



Q3 2018: RICS UK Construction and Infrastructure Market Survey

Lead-up to Brexit adds to uncertain outlook ahead

- Workloads continue to rise across all sectors and geographic regions as profit margins are squeezed
- Infrastructure activity reaccelerates led by rail, roads and energy
- New business enquiries and hiring increase despite tightening credit conditions
- Awareness and interest of international standards such as ICMS is growing

The results of the Q3 2018 RICS Construction and Infrastructure Market Survey point to a pick up in the pace of output growth across the sector. A net balance of +20% reported an increase in total workloads, which is up from the +15% recorded in the previous quarter. Workload and employment expectations for the year ahead have eased but remain generally positive, while the outlook for profit margins fell modestly for the first time in nearly seven years. As the deadline for a Brexit withdrawal agreement nears, businesses express heightened unease particularly with regard to the recruitment and retention of skilled workers.

The tone of the data in Q3 was positive across most sectors with both new work and R&M activity rising steadily. Private housing reported the strongest rise in workloads with 30% more respondents citing an increase rather than a decrease (compared to 25% in Q2). An improvement in sentiment was most notable in the infrastructure sector (+22%) which regained momentum after a dip in the previous quarter. Meanwhile, growth in activity across the private industrial and public non-housing categories improved modestly with net balances of 9% and 11%, respectively. A soft patch was most observable in public housing where the pace of workloads slowed from +12% to 7%, but in time this should be supported by the lifting of the HRA borrowing cap that was recently announced by Theresa May.

Within infrastructure, rail, roads and energy are the subsectors expected to see the strongest expansion in output over the coming twelve months. Following the go-ahead from Government on major projects such as Hinkley Point C, HS2, Crossrail and Heathrow it is likely that these are underpinning the growth as work starts to get underway. The government's Industrial Strategy and Construction Sector Deal roll-out will include other projects that are expected to incorporate various aspects of digital techniques, modern methods of construction and whole life asset performance as well. The risks are that this growth will be highly dependent upon main works at just a few sites.

A less sanguine, and more uncertain, outlook for the economy as a whole has led to a reduced optimism for the construction sector over the year ahead. Even so, 33% more contributors expect activity to rise rather than fall, down from 41% in Q2, and a net balance of 25% foresee an increase in hiring.

When asked how business enquiries for new projects or

contracts have fared in the past three months, 24% more respondents reported an increase rather than a decrease (compared to 17% in the prior quarter). Capacity remains a constraint on activity, however, with 42% more surveyors having increased headcount in the past three months to support new work.

