



Q2 2018: RICS UK Construction and Infrastructure Market Survey

Growth in workloads moderate amid stable expectations

- Private industrial and housing sectors see the most significant easing in activity
- New workloads moderate while R&M rises
- New business enquiries increase despite a compression in profit margin expectations
- Capacity constraints spur additional hiring as employment expectations remain strong

The results of the Q2 2018 RICS Construction and Infrastructure Market Survey point to a broad-based deceleration in the pace of output growth. A net balance of 15% report an increase in total workloads, down from 23% recorded in the previous quarter. Capacity remains a constraint on activity, however, with 34% more surveyors having increased headcount in the past three months to support new work.

Growth moderated across nearly all sectors with the private industrial and housing segments seeing the sharpest slowdown. That said, a net balance of 25% of contributors continue to report a rise in private housing activity, compared to 36% in Q1 and an average of 30% over the prior two years. Meanwhile, industrial workloads were flat, registering the weakest sentiment in over five years. Anecdotal evidence from respondents suggest that the housing market slowdown, coupled with ongoing ambiguity with the Brexit negotiations, is weighing on investment decisions.

Activity in the private commercial and infrastructure sectors eased to a similar extent as well displaying net balances of 12% and 11%, respectively. Rail, roads and energy are the subsectors expected to see the strongest growth in output over the coming twelve months, whereas the prognosis for communications is less positive than current conditions. Meanwhile, public sector workloads were mixed with surveyors reporting a modest acceleration to growth in housing (12%) but slowdown in non-housing (5%).

At the headline level, the pace of new workload activity growth moderated with the net balance moving from 22% to 16%, while the reading for repair and maintenance rose from 8% to 14%. When asked how business enquiries for new projects or contracts have fared in the past three months, 14% more respondents reported an increase rather than a decrease.

The more uncertain outlook for the economy as a whole has led to a less optimistic assessment for the sector over the year ahead; even so, 41% more contributors expect activity to rise rather than fall. This is down from 46% the previous quarter. Likewise, a net balance of 28% foresee an increase in hiring, compared with an average of 32% over the four previous quarters.

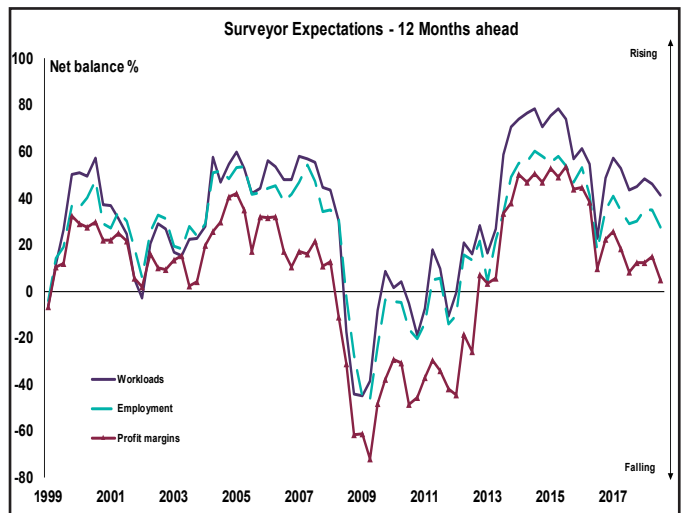
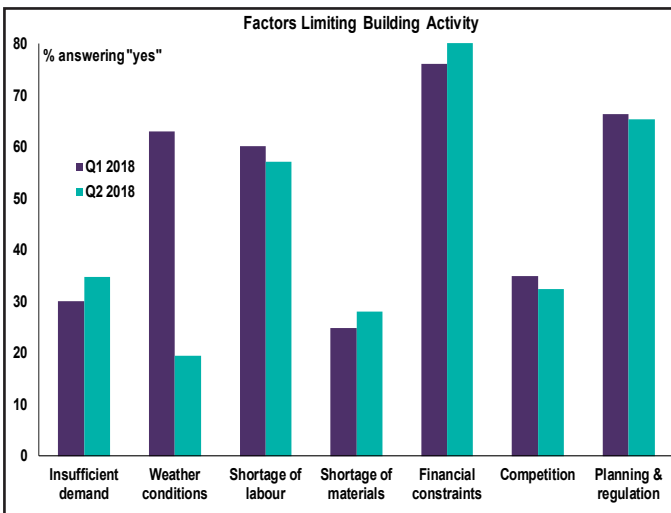
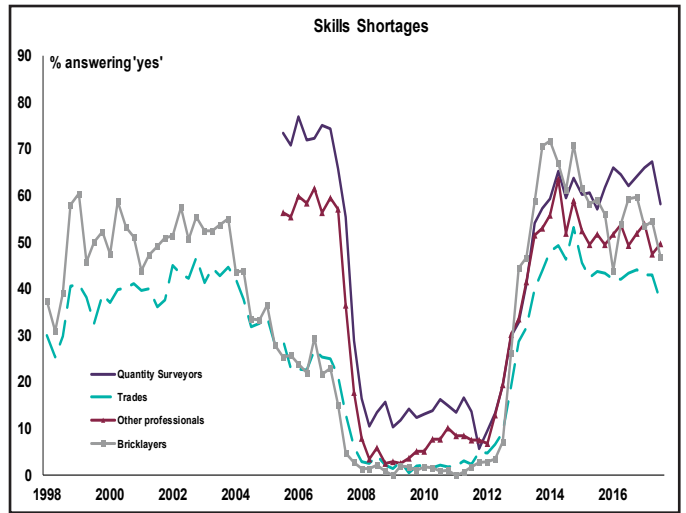
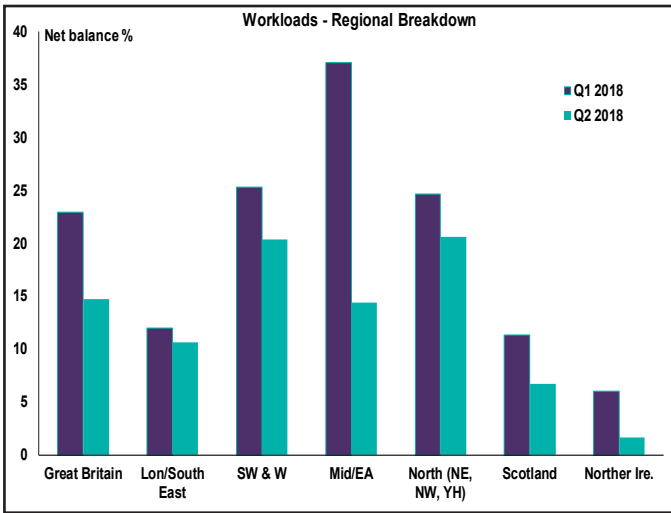
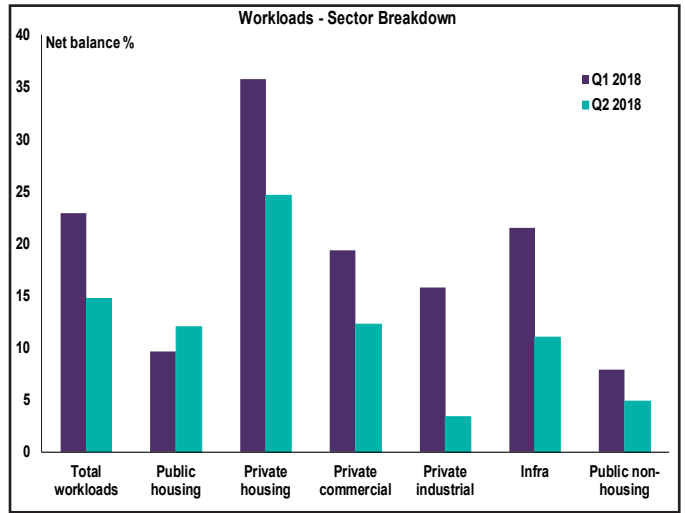
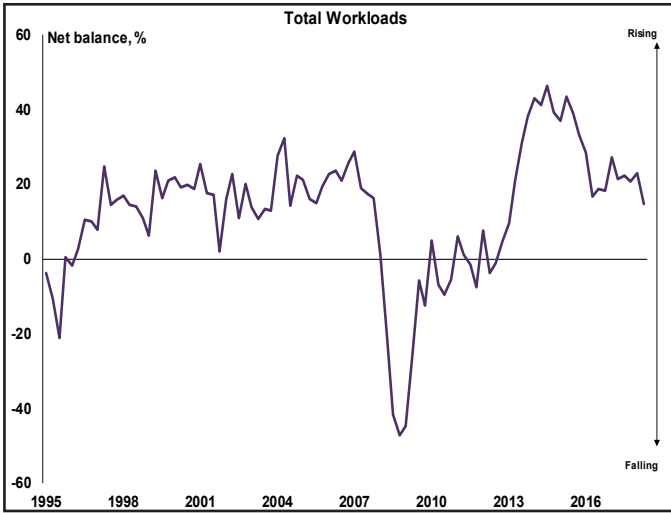
Although tender price expectations over the next twelve months have moderated in Q2, 54% and 48% more respondents still envisage greater price pressures in the building and civil engineering areas, respectively. The expected increase in tender prices may signal rising input costs and shrinking profit margins for businesses. Indeed, expectations on profit margins have eased from a net balance of 15% to 5% in the latest results.

Financial constraints are reported by 80% of surveyors to be by far the most significant impediment to building activity (from 76% in Q1), the joint highest reading in five years. Difficulties with access to bank finance and credit, along with cash flow and liquidity challenges, are often cited reasons alongside generally less favourable cyclical market conditions. Concerns regarding planning delays and restrictive regulations have not eased either and remain at elevated levels relative to when data collection began in 2012. Ranking third, and despite having eased in recent quarters, the shortage of skilled labour continues to pose a challenge for businesses, particularly with regard to professional services such as quantity surveying.

In terms of geographical breakdown, workload growth is now reported to be decelerating across all regions. This is particularly the case in the Midlands and East Anglia, which was led by the first decline in industrial activity in over five years. Meanwhile, the momentum of growth in infrastructure activity has slowed noticeably in London with just 3% of respondents reporting an increase rather than a decrease (compared to the five-year average of 27%). Furthermore, according to the latest data, this sector is now shrinking in both Scotland and Ireland.

By way of contrast, workloads remain resilient in the North and South West, supported by solid activity in private housing. Across all regions, Yorkshire and Humberside report the strongest pace of growth in new business enquiries and additional hiring over the past three months. This sanguine assessment extends to the year ahead where, along with the Midlands, both activity and employment are expected to improve.

Key indicators



Chartered Surveyor market comments

London

Ahmed Amrouche, London, Mott MacDonald, ahmed.amrouche@mottmac.co.uk, 020 7651 0582 - Brexit uncertainty would affect the construction industry.

Andrew Venn, Sutton, Wicksteeds Consultants LLP, AndrewVenn@Wicksteeds.co.uk - Clients are prepared to postpone development until they have ensured that competitive tenders have been sought on detailed documents, including Bills of Quantities, to ensure they have the information required for sound cost management.

Antara Sundararajan MRICS, London, Oxford Properties, asundararajan@oxfordproperties.com, 07729999005 - Planning regulations.

Christopher Mills FRICS, Wrotham, Chris Mills Consulting Limited, chris@chrismillsconsulting.co.uk, 07813036395 - Brexit and the uncertainty of labour from EU countries has affected labour resources on construction sites. This, in turn, has made tender sums increase without increase in contractor profits. This may have an affect on profitability going forward.

David Adesoye, London, London & Quadrant Housing Trust, dadesoye@lqgroup.org.uk, 07877678005 - Lack of skilled labour to take on the workload.

Ercan Baydur, London, Private, Ercan.baydur@hotmail.co.uk, 07525702865 - Risk of Brexit, stamp duty and other purchase costs are affecting confidence in foreign investment in the London residential market.

Graeme Burton MRICS, Thundridge, Pridmore-Cox, gcburtons@gmail.com, 07972 507 161 - The market over the next 12 months is uncertain and until there is a firm outcome regarding Brexit, I feel investment will continue to remain static.

Hugh Cross, London, Hill Cross, hugh@hill-cross.com, 0780 193 1721 - The reduction in financial activity and inward investment has resulted in a significant downturn in residential refurbishment work for letting and sale.

Nigel Bellamy, London, 8build limited, n.bellamy@8build.co.uk, 07831 195879 - Client budgets still often unrealistic.

Richard Petterson MRICS, London, Hother Associates LLP, rpetterson@hother.co.uk, 02089477999 - Planning delays and Brexit fears are the main factors negatively affecting activity.

Tim Sketchley, London, Old Park Lane Management Limited, tsketchley@oplml.co.uk, (020) 7409 7055 - Political uncertainty, causing a lack of momentum in decision-making.

South East

Gordon Colbourne MRICS, Fareham, Daniells Harrison Chartered Surveyors, gc@dhcs.co.uk, 01329221199 - Planning consent taking longer than acceptable, materials and labour shortages - fewer Europeans available to work, lack of UK skilled labour

Nick Mills MRICS, Watford, TJX Europe, nick_mills@tjxeurope.com, 0772684243 - Since the advent of Brexit there is a noticeable level of caution in new investment project on the expectation that inflation and recession may well occur.

Paul Spelzini, St.Albans, PQS Associates, paulspelzini@aol.com, 07941784473 - St.Albans is a unique market with 10% growth, bucking the county/national trend. However there are real problems with the local plan and housebuilding/transport particularly, stifling development and infrastructure.

Robin Goddard BSc FRICS, Dorking, Brodie Plant Goddard, robin.goddard@bpg.co.uk, 01306 887070 - Economic conditions and the impact of the Grenfell fire are still having an impact on clients in making important investment decisions. New build remains buoyant but repair and maintenance projects are staying on the shelf!

North East

Marcus Lidster, Lythe, Mulgrave Estate, marcus.lidster@mulgrave.net, 01947 893239 - Lack of government investment in North East infrastructure.

North West

Andrew Webster FRICS, Rochdale, Calvert & Webster, calvertwebster@btinternet.com, 01706 344 826 - The uncertainty about the Brexit deal is causing delay to several projects.

Anthony Dillon MRICS, Manchester, Willmott Dixon, anthony.dillon@willmottidixon.co.uk, 01619473960 - The market remains buoyant and the better contractors and supply chain can be selective in the workload they pursue, selecting framework and two stage over single stage opportunities. The market is yet to feel the full impact of Carillions demise.

Gary Bulloch, Manchester, Savills, gbulloch@savills.com, 07870555826 - Manchester's rising momentum.

Mark Humphreys MRICS, Liverpool, Laing O'Rourke Construction, mhumphreys@laingorourke.com - The squeeze on Main Contractors and unsustainable margins over recent years resulting in a high risk environment and numerous liquidations and cash poor contractors. Possibly also the Brexit effect which is an unknown.

Nick Wdowczyk MRICS, Huddersfield, Walker Sime Limited, nwdowczyk@walkersime.co.uk, 01618729955 - The demand for Tier 1 contractors within the North West has severely exceeded supply, which has resulted in a sharp escalation of construction costs within large city center projects.

Yorkshire and Humberside

David Bishop, Doncaster, dba project and Cost Consultancy Ltd, david@dbamanagement.co.uk, 01302719919 - Utilities continue to be a key factor influencing timely delivery of projects.

Paul Walker MRICS MAPM MCI Arb, York, Twoplustwo Commercial Services Ltd, paul@two-plus-two.com, 07901 000393 - Activity in the Rail Sector with regards to new frameworks is progressing in the early stages. Brexit uncertainty still appears to be having an impact on investment.

South West

Adrian Birch BA BSc MSc(Arch) Dip Proj Man FRICS, Chepstow, Adrian Birch Associates, adrianbirch1@gmail.com, 01291689812 - Reduction and imminent removal of Severn Bridge tolls is likely to make South East Wales and the Forest of Dean more attractive in the short term for housebuyers and investors due to the price differential of land and property with Bristol.

Angus Johnstone, DT6 3FJ, ZeroC, angusjohnstone1988@yahoo.co.uk, 07857682605 - Shortage of skills has reduced pool of labour to draw from, build cost increases are causing pressure on basic KPIs, property values are over inflated reducing amount of buyers.

Jerry Thomas, Gloucester, Smith Thomas Consult, jerry@smiththomas.co.uk, 01452 831341 - Brexit uncertainty.

Chartered Surveyor market comments

Jestyn Coke, Blandford, a jestyncoke, ajc@ajestyncoke.co.uk, 01258 454029 - The amount of new build in the area is affecting the normal situation resulting in skill shortages.

Trevor Barfoot, Paignton, Aspectum Chartered Building Consultancy, tjb@tjbarfoot.co.uk, 01803559455 - A local council that is in crisis with no effective department management at the helm with many departments and in particular a planning that is struggling through lack of staff.

Wales

Andrew Banfield, Swansea, Interserve, andrew.banfield@interserve.com - Lack of funding and delays on business case approval on Government funded projects.

Francesco Marino, Cwmbran, Booker plc, marinomundi@hotmail.com, 07807 093338 - A lack of skilled experienced quality staff sometimes with bad attitude and unrealistic expectations.

Geraint Morgan MRICS, Bangor, Gwynedd, Watkin Jones and Son Ltd, geraint.morgan@watkinjones.com, 01248362516 - Lack of clarity on Brexit is delaying investment decisions. Recladding works post Grenfell has resulted in material delays. Government should consider reducing VAT on recladding repairs for Private owners.

Kevin Hughes FRICS, Llandudno, Nass Asbestos Surveyors, khughes@gmail.com, 07508955401 - Lack of understanding of H&S obligations, e.g. residential landlords.

West Midlands

Andy Irvine BSc FRICS, Birmingham, Cushman & Wakefield, andy.irvine@cushwake.com, +7771604550 - Activity levels have definitely plateaued - BREXIT remains the 'elephant in the room' so let's hope for a positive World Cup to improve the mood!

David Lang MRICS, Wrexham, Viaduct Ltd, dlang.longueville@gmail.com, 07917268248 - Network Rail end of Control Period 5 slow down.

Paul Stone, Sutton Coldfield, Chalcraft Construction, paulstonie@gmail.com, 07527 189614 - Business uncertainty caused by Brexit.

Phil Hodges MRICS, Redditch, Ridgeways Chartered Quantity Surveyors, phil@ridgewaysqs.co.uk, 01527894514 - Plenty of tenders but not all yet progressing to construction stage due to funding / market concerns.

Roland Browne Assoc RICS, Birmingham, Comex 2000 (UK) Ltd, roland1browne@gmail.com, 07956108551 - The impact of Brexit is leading to reduced investment, leading to falling work requirements.

East Midlands

Adrian Cox CEnv., FRICS, FCIQB, Nottingham/ Alfreton, Waystone Limited, adrian.cox@waystone.co.uk, 01773524510 - Network Rail obstructive to long term projects through inability to stick to agreements.

David Morris MRICS, Wellingborough, Tompkins Robinson Surveyors, davidm@tompkinsrobinsonsurveyors.co.uk, 01933 223307 - We remain very busy across all sectors and are looking to expand in the short to medium term.

Paul Clarkson MRICS FCIQB, Nottingham, AMBA Estates Ltd, Paulclarkson@ambaestates.com, 07496679953 - Inability to obtain planning permissions and funding for public sector housing.

Eastern

Annett Thompson, Ipswich, Concertus Design And Property Consultants, annett.thompson@concertus.co.uk, 07917 517235 - The Grenfell Fire impact is starting to impact on building construction and brickwork prices have doubled. Brexit uncertainty is influencing fixed price contracts. Main Contractors are strengthening their Quality Inspection processes.

Christopher Wood MRICS, Cambridge, Morgan Sindall, chris.awood@morgansindall.com, 07907558128 - Labour costs are increasing monthly. Cambridge needs additional infrastructure investment urgently to support current demand and future demands.

Robert Franklin MRICS, Bedford, Robinson & Hall LLP, rjf@robinsonandhall.co.uk, 01234 352201 - Many contractors continue to be committed with longer lead-in start times for new projects. Shortages of labour and materials make it extremely challenging to manage projects.

Northern Ireland

Adrian Petticrew MRICS, Belfast, Kier Limited, adrian.petticrew@kier.co.uk, 02890834101 - Without a functioning Executive at Stormont; a recent High Court decision reversing approval for the incinerator at Mallusk, has cast further doubt on the ability of Departments to approve strategic planning decisions & future expenditure on projects.

Andrew Murray MRICS, Belfast, Bruce Shaw, andrew.murray@bruceshaw.com, 028 9032 1056 - Funding and Planning Approval.

Geraldine Gordon, Belfast, GBC, g.gordon31@hotmail.co.uk, 07917886937 - Lack of political decision making locally and lack of clarity on Brexit to facilitate planning.

Gerard Mc Caffrey, Omagh, GABE IS Ltd, g.mccaffrey@gabrielhughes.com, 02882240391 - We are afraid of Brexit and have set up a sister company in the Euro zone to help us in the event of a catastrophic Brexit.

John Fitchie MRICS, Newtownards, Red Row Associates, redrowassociates@gmail.com, 07753851847 - Lack of local government.

Michael Creed BSc MSc Surv MRICS MAPM, Belfast, WH Stephens, mfmcreed@gmail.com - Lack of NI Assembly for decision making & government leadership.

Norman lambe, Lisburn, Earney Contracts Ltd, Norman@earneycontracts.co.uk, 02892638269 - Lack of devolved government. The construction industry will soon be in crisis in Northern Ireland.

Oliver Smith, Ballymena, SurveyLink [NI] Ltd, ollie.smith@tiscali.co.uk, 07890 555108 - Lack of Stormont Executive in Northern Ireland and a toothless Civil Service has led to a rudderless ship with no obvious strategic plan or capital expenditure plan.

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Methodology

About:

The RICS Construction and Infrastructure Market Survey is a quarterly sentiment survey of Chartered Surveyors who operate in the UK.

Total responses in Q2 2018 = 297

Regions:

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

Questions asked:

1. Which area are you completing the survey for?
- 1b. How has the overall level of new orders changed over the last three months?
2. With regards to infrastructure, how have workloads changed across the following sub sectors over the last three months?
 - 3a. Which infrastructure subsector do you think will see the strongest growth in output over the coming 12 months?
 - 3b. Regarding the infrastructure sector, what type of investment is most needed in your area?
4. How has the total level of New and R&M workloads changed over the last three months?
5. Have any of the following factors impacted building activity over the last three months?
 - 5b. Which segment of the market do you feel is most impacted by constraints on financing?
6. What are your company's expectations in each of the following areas over the next 12 months?
7. At what level of capacity is your business currently operating? (as a % of full capacity)
8. Has your company (or your contractors) experienced skills shortages in the latest three months for the following occupations:
9. What are your company's expectations for tender prices in each of the following areas over the next 12 months?

Net balance data:

- **Net balance = Proportion of respondents reporting a rise in prices minus those reporting a fall (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).

- A change from +30 to +60 does not mean that the variable grew by 30% in one period and by 60% in the next period, but it does indicate that twice as many surveyors reported an increase compared to a decrease than in the previous period.
- Likewise, if we get a reading dropping from +90 to +5, this still means that more respondents are reporting increases than decreases overall, but the breadth of those reporting increases has fallen dramatically; meanwhile, a shift in the reading from -90 to -5 still means that more respondents are reporting decreases than increases overall, but the breadth of those reporting decreases has fallen dramatically.

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Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to the markets we serve.

We accredit 118,000 professionals and any individual or firm registered with RICS is subject to our quality assurance. Their expertise covers property, asset valuation and real estate management; the costing and leadership of construction projects; the development of infrastructure; and the management of natural resources, such as mining, farms and woodland. From environmental assessments and building controls to negotiating land rights in an emerging economy; if our members are involved the same professional standards and ethics apply.

We believe that standards underpin effective markets. With up to seventy per cent of the world's wealth bound up in land and real estate, our sector is vital to economic development, helping to support stable, sustainable investment and growth around the globe.

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