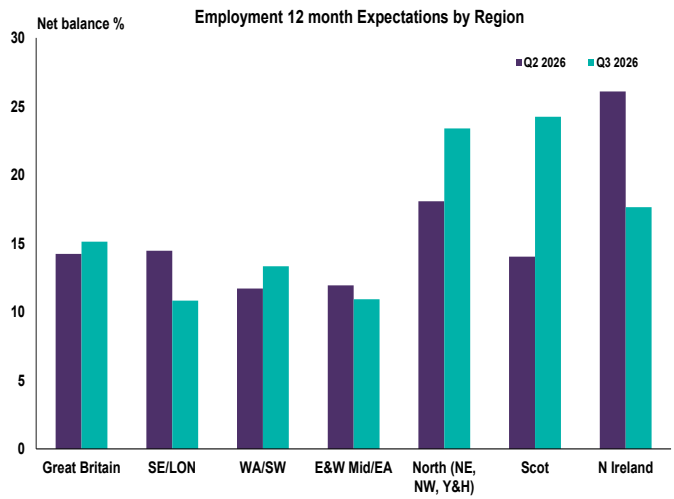


Chart 11



Chart 12



Key indicators

Chart 13

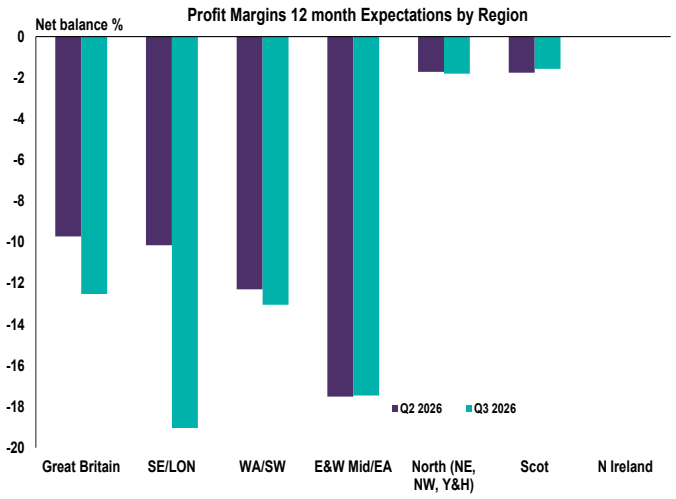
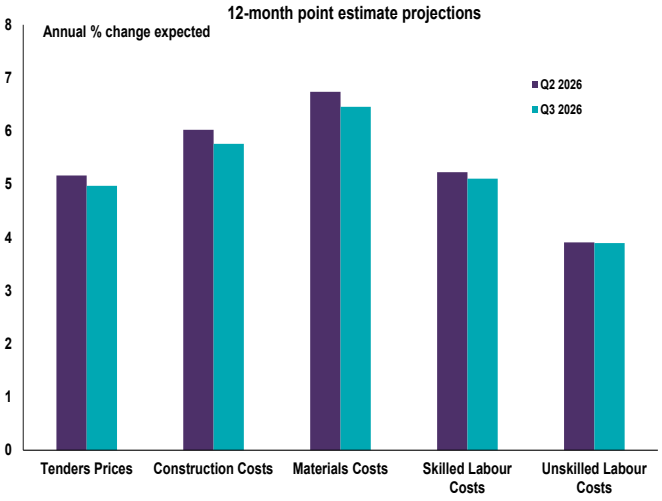


Chart 14



Chartered surveyor market comments

East Anglia

Andrew Clay, Lincoln, Pulse Consult, andrew.clay@pulse.co.uk - No UK-wide infrastructure strategy, and a lack of government steer.

Charles Stimpson, Norwich, Charles Stimpson Chartered Surveyor, charlie_4567@hotmail.com - Planning consent and land availability.

Chris Keeble, Ipswich, Castons Consulting Ltd, Chris.Keeble@castons.arteliagroup.com - Political decision-makers need to show a greater willingness to collaborate on major investment decisions, covering planning, infrastructure, training and local government reviews, to ensure the industry has a mapped-out route to work with.

Clive Richard Tanner, Framlingham, Hollins Architects and Surveyors, clive@hollins.co.uk - Delays in planning, and the associated high cost of BNG, CIL and other levies, are making small housing projects unviable.

Daniel Key, Norwich, Richard Utting Associates LLP, daniel.key@rua.co.uk - The protracted planning system, the difficult financial market and low confidence are directly affecting project commencements.

James Cleaver, Norwich, Andrew Morton Associates Ltd, james@ama-qs.co.uk - AI assistance tools.

Jonathan Nelson, Norwich, Richard Utting Associates LLP, jonathan.nelson@rua.co.uk - Confidence is fragile, but despite the ongoing Middle East conflict, green shoots are visible. Supply chain cash pressures are a key area to watch over the next six months.

Kayleigh Sexton, Norwich, Xentos Consultants Limited, kayleigh-xentosltd@outlook.com - Cost of technology investments.

Maynard Carlile Grout, Norwich, Maynard Grout Associates Limited., mgproperty@mail.com - Lack of client confidence to invest.

Mr R Franklin, Bedford, Robinson & Hall, rjf@robinsonandhall.co.uk - It still remains a very challenging market in both the domestic and commercial sectors.

Saul Humphrey, Norwich, Saul D Humphrey LLP, saul@sauldhumphrey.com - Some good ideas, but little chance of implementation at pace or scale. No confidence, and viability and affordability both lacking.

Stephen M.Parris, Bedford, River Crest Surveyors, steveparris45@gmail.com - Completion of major projects, such as HS2 and the Black Cat roadworks, is releasing manpower.

East Midlands

David Morris, Wellingborough, Tompkins Robinson Surveyors, davidm@tompkinsrobinsonsurveyors.co.uk - A general lack of consistent knowledge of BSA requirements, and an increased emphasis on fire engineering.

Emily Powell, Derby, Wheeldon Brothers Ltd, emily.powell@wheeldon.co.uk - Current political and financial markets are adding additional strain to the construction industry.

Gary Martin, Derby, Keywest Partnership, ghmartin52@hotmail.com - Availability of labour.

James Peel, Northampton, James Peel Consulting Limited, jp@jamespeelconsulting.co.uk - Lack of confidence in the government.

Richard Gudgin, Lincoln, Fox (owmby) LTD, rgudgin@foxowmby.com - As stated on numerous occasions, both national and worldwide economic issues are having a major detrimental effect on our industry. If these issues are not addressed, we run the risk of the industry losing many highly skilled personnel who will be difficult to replace.

Tim Roberts, Market Rasen, Lincoln, John Peberdy Partnership, jpp1971@yahoo.co.uk - Planning requirements, especially biodiversity net gain.

London

Abbas Hussain, London, Valorisca Consulting Ltd, AH.cartier@protonmail.com - Across major UK infrastructure programmes, including the Lower Thames Crossing, Heathrow and HS2, cost uncertainty, supply chain capacity and skilled labour remain key pressures. Client and contractor risk appetite, procurement constraints and programme changes continue to affect tender pricing, budgets and outturn costs.

Adam Udeogba, London, Hackney council, Adamudeogba@googlemail.com - Increased regulation and taxation is likely to affect businesses and reduce the number of available contractors.

Alistair James Goddard, Greater London, AJG Grantchester Associates Ltd, al@grantchester.eu - Specific to my expertise in party wall consultancy, the slow planning process for clients in London has a delayed impact on my instructions and therefore cash flow implications.

Amish Parekh, London, The Bedford Estates Ltd, amish.parekh@bedfordestates.com - More emphasis on energy improvement and EPC ratings on listed buildings.

Mr Andrew Maxwell, London, HAADAM Ltd, admaxwell19@gmail.com - Labour shortages, rising costs and uncertainty around materials and energy continue to affect the local construction market. Clients are increasingly cost-conscious, with greater focus on value, maintenance, compliance and refurbishment rather than major new-build projects.

Christian Pinnigar, London, Spotlight Construction Limited, Christianpinnigar@hotmail.com - The industry is being over-taxed. This is stopping developers, who are in turn stopping projects, and landlords no longer see a profit.

Christopher O'Bryan, London, Abakus, chris.obryan@abakusconsulting.co.uk - BSA, HRBs and the gateway process are holding up projects.

Craig James Bowie, London, Rider Levett Bucknall, craig.bowie@uk.rlb.com - Tendering time against planning agreements, and financial modelling aligning with the cost of borrowing.

Dan Jarvis, London, Gardiner and Theobald LLP, D.jarvis@gardiner.com - World conflicts are creating uncertainty in investment, which is creating negative appraisals and reducing proposed project demand.

Daren Flight, London, ATP Architects + Surveyors Limited, darenf@atpgroup.co.uk - Professional office staff working from home has reduced productivity.

Edward Eborall, London, edward.eborall@lloret.co.uk - Shortage of skilled labour impacting delivery of projects and having a negative commercial impact.

Garreth Norman, London, Complex Claims Intetnational, g_norman@live.co.uk - The effect of energy and petrol prices is feeding through to all costs.

George Martin, London, Ingleton Wood, gmartin1985@hotmail.co.uk - Legislative changes.

Guy Abbott, London, Morguard Building Surveyors, guy@morguard.co.uk - The current government is seen as anti-business, and the policy direction is not conducive to growth.

Henry Wood, London, Acciona Industrial Sa UK Branch, hwood.bec@acciona.com - The construction market in our area continues to be shaped by a combination of financial pressure, planning delays and sector-specific demand shifts. High borrowing costs still influence client decisions, with many schemes reshaped.

Ian Peart, London, Cast Consultancy, Ian.peart@cast-consultancy.com - Green shoots of confidence appear to be surfacing, although caution remains. AI is starting to bed in, with the promise of greater efficiency.

Keith Brampton, Pinner, Keith G Brampton & Associates, brampton.surveyors@outlook.com - Lack of growth in the economy.

Lee Driscoll, London, Rougemont Property Consultants Ltd, lee.driscoll@rouge-mont.com - Net zero targets are having a negative impact on the viability of schemes.

Mark Keith Renshaw, London, H A Newman and Partners Ltd, mark.renshawcqs@gmail.com - Delays in getting fire rating approval for refurbishment of apartments in high-rise blocks, currently 32 weeks.

Martin Bates, London, Martin Bates Consultancy Ltd, martin@martinbates.com - Uncertainty with the government. Nobody knows what is coming next, so we are all operating with one hand tied behind our backs.

Michael Mackie, London, Dragados, mikeymackie@googlemail.com - Market conditions remain mixed. There is a strong forward pipeline of major public sector healthcare and infrastructure work, although procurement remains highly price-sensitive and specialist supply chain capacity is uneven. MEP, facade, structural frame and other technically complex packages continue to be the pressure points.

Michael McDonald, London, Wsp, mmcd0909@outlook.com - Conflicts in the world.

Millan Shaw, London, HG Construction Ltd., millanshaw15@gmail.com - BSR Gateway 2 planning approval is delaying works on site.

Nash Chachona, London, Manna Grato Ltd, nash.chachona@mannagrato.com - Investment in power networks and renewable energy is maintaining strong demand across the sector. Long-lead electrical equipment and competition for experienced technical personnel continue to place pressure on procurement, programme certainty and project delivery costs.

Natalie Hanscombe, London, L&Q, nataliehanscombe@lqgroup.org.uk - Availability of funding and company capacity.

Nigel John Bellamy, London, 8build Limited, n.bellamy@8build.co.uk - Poor economic conditions, a lack of government support and incentives, high energy and borrowing costs, and too much design and build procurement carrying a high risk profile.

Peter Bensted, London, Fenton Associates, peter@fentonassociates.co.uk - The negative impact of the Building Safety Act.

Peter Morley, London, pjm5lt@hotmail.co.uk - Increased cost of finance and lack of confidence in market.

Peter Tasker, London, Adams Chartered Surveyors, info@adamscharteredsurveyors.com - Project coordination and tenders have seen increases in labour and materials, with some contractors not wanting to tender on certain jobs.

Pratik Haria, London, Quants Surveying Services, pratik.haria@outlook.com - A more motivated, coordinated and quick-responding multi-party agreement structure leads to faster delivery, better capital mobilisation and stronger economic growth, because aligned public and private partners unlock investment, reduce delays and create confidence across the entire infrastructure pipeline.

Richard, Random Cubic Projects Ltd, richard@randomcp.com - Planning red tape for commercial projects, and interest rates above 3%, are suppressing the industry.

Richard Ratcliffe, London, St Martins Management Ltd, rratcliffe@smmc.uk.com - Attention to detail and specification, with contractors not delivering precisely what is specified in the employer's requirements. Consultants who do not coordinate their design with our disciplines, and cost consultants who consistently fail to price the project accurately between RIBA stages 2 and 4.

Ryan Purdy, London, Equans UK, ryan.purdy@equans.com - Availability of grid connection is causing major delays.

Sam Smith, London, AtkinsRealis, sam.smith2@atkinsrealis.com - Demand from clients to develop, and red tape around new-builds.

Samuel Odipe, London, Fourteen10 & Associates Ltd, samuel.odipe@fourteen10.co.uk - Planning approvals.

Sharon Maluza, San Francisco, Cumming Group, Sharon.Maluza@cumming-group.com - Infrastructure and utilities investment continues to provide strong workload visibility. Planning delays, skills shortages and ongoing cost inflation remain key challenges. Greater certainty around public investment pipelines would support recruitment, productivity and long-term sector growth.

Stephen Dzugwahi, London, Places for London, infobeu@yahoo.co.uk - Demand and affordability.

Steve Home, London, Crest Nicholson Operations Limited, steve.home@crestnicholson.com - Improving quality, so that tasks are only carried out once.

Stuart Birrell, London, Murray Birrell, stuart@murraybirrell.co.uk - Uncertainty in the wider economy, and government inaction and changes of direction.

Tim Cock, London, Pillar Development and Project Management Ltd, tim.c@pillarconsulting.com - As previously: macro conditions and regulation, including the BSR.

Tom Briercliffe, London, Gauge & Compass Ltd, tom.briercliffe@gaugecompass.com - Uncertainty has the biggest impact. A changing political landscape, interest rate movements, and procurement routes embedded in distrust and with onerous contracts. This is all resulting in pre-construction periods longer than construction, and excessive risk priced throughout the supply chain.

Tom Doubleday, London, tjbdoubleday@gmail.com - Appetite to spend and seasonality of the sector.

Wesley Swanepoel, London, swanepoelwes@gmail.com - Regulation continues to be the single most obstructive element in delivering affordable construction solutions.

North East

Brian Bainbridge, Teesside, Balfour Beatty Limited, brian.bainbridge@balfourbeatty.com - Working on a first-of-a-kind project, so transferable skills are a specific factor.

Ian Clift, Gateshead, Brims Construction LTD, iclift@brimsconstruction.com - Change to local government has put capital expenditure on hold for review, alongside total uncertainty over the direction of national government.

John Prentice, Warrington, Amentum, John.Prentice@global.amentum.com - Infrastructure development depends on government backing.

Neil Proctor, Durham, DRC Consulting (NE) Limited, neil.proctor@drc-consulting.co.uk - Reliance on public finances and local council spending, which may be reducing.

Peter Carruthers, Newcastle Upon Tyne, Paragon Construction Consultants, paragon-consult@outlook.com - Obtaining planning consent remains the single biggest drag on programme, often adding six months or more beyond programme due to slow planning authority responses. Rising gilt yields are also pushing up the cost of debt, squeezing project viability on schemes already tight on margin.

Tony Jacob, Northumberland, Qts, tonyj.jacob@q.com - I work in a sector of the industry that designs and delivers data centres, which is a huge and growing sector.

North West

Andrew Fisher, Wallasey, M&b, andyf637@aol.com - Health and safety rules, and high-rise building issues.

Andrew Simpson, Manchester, Co-ordinate Ltd, andrew.simpson@co-ordinate-uk.co.uk - Workload is generally down on the previous year.

Barry Winterbottom, Manchester, Plans Drawn, Bawinterbottom@aol.com - Cost of living.

Brian John Boys, Rossendale, B&E Boys Limited, john.boys@beboys.co.uk - The effect of further material increases appears to have waned and costs are more predictable. There is an increased occurrence of market testing with bids that do not then go to site, which suggests that clients have not yet got the confidence or budgets to proceed.

Callum Jackson, Manchester, Renaker Build Ltd, callumjackson@renaker.com - We have had projects held up from starting over the last twelve months due to the BSR.

Clare Nolan-Barnes, Blackpool, Blackpool Council, Clare.nolan-barnes@blackpool.gov.uk - A lack of coastal engineering professionals, and unclear consenting rules in coastal areas of infrastructure.

Connor Harland, Liverpool, connor.harland@sovini.co.uk - Planning, and the end of the five-year cycle for Homes England.

David Burn, Carlisle, Cubby Group, david.burn@cubbygroup.co.uk - Continuity of work.

Delwyn Jones, Liverpool / Manchester, Rheith Limited, djones@rheith.co.uk - Constrained availability of skilled, experienced individuals across related professions and trades.

Eddie Lea, Crewe, Eddie Lea, eddie.lea@sky.com - Confusion regarding BSA.

Gregg Vincent Iredale, Liverpool, IF Building Consultancy Ltd, gregg.iredale@ifbuildingconsultancy.com - Private sector decreasing.

Isabelle Roberts, Merseyside, Caddick, isabelleroberts@caddick.co.uk - The impact of new building regulations and planning requirements, and the difficulties in getting projects through gateway.

Jez Manley, All region, Greene king, jezmanley@yahoo.com - Changes to the Fire Act.

Jonathan Smith, Sellafield, Lindner Interiors Limited, jonathan7264@gmail.com - Design issues with the client's design team cause delays to the start and completion of projects.

Kevin King, Liverpool City Region, St Helens Council, kevinking@sthelens.gov.uk - Tender prices notably higher over the last few months.

Leslie Millar, Douglas Isle of Man, Leslie Millar MRICS FCIOB FASI, les.millar@hotmail.co.uk - Construction industry on the Isle of Man is busy.

Luke Flintoff, Preston, Lancashire County Council, lj30@live.co.uk - Adverse weather conditions. It was too hot, and now there is too much rain.

Luke Wallwork, Nelson, Lancashire, Protec Fire Detection PLC, luke.wallwork@protec.co.uk - We are a specialist subcontractor. Over the last eighteen months we have seen a significant increase in final account erosion by our clients, the main contractors, with difficulty in addressing the matters used to reduce our account value.

Mark Murphy, Manchester, Egerton, mark@egertonhomes.co.uk - Availability of skilled professionals and managers.

Martyn James Parry, Lancashire, Northern Trust Company Limited, martynparry@northerntrust.co.uk - Mainly planning delays.

Mary-ann Atem Ebako Manje, Stockport, Integrum Power Engineering- OCU Group, maryannmanje@gmail.com - Technical know-how of skilled workers.

Merryn Stoyle, Warrington, stoylemerryn@gmail.com - Customers unwilling to invest.

Michael Brown, Bolton, The Surveying Experts, michael.brown@thesurveyingexperts.com - The cost of borrowing is still too expensive and is stifling growth for many businesses.

Michael Small, Bolton, Connolly Ltd, michael.small@connollyltd.co.uk - General shortage of labour.

Mike Hyde, Wigan, Truline Construction & Interior Services Ltd, mikehyde@truline-cis.co.uk - Geopolitical uncertainty and rising material and energy costs continue to delay investment and project approvals. Clients remain cautious, with affordability pressures leading to programme slippage, value engineering, reduced scopes and deferred projects.

Nick Wdowczyk MRICS, Manchester, GWB Consultants, nwdowczyk@gwbconsultants.co.uk - Still challenges with viability in the market, because of continually rising material and labour costs.

Otumiseng Malebye, Preston, Volkerstevin, Otumiseng.malebye@volkerstevin.co.uk - The Middle East conflict is affecting fuel prices, which has a ripple effect on the cost and supply of materials.

Paul Ogolo, Liverpool, Paul Ogolo, paulogolo1@googlemail.com - The factors affecting the local construction market are a lack of training and knowledge in ever-changing construction processes, including existing ones such as steel erection, alongside rising costs and planning strategic frameworks.

Paul Roberts, Bootle, Cunliffes Ltd, paul.roberts@cunliffes.com - Availability of small builders to complete small works.

Philip Spendlow, Stockport, P G SPENDLOW Construction Cost Consultant, spendlowphilip6@gmail.com - The lack of well-coordinated tender and construction documentation has been noticeable on recent projects. There also appears to be a disconnect between the employer's aspirations and the reported budget, resulting in time-consuming value engineering.

Richard Woolfall, Liverpool, Nugent Care, richardwoolfall@hotmail.co.uk - Evolving sector regulation.

Robert Fallon, Liverpool, University Hospitals Liverpool, robert1.fallon@outlook.com - General higher costs experienced in recent years are expected to continue on an upward trend.

Robert Tyrer, Uk wide, T J Morris, robert.tyrer@tjmorris.co.uk - Planning.

Siu Cheong Chan, Manchester, Yokogawa, siucheongchan@msn.com - Lack of government funding, and reluctance to invest in infrastructure that is not compliant with current standards.

Northern Ireland

Daniel Cook, Derry, Kilrock Limited, daniel@kilrockltd.com - Companies taking projects on at low margins as loss leaders, or to keep staff busy. This lowers overall client expectations on actual prices for works over the medium and longer term.

Joseph Green, Belfast, J Green Chartered Quantity Surveyors, info@jgreenqs.com - Shortage of skilled labour.

Kevin Dougall, Belfast, Esc Construction Consultants, kevin.dougall@escconsult.co.uk - Increasing use of AI is improving productivity and the quality of services provided.

Marius Martin Blake, Belfast, Marius Blake Associates, marius@mariusblakeassociates.com - The biggest impact is a lack of construction labour restricting projects.

Michael O'Donnell, Belfast, Belfast City Council, odonnellmichael@belfastcity.gov.uk - Procurement and tendering processes.

pat Conlon, Rural across NI, pat.conlon@midulstercouncil.org - Availability of building surveyors is an issue in Northern Ireland.

Richard Collins, Omagh, Collins Deisgn, info@collinsdesignni.co.uk - Local planning policies emanating from the Climate Change Act 2008 are now beginning to have a detrimental effect on the viability of future projects.

Sean Stewart, Dungannon, Stewart Consulting, info@stewartconsulting.eu - The proximity to the Dublin market, where demand is high, means that skilled resource is drained into that location to the detriment of the local and Northern Ireland market.

Scotland

Amcgregor, Glasgow, ailsamcgrgor@outlook.com - Delays in planning and decision-making are delaying the progress of projects and affecting the supply chain and manufacturing process.

Chris Grant, Edinburgh, Carey Group, chris.grant@careys.co - The industry is still suffering from out-of-date cost advice to clients.

Chris Marshall, Glenrothes, Lundin Homes ltd, Chris.marshall@lundinhomes.com - As a private house builder and developer, we have reduced our own developments and noticed a reduction in enquiries from other developers that we normally undertake work for.

Gary Logue, Glasgow, Bellrock, gary.logue@bellrock.co.uk - Softening market.

Gordon Smith, Irvine, Gordon Smith FRICS, gordonsmith0408@outlook.com - The Planning process.

Ian Dunning, Edinburgh, Infrastructure Managers Ltd, ian.dunning@iml-uk.com - Bureaucracy. There is too much of it, making the UK uncompetitive compared with other countries.

John Murray, Glasgow, Tri-Square Construction Solutions Ltd, john.murray@tri-square.uk.com - A lack of design at the front end of our projects is leading to frequent reworking of the zones we construct. We build to keep track with programme commitments and then discover later that design changes will affect constructed works.

Mrs Kayleigh Keenan, Glasgow, kayleighrkeenan@gmail.com - Larger sites willing to pay more are stripping our labour pool.

Kenny Telfer, Edinburgh, Tantallon Projects, kenny@tantallonprojects.com - Improvements to enquiry levels over the last three months have brought about steady business growth.

Kieran McKenna, Glasgow, Doig+Smith, kmckenna@doigandsmith.co.uk - Ongoing conflict in the Middle East and Eastern Europe.

Kinlay Laidlaw, Near Ayr, Laidlaw Associates Building Surveying Ltd, mail@laidlawsurveying.com - A lack of access to training and the poor quality of training available, alongside a decline in interest in the construction industry and building surveying, is likely to contribute to the continued decline in skilled and experienced craft skills and professional skills across surveying and architecture.

Marcus Fielder, Edinburgh, T&t, marcusfielder@yahoo.com - High defence spending.

Neil Bremner Robertson, Glasgow, N/a, neilrobertson1314@live.co.uk - Labour Government slowing down growth and investment.

Pervez Khan, Glasgow, South Lanarkshire Council, pervez.khan80@yahoo.com - Inflation and political stability. Petrol prices have gone up as a result of the Middle East conflict, and utility prices have risen as a result of the conflict in Eastern Europe.

Steven Hyde, Edinburgh, D Blake & Co Ltd, steven.hyde@dblake.co.uk - Demand remains subdued, apart from private work (typically domestic extensions and alterations).

Stuart Dennett, Glasgow, Ailsa TH Ltd, s.dennett@ailsa-th.com - Delay with statutory authority consents.

Glasgow, kennethmcneil@sky.com - Poor or incomplete information from design teams leading to iterative changes multiple times costing time and expense to all parties in the project delivery.

South East

Alan Vincent, Bexhill-on-Sea, Vincent Consult Limited, alan.vincent@vincentconsult.co.uk - Slow growth in private housing, due to houses not selling, linked to uncertainty in government policy.

Andrew Bellis, London, Dartford, Guildford, Oxford, Reading, Swindon, Thames Water Utilities Ltd, andrew.bellis@thameswater.co.uk - Poor credit rating, red tape with highway and transport authorities, and negative media coverage, especially around water leaks, pollution incidents and management pay and bonuses.

Andrew Grimes, London, Grimes Limited, andrewgrimes@grimeslimited.co.uk - Increasing percentage of earned hours.

Andrew Page, Ascot, Dhp (uk) LLP, ANDREW.PAGE@DHPUK.CO.UK - Government instability.

Charles Dawson, Rye, Dawson and Assoiates, enq@dawsonsurveyors.com - Planning and bureaucracy.

Chris Barber, London, Howard Barber Associates Limited, chris.hbaltd@gmail.com - Dealing with planning and planning conditions has become more complicated for new development works.

Chris LeRoy, Reigate, Ridge Design, chrisleroy202@gmail.com - Long-term financial uncertainty.

Christopher Hobbs, Taylor Hobbs, taylorhobbs@btconnect.com - Anecdotal evidence of a lack of confidence ahead of fiscal certainty. Some consented projects are on hold, possibly reflecting land banking or developer overstretch.

Clive Tatlock, Guildford, CTA surveyors, clive@ctasurveyors.com - A lack of practical green policies that can be realistically undertaken.

Colin Townsend Green, London, CTG Construction Managmeent, colintg@ctgcm.co.uk - There is a lot more scrutiny over costs and performance to meet budgets. Delays are occurring, leading to greater costs required by pre-planning and new legislation.

Colin Hulott, Sheerness, Abstrkt-Dsign, colinhulott@abstrkt-dsign.co.uk - Ongoing general over-regulation across all sectors, unsustainable planning expectations, heightened fears over economic uncertainty and rapidly escalating material costs.

Darshana Fernando, Colombo, Delmage Forsyth Co Ltd, darshana.lifestyle@delmege.com - Quality level of the material.

Derek Mynott, Bedford, Mynott Associates Limited, derek.mynott@mynottlimited.co.uk - The use of artificial intelligence.

Mr I R minty, London, Barton Minty Limited, ian@bartonminty.co.uk - Impact of current US policy direction on geopolitics, alongside the Middle East conflict.

Iain Roberts, London, Steam PM, iroberts@steam-pm.com - Use of AI as a research tool is helping with productivity.

Ian Thomson, KIngs Langley, Hertfordshire, ian Thomson & Co Limited, ian@ianthomsonandcompany.co.uk - Increasing skilled workforce.

John Howse, London, John Howse & Associates, johnhowse@hotmail.co.uk - Regulation and compliance, combined with fiscal policy, is causing stagnation and affecting investment returns. Planning policy is as tight as ever. This is set against a lack of growth and limited active resources affecting policy. We are all waiting for the budget, which will again focus on taxing those who deliver.

John Rackham, Winchester, Teg Down surveys, john.rackham@outlook.com - Shortage of highly skilled specialist staff.

Jonathan Fern, Southampton, Azorian Construction Management, jonathan_fern@btinternet.com - Subcontractors are becoming more contractual, and client payment frequencies are getting worse. Private practice quantity surveyors are more out of touch with the real world than ever before.

Julian Stokes, Reading, Julian Stokes Management, julian@jsmonline.co.uk - Budget uncertainty is again affecting the second half of the year.

Keiran Page, Sussex, PAGE Property Consultants, keiran@page-property.com - The BSA role is not defined for smaller works and projects.

Keith Robert Hammond., Ashford, Keith R Hammond Limited. Chartered Surveyors., krhammondltd@btinternet.com - No confidence in improvement in the economy.

Keith Sanger, Lymington/Southampton, Keith Sanger Associates Ltd, keith@sanger.co.uk - Lack of staff in fire regulation authorities.

Kenneth Stewart Lomas, East London, UpsdalesProperty Management Ltd, Kenslomas@gmail.com - Client caution reflecting cost against profit.

Kye Minter, Brighton, F.B.Ellmer Ltd, kyeminter2@gmail.com - Lack of use and take-up of the construction software available to automate processes.

Lance laband, Bedford, GHG solutions, laband66@hotmail.com - Unprecedented increase in workflow due to the dry, hot summer.

Martin Spicer Consultancy, Witney, Martin Spicer Consultancy, martinspicerconsultancy@gmail.com - Dry weather will create a surge in insurance claims and demand in the repair and maintenance market.

Michael Lilford, Canterbury, Price Lilford Building Surveyors, mike@pricelilford.co.uk - Use of AI in report production is having a significant impact.

Oliver Kannemeyer, Godalming, Drake & Kannemeyer LLP, o.kannemeyer@dkgroup.co.uk - Procurement and frameworks affect smaller firms more than larger firms.

Oliver Streeting, Canterbury, Pricelilford, olliestreeting@gmail.com - There are many trades around, but finding good quality tradesmen is the challenge.

Patrick Furlong, London, QSAcc Services Limited, pfurlong@qsacc.co.uk - Planning regulations need to be addressed in order to speed up the whole construction industry.

Paul Dean, Watford, Langley Construction Consultants Ltd, paul@langleyconstructionconsultants.co.uk - Planning constraints, lack of available credit, and high construction costs reducing workload.

Paul Mr Denny, Colchester, Potter Raper ltd, paul.denny@potterraper.co.uk - A lack of private housebuilding, due to a lack of profitability.

Paul Hands-Wicks, London, J.P.Jelly & Partners, paul@jpjelly.co.uk - Difficulties in meeting funding partners' contractual requirements, dealing with the BSR, and dealing with claims-focused contractors.

Phil Pike, newport IOW, Pikes Limited, Philip@pikesltd.co.uk - Frameworks are anti-competitive and anti-productivity, and should be removed from all procurement routes.

Richard Bell, Whitstable, Chapter 4 Limited, richard@chapter-4.co.uk - Nutrient neutrality issues are stopping new developments being awarded planning permission across a very large area.

Richard Petterson, London, Rpqs, rpetterson@rpqs.co.uk - Lack of confidence, Planning delays and regulation are all contributing to a slow and cautious market.

Rob White, London, Civil Service, rob.white22@icloud.com - BNG and UGF.

Robert Desbruslais, London, Desbruslais Chartered Surveyors, robert@desbruslais.co.uk - Fall in property values against increased construction costs is rendering a greater number of potential projects unviable.

Robert A Mitchell, Maldon, Robert AA Mitchell, ramitchell060@gmail.com - The market is relatively quiet, and the ongoing global problems in the Middle East alongside the current US policy direction will slow any possible improvements.

Robin Goddard, Dorking, BPG Architects + Surveyors, robin.goddard@bpg.co.uk - The impact of the Building Safety Regulator on major projects.

Robin Muggeridge, Brighton, RBC Surveyors, info@rbcsurveyors.co.uk - Uncertainty.

Scott Jagdeo, Guildford, Guildford Borough Council, scott.jagdeo@guildford.gov.uk - Local authorities are struggling with financial constraints, with many effectively going bankrupt. Consequently, local authorities are investing less in construction and property, and focusing on essential services only.

Mr Stephen (Steve) Frizell, Leatherhead, Frazer Contract Services Ltd, frizell.steve@gmail.com - The absence of the Defence Investment Plan and the next SDSR.

Terry Murphy, Reading, Ionic Consultancy, tm@ionic-consultancy.co.uk - Planning delays and increased legislation.

Tito Fasheyitan, Westerham, Construction Economist Group Limited, info@ceglimited.co.uk - London and the South East remain relatively resilient, particularly in high-end residential and refurbishment. Labour and material costs remain elevated, with skilled trades attracting premium rates. Clients remain cost-conscious, increasing the focus on value engineering and cost certainty.

William Cross, Brighton, Cross Group, will_cross@icloud.com - Poor communication and delays with building control and planning departments.

Brighton, shanebramley@effefftee.co.uk - Local authority / client budgets.

South West

Aaron Hodson, Exeter, Hurley & Co, aaron@hurleyco.co.uk - Trade labour shortages.

Adam David Collins, Bristol, Dalkia, adamdavidcollins316@gmail.com - I believe multiple large projects in the South West are affecting the hiring process, as such high demand for skilled workers is leading to more competition and cost.

Adam Tongue, Bath, Western Building Consultants, adam.tongue@westernbuildingconsultants.co.uk - Increasing and variable mortgage rates.

Andy Cottrell, Oxford, Ridge & Partners LLP, andycottrell@ridge.co.uk - Global issues directly or indirectly affecting the UK construction market reinforce the importance of collaboration and early engagement across key client, consultant and supply chain stakeholders.

Chris Workman, Salisbury, Dadson and Butler, chris@dadsonandbutler.co.uk - Planning, and particularly ecology, is always an issue.

David P. Hunt, Great Tew, Johnston Estate Management Group Ltd, dh@jemg.co.uk - Long supply lead-in times from specialist suppliers, and the supply of skilled labour.

David Partridge, Taunton, Summerfield Developments, dpartridge@summerfield.co.uk - We continue to see a depressed property market due to ongoing uncertainty regarding the cost of living, inflation, and continuing changes to government planning and budget legislation.

David Perry, Redruth, Wm G Weller & Son Ltd, david@wmweller.co.uk - Uncertainty remains in construction costs, and confidence in government policy and direction is still a challenge for investment and committing to capital projects.

Douglas Cawley, Cornwall, Douglas Cawly & Associates, info@cawleyassociates.co.uk - Rising material and fuel costs, alongside higher employment costs.

Emma Turner, Weymouth, Turner Associates Survey & Design Limited, emma@turnerassociates.org.uk - Availability of contracting firms able to return competitive tenders.

Howard Peter Johnson, Exeter, I Civils Limited, howard@icivils.co.uk - A great amount of uncertainty in relation to construction costs, and concern that projects may not proceed, and that if they do there will be an unwillingness among clients to pay increases.

Jake Wright, Salisbury, Dadson and Butler, jake@dadsonandbutler.co.uk - Ecology constraints.

James Evans, Swindon, Network Rail, james.evans@networkrail.co.uk - The transition towards GBR is leading to direct headcount reduction, agency backfill of those roles, and the same or an increased level of works, affected only by overall funding availability.

John Murrin, Exeter, Bromhead and Chard Limited, john.murrin@bromheadandchard.co.uk - People do not feel confident about the economy, the government or the future.

John Neil Shepherd, Guernsey, Wt, john.shepherd@wtpartnership.com - Restrictive labour market.

Jonathan Charles, Barnstaple, Stroma Building Control, jonathan.charles@stromabc.com - Downturn in the housing market, and the cost of fuel and consumer products.

Julia de bretton Gordon, Salisbury, Fowler Fortescue, Jdb@fowlerfortescue.co.uk - High wage costs and building costs, plus interest rates and an unresponsive planning system, mean that projects have been cancelled.

Keith Parry, Bristol, Elm Associates Ltd, keith@elmsurveyors.com - Utility companies requesting the wrong information, due to a lack of staff who understand what is actually being requested, and issuing inappropriate documents for completion.

Martin Smalley, Bristol, Gleeds LLP, martin.smalley@gleeds.com - Political change, high interest rates preventing private development, slow planning regime, political will.

Matt Brooks, Guernsey, Channel Islands, Geomarine Ltd, matt.brooks@geomarine.gg - Potential introduction of GST, and ongoing public sector procurement issues.

Myles Joseph Kenneth Clough, Exeter, Myles Clough Management Services Limited, myles@cloughmanagement.co.uk - There remains insufficient resource within local council planning departments to manage the planning application workload and respond within agreed timescales, and this continues to hold up construction projects.

Mr Paul Murray, Exeter, PMKMLtd, pmkmltd@gmail.com - Too many statutory regulations.

Phil Lewis, Exeter, Randall Simmonds LLP, phil.lewis@randallsimmonds.co.uk - Significant increase in affordable housing transfer as large housebuilders struggle to sell stock.

Pym Westrik, Gloucester, Galliford Try, p.westrik1@gmail.com - Working with, and relying on, third parties seems to be an issue, for example working with utilities companies and obtaining permissions to access land.

Richard Jarman, Exeter, Jarman Ward Limited, richard@jarmanward.com - The cost of hiring and the high tax regime both remain a significant barrier to growth. Another factor worth mentioning is the disproportionate award of public sector contracts in favour of larger, sometimes multinational consultancies over more local SME consultancies, and this remains a concern.

Sarah Jane McQuatt, Bristol, Alliance Homes, sarah.mcquatt@alliancehomes.org.uk - Government funding through the SAHP.

W P Howard, Bristol, W P Howard, williamphoward@btinternet.com - Corruption in local authority building control.

Wales

Gareth Harris, Cardiff, Strongs, gareth.harris@strongs-cqs.co.uk - Poor coordination and response time from statutory bodies.

Gethin Davies, Cardiff, D & C Professional Services Ltd, gethin.davies@dcpsltd.co.uk - Requirements of the Building Safety Act 2022 coming into force in Wales will elongate programmes, with inevitable delays while processes are refined.

Glen Grafton Maggs, Swansea, Scp Construction Cost Consultants LTD, glen@scpqs.co.uk - Delays due to planning, SAB and marine SACs.

Jason Hyett, Cardiff, Rightacres Property Co Ltd, jason@rightacresproperty.com - There is a danger of change creating an industry that is full of managers rather than delivery people, and where paperwork and data are produced for their own sake.

Lawrence Jones, Caernarfon, Ljwj22@gmail.com - Companies buying work just to achieve turnover. There is then not enough money in the bill of quantities to employ skilled workers, leading to poor standards and quality.

Mr Lewis T Morgan, Abergavenny, Morgan and Horowskyj, jlmorgan178@gmail.com - Conflicts in the world.

Neil Taylor, Swansea, Codi Group, neil.taylor@codigroup.co.uk - The development process is delaying productivity, primarily the planning system and specifically nitrates in west Wales. This is being compounded within the RSL sector by a shortage of contractors for medium to large schemes.

Robert Davies, Pembrokeshire, Penfro Consultancy Limited, robert.davies@penfroconsultancy.co.uk - All planning applications for new dwellings are currently on hold due to phosphate levels within the river and estuary. This is having an impact on professional practices, developers, construction companies and their supply chains.

Robert Neal, Bristol, National Grid Electricity Transmission, rob.neal@nationalgrid.com - Long-lead plant items, switchgear and the like.

Robert Williams, Cardiff, Lancer Scott Construction West Limited, accounts@mestyn.co.uk - BSR regulator sign-off.

Miss Sharon Matthews, Merthyr Tydfil, Merthyr Valleys Homes, sharon.matthews1@hotmail.co.uk - Lack of qualified people.

West Midlands

Colin S Birks, Hereford, C S Birks Associates, colin@csbirks.co.uk - Lack of skilled labour in maintenance.

Fergus Thompson-Yates, National, Ncs Pcl, fergusthompsonyates@ncspcl.com - Continued financial uncertainty, and the impact of HS2 on the supply chain, are both very negative.

Garrie Weatherley, Birmingham, Trinity Property Consultants Ltd, gjw@trinitypc.co.uk - Remaining concerns over the cost of fuel, and the risk of further increases affecting market appetite.

Mark Adrian Collinge, Stratford upon avon, cfqs Limited, mark@cfqs.co.uk - Awaiting further releases of projects from the Cladding Safety Scheme.

Mark David Freeman, Birmingham, Turner & Townsend UK Ltd, mark.freeman@turntown.co.uk - Wildly fluctuating and increasing fuel costs.

Michael Roach, Tamworth, Roach Hunt Limited, michaelroach@roachhunt.co.uk - Planning is still a problem, with the period from submission to determination too long.

Paul Goffin, Warwick, EstateAide Consulting Ltd, paul.goffin1964@gmail.com - HS2 and Brexit.

Phil Richardson, Birmingham, Gateway Commercial Services Ltd, phil@gatewaycommercial.co.uk - Excessive procurement duration in a highly over-regulated and risk-averse public sector that only suits large players, with SMEs confined to lower tiers while the larger players make money from those tiers. It has driven cost up in every sector.

Philip Hodges, Redditch, Ridgeways Surveyors Limited, phil@ridgewaysqs.co.uk - Caution from developers due to potential increases in interest rates and continued difficulties in the planning process. High-end residential is still surprisingly buoyant.

Richard Miller, Solihull, Spitfire Homes, richard.miller@spitfirehomes.co.uk - Backlog in the planning system, due to a lack of resources to deal with the volume of new applications resulting from changes to the NPPF in December 2024.

Robert Mole, Birmingham, Network Rail, Rob.Mole@networkrail.co.uk - A lack of government funding in rail has resulted in a downturn in investment and a reduction in projects and people. Delayed delivery and overspend on HS2 has also meant interfacing projects are paused, resulting in staff reductions.

Tony Milner, Droitwich, Weatheroak Projects Limited, tony.milner34@gmail.com - Increased employer costs, and continued issues with the planning process.

Marson Ham Ltd, Simon@marsonham.co.uk - Changes to employment law have caused a recruitment freeze, particularly among small businesses, and this has affected the ability to meet demand. Coupled with spiralling fuel costs, which mean firms are turning down or dropping out of work involving travel, a definite contraction is taking place.

Yorkshire & the Humber

Alex Bennett, Leeds, Reventon Limited, alex.bennett@reventon.co.uk - Route to market for clients to engage SMEs in the public sector, despite most being pro-SME.

Andrew Gaunt, Leeds, Bwa, andrew.gaunt@bwa.uk.net - Delays in the planning process continue to be a major issue in progressing projects. Delays in statutory incoming new services to site are also out of control and happen consistently.

Building Control Partnership Ltd, Beverley, Hull, Same as above, gh@building-control.com - Lack of Level 2 registered building inspectors.

David Titterton, Sheffield, Mascot Management, david@mascotmanagement.co.uk - Government economic policy.

Gareth Wilson, Huddersfield, Kirklees Metropolian District Council, g.wilson53@hotmail.com - Political change and local authority budgets.

Ian Tomlinson, Leeds, Rex Procter and Partners, i.tomlinson@rpp.co.uk - Increased social housing activity is welcomed, but for commercial property borrowing costs remain challenging. It is a good time to take projects to market as contractors are keen to secure future workload.

Jason Praill, Leeds, Unify Projects Ltd, jason.praill@unifyprojects.com - Decision-making timescales, with the political cycle leading to preferential decisions.

John Skelton, York, JSA Design & Developmen Ltd, john@jsadesign.co.uk - We experience difficulty in sourcing main contractors for small to medium size contracts between £100,000 and £2 million, as many

mid-range contractors have ceased trading, either through insolvency or by giving up in the face of rising and unpredictable costs and a lack of available skilled and trustworthy labour.

Mark Coates, Hull, Alan wood & Partners, mark.coates@alanwood.co.uk - High construction costs, and low property values and yields.

Paul Walker, York, Two Plus Two Commercial Services Ltd, paul@two-plus-two.com - A steady political environment, with visible commitment to the construction industry, is greatly needed.

Spencer Hunt, Leeds, Rex Procter and Partners, S.Hunt@rpp.co.uk - The most pertinent issue facing the construction market in energy infrastructure is ascertaining energisation dates with the DNO power organisations. These legal agreements are seldom executed on time, which causes significant delay and cost to projects, none of which can be recovered.

Methodology

The RICS UK Construction Monitor is a quarterly sentiment survey of Chartered Surveyors who operate across the UK. Data collection began in 1994 with additional questions introduced subsequently.

https://www.rics.org/uk/news-insight/research/market-surveys/

Total responses in Q3 2026 = 884

Regions:

- The 'headline' national readings cover Great Britain.
- Specifically, the five regions that comprise the national figure are: (1) London and South East, (2) South West/Wales, (3) Midlands/East Anglia, (4) North West/ North East/ Yorks & Humber, and (5) Scotland. Data on Northern Ireland are not included in the headline figure.
- National data are regionally weighted.

Sectors:

"Other public works" comprises factories, warehouses, oil, steel, coal, schools/colleges, universities, health, offices, entertainment, garages, shops and agriculture.

For sector definitions, http://www.ons.gov.uk/ons/rel/construction/construction-statistics/no--16--2015-edition/pdf-construction-statistics-appendix-2.pdf.

Net balance data:

- Net balance = Proportion of respondents reporting a rise in prices minus those reporting a fall (i.e. if 30% reported a rise and 5% reported a fall, the net balance will be 25%).
- The net balance measures breadth (how widespread e.g. price falls or rises are on balance), rather than depth (the magnitude of e.g. price falls or rises).
- Net balance data is opinion based; it does not quantify actual changes in an underlying variable.
- Net balance data can range from -100 to +100.
- A positive net balance implies that more respondents are seeing increases than decreases (in the underlying variable), a negative net balance implies that more respondents are seeing decreases than increases and a zero net balance implies an equal number of respondents are seeing increases and decreases.
- Therefore, a -100 reading implies that no respondents are seeing increases (or no change), and a +100 reading implies that no respondents are seeing decreases (or no change).
- In the case of the RICS price balance, a reading of +10 should not be interpreted as RICS saying that house prices are going up by 10%, but that 10% more surveyors reported increases rather than decreases in prices (over the last three months).

Questions Asked:

1a. How has the level of workloads changed over the last three months?

1b. Which sector do you think will see the strongest growth in output over the coming twelve months?

2a. How have infrastructure workloads changed across the following sub-sectors over the past three months?

2b. Which infrastructure subsector do you think will see the strongest growth in output over the coming 12 months?

3. How has the total level of New and R&M workloads changed over the past three months?

4. How have business enquiries for new projects or contracts fared in the past three months?

5. Have you hired anyone new (additional) in the past three months to support new workloads?

6. Have any of the following factors negatively impacted building activity over the past three months?

7. Has your company (or your contractors) experienced skills shortages in the past three months for the following occupations?

8. How have credit conditions changed over the past three months? How do you expect credit conditions to change over the next three/twelve months?

9. What are your company's expectations in each of the following areas over the next 12 months? (Workloads, headcount, profit margins)

11. How do you expect the following to change over the next twelve months?(Tender prices, construction costs, material costs, labour costs)

12. What are your company's investment intentions over the next 12 months?

Economics Team

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Delivering confidence

We are RICS. As a member-led chartered professional body working in the public interest, we uphold the highest technical and ethical standards.

We inspire professionalism, advance knowledge and support our members across global markets to make an effective contribution for the benefit of society. We independently regulate our members in the management of land, real estate, construction and infrastructure. Our work with others supports their professional practice and pioneers a natural and built environment that is sustainable, resilient and inclusive for all.

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