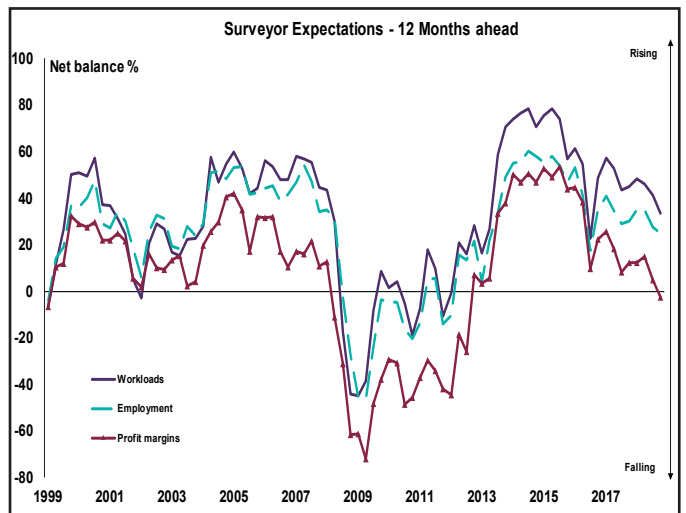
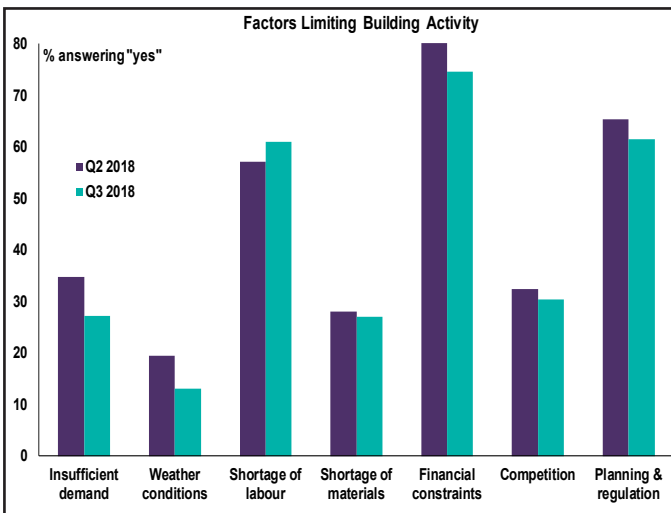
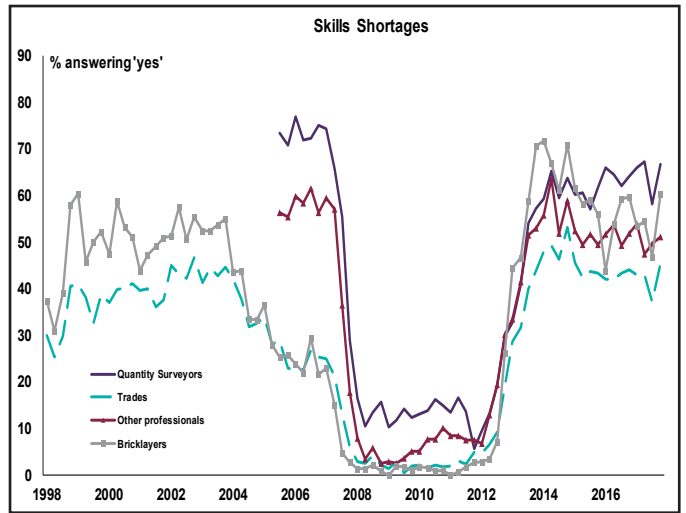
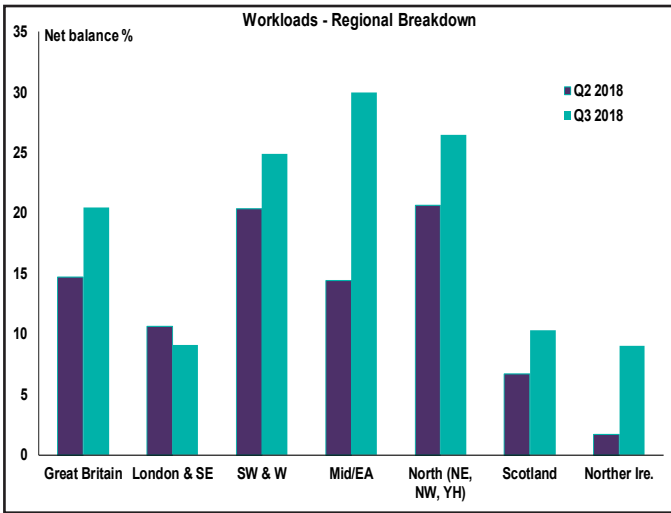
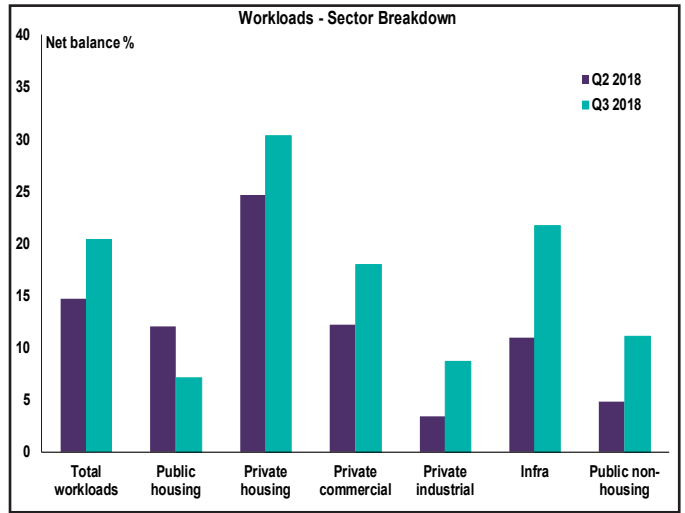
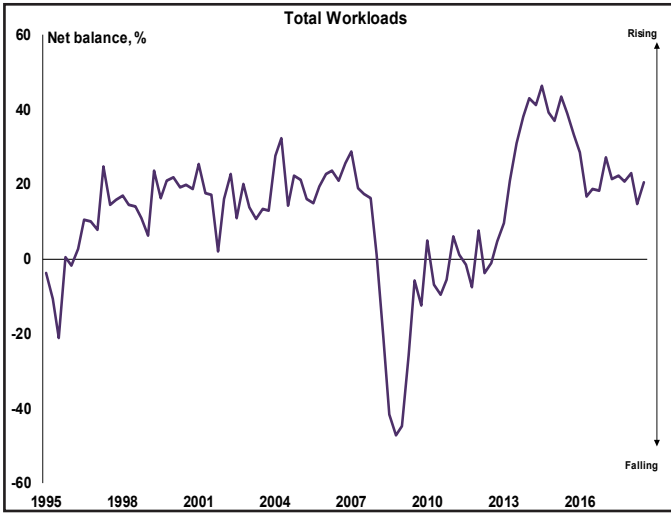
Higher input costs and a build-up of competitive bidding pressures now appear to be negatively impacting on profit margins with a net balance of -3% of contributors expecting a fall in margins over the coming year, the first decline in six years. At the same time, tender prices are expected to rise in both the building and civil engineering subsectors, with the former expected to face comparatively greater pricing pressures. Specifically, 61% more respondents believe tender prices will go up in the building category (rather than fall).

Financial constraints are reported by 75% of surveyors to be by far the most significant impediment to building activity (from 80% in Q2). 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. When asked how credit conditions have changed over the past three months, 12% more respondents report a deterioration rather than improvement. This negative sentiment becomes even more protracted at the three and twelve month horizons as well.

Although industry and government aspire to move toward a more collaborative approach to the commissioning, design and delivery of construction projects, only 9% of surveyors are aware of the Project 13 programme launched last year to improve performance. More encouraging is that 54% of contributors either currently use or would like to know more about international standards such as ICMS.

In terms of geographical breakdown, workloads are now reported to be increasing across all regions, with a notable acceleration in the Midlands and East. While the pace of private housing activity was strongest outside of London and the Southeast, the industrial and infrastructure sectors in Scotland and Northern Ireland continued to contract. Since the start of 2018, the outlook on profit margins has been most stable in the Southwest and Wales (+12% in Q3) relative to a broad-based slowdown elsewhere. By way of contrast, this region is expected to experience the most pronounced deterioration in credit conditions over the coming year.

Key indicators



Chartered Surveyor market comments

London

Andrew Christie, Borehamwood, Hertfordshire, Andrew Christie Associates, andrew.christie@aca-surveyors.co.uk, 02038753363 - Brexit uncertainty and cuts by Government for social housing.

Bola Abisogun FRICS, London, Urbanis Limited, bola@urbanis.co.uk, 020 7608 0808 - Protracted uncertainty around BREXIT continues to proffer a decimation of current / secured workload and other commercial prospects.

Emil Odei MRICS, London, Skanska UK Plc, emilodei@gmail.com, 07985414421 - Lack of skilled resources is definitely an issue.

Florentino Bercasio MRICS, London, AECOM, florentino.bercasio@aecom.com, 07785515065 - The uncertainty with the Brexit agreement is one of the factors that is affecting our construction industry.

Guy Solway, London, Faithful + Gould, guy.solway@fgould.com, 02071212014 - The overall building market is very apprehensive with regard to BREXIT, but all things considered fairly robust.

Mark Myers AssocRICS, London, M Myers PM Ltd, m_myerspm@aol.co.uk, 07557286979 - Lack of professional and trade skills in the commercial office market likely to be made more problematic with BREXIT and limits on immigration and labour movement.

Raymond Coppins MRICS, Ealing, London, Ealing Council - PSDU, coppinsra@ealing.gov.uk, 02088258142 - Shortage of competent roofers in the summer months.

Richard Becksmith B.Sc. MRICS, Watford, Mapeley Estates, richard.becksmith@mapeley.com, 07980753836 - Post Brexit, certainty with EU supply chain and costs is a concern.

Richard Petterson MRICS, London, Hother Associates LLP, rpeterson@hother.co.uk, 02089477999 - Planning delays and Brexit uncertainty continue to impact activity.

South East

Andrew Ayeni, Grays, UK Power Networks, andrewyeni@hotmail.com, 07940770224 - Uncertainties surrounding Brexit affecting labour and government investments.

Keith Gale MRICS, Winchester, Hampshire County Council, keith.gale@hants.gov.uk, 01962 847271 - The continuing uncertainty over Brexit negotiations is affecting investment programmes for long term capital projects. Fluctuations in currency markets is also affecting base resources such as oil and bitumen based products,

Gordon Colbourne MRICS, Fareham, Daniells Harrison Chartered Surveyors, gc@dhcs.co.uk, 01329221199 - Planning consent still taking longer than acceptable. Materials and labour shortages still occur. Even fewer Europeans available to fill gaps in UK skilled labour. Quality of output of non-UK "skilled" labour is poor.

Jack Clements, Chislehurst, Keltbray, jackclements90@googlemail.com, 07809461987 - HS2 seems to require the construction industry to grow, and with relevant media coverage regarding the shortage of labour and increased costs, I am not sure how the industry will perform with HS2 and other projects running. Capacity remains a concern.

James Collins MRICS, Stansted, Grenville Construction Ltd, jim@grenville.uk.com, 01278 647431 - Potentially Brexit could have a dramatic effect on construction output in the next 12 months.

Paul Dean MRICS, Kings Langley, Langley Construction Consultants Ltd, paul@langleyconstructionconsultants.co.uk, 07872040999 - My clients are still asking for SMM7 and are slowing moving to NRM2. Very few have heard of ICMS at this time.

Peter Allen BSc, MRICS, MCIQB, Oxford, Oxford Brickwork Ltd, peter@oxfordbrickwork.co.uk, 01865 865924 - Shortage of skilled bricklayers affecting productivity.

Robin Goddard BSc FRICS, Dorking, Brodie Plant Goddard, robin.goddard@bpg.co.uk, 01306 887070 - There is a slow down in new instructions coming through, the reasons for which are unknown! However there still seems to be a degree of uncertainty about the future, especially in the health and public housing areas.

North East

Mohamed Haris Deen FRICS, Woolmer Green, Knebworth, Self Employed, deenmohamed835@gmail.com, 01438815712 - Financial constraints and BREXIT uncertainties are causing investment concerns in the Industry.

Peter Carruthers, Newcastle upon Tyne, Summers Inman Construction & Property Consultants, peter.carruthers@summers-inman.co.uk, 01912841121 - The lack of clarity over Brexit terms continues and it is difficult to forecast how this will impact on the industry. It is not surprising that confidence levels appear fragile at times.

Stephen Whaley FRICS, Durham, Northumbrian Water Limited, stephen.whaley@nwl.co.uk, - Lots of private retail and educational construction spend in Durham.

North West

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

Anthony Dillon, Manchester, Willmott Dixon Construction, anthony.dillon@willmottdioxn.co.uk, 01619473960 - The market remains buoyant with better contractors/supply chain being selective in opportunities they pursue. The fallout from Carillion demise is continuing to impact the market.

David Thoms, Lytham St Annes, Duxburys inc Peter Dawkins and Co, info@duxburys.co.uk, 07513545139 - Slowing trends and uncertainty over finance Brexit confusing people; failure to commit.

Frederick John Austen FRICS, Congleton Cheshire, John Austen Associates td, info@john-austen.co.uk, 01260 273908 - Increased house building affecting labour rates in other sectors.

Gary Bulloch MRICS, Manchester, Savills, gbulloch@savills.com, 01612777247 - Merry-go-round of management and senior contractor staff impacting on project delivery.

Gordon Clark FRICS, Carlisle, Johnstons Chartered Quantity Surveyors, gordon@johnstons.co.uk, 01946 694970 - Continued uncertainty surrounding Brexit investment decisions is leading to delays in building investment decisions.

John Stockton AssocRICS, Preston, Hawthorn Estates NW Ltd, johnstockton1@sky.com, 01772816220 - More trained operatives are required in the industry. Will Brexit impact on this?

Les Beardon FRICS, Ramsey, Paul Carey & Sons Ltd, lesbeardon@yahoo.com, 01624 818188 - We have experienced a tardiness in suppliers/merchants to return tender enquiries.

Nick Alston, Liverpool, Sainsburys, nickalston@hotmail.com, 07836 503061 - Government needs to tax the internet companies to maintain a fair playing field with the retail sector.

Chartered Surveyor market comments

Nick Wdowczyk MRICS, Huddersfield, Walker Sime Limited, nwdowczyk@walkersime.co.uk, 01618729955 - Still uncertainty surrounding Brexit and the potential outcomes. This is a factor in Clients decision making on projects on whether to proceed or wait.

Yorkshire and Humberside

Alan Dickinson FRICS, Hull, Dukes Sutton & Dickinson, dickinsonqs@dickinsonqs.karoo.co.uk, 01482 657371 - Lack of Central Government interest.

Richard Batte, Wakefield, Assent Building Control Ltd, richard@assentbc.co.uk, 07815837110 - Shortage of experienced Building Control Surveyors.

Stanislav Andryszewski MRICS, Skipton, Craven District Council, sandryszewski@cravencd.gov.uk, 07584023939 - Shortage of apprentices in the trades (bricklayers, plasterers) and graduate technical staff.

South West

Ed Vereker, Exeter, Savills, ed.vereker@savills.com - A lack of practicality and construction knowledge amongst conservation offices. A lack of clear direction in relation to Brexit and beyond March 2019 is hindering decision making on new build/major refurbishment projects.

Jestyn Coke, Blandford, A Jestyn Coke, ajc@ajestyncoke.co.uk, 01258 454029 - Having a project near the Hickeys Power station has affected the general building availability of builders as many have gone to work at the project.

Peter N Fell FRICS, Bath, Watson Bertram & Fell, peter@wbf-bath.co.uk, 01225337273 - Uncertainty due to the possibility of an unsatisfactory Brexit is depressing the outlook for property and construction.

Wales

Gareth Humphreys, Caernarfon, Gareth Humphreys Chartered Surveyor, dawn@jamesproperties.co.uk, 07973 142301 - Lack of speed of

Government decision making.

Geraint Morgan MRICS, Bangor, Watkin Jones and Son Ltd, geraint.morgan@watkinjones.com, 01248362516 - Planning still seems to be a hurdle in getting future schemes on site.

Mark Downner MRICS, Mold, WYG, mark.downer@wyg.com, 01352 706207 - No major change in the last 3 months. Demand has generally been steady though we have noted an increase in bids for professional services for public housing in particular in the last month, suggesting construction activity is being programmed.

Steven Massie, Oswestry, SJM Surveyors, steven@massie.com, 01691898560 - Inferior quality of Access road (A5) is a prime problem delaying improvements in area improvements

West Midlands

Alan Mudd BSC MRICS, Napton, Alan Mudd Associates Ltd, alanmudd@alanmudd.plus.com, 01926810677 - New housing.

Phil Hodges MRICS, Redditch, Ridgeways Chartered Quantity Surveyors, phil@ridgewaysqs.co.uk, 01527894514 - Confusion as to the likelihood of a downturn or not - do we believe the Press? Most of our clients are ploughing on with their property investments regardless of threats of such a downturn though.

East Midlands

Adrian Cox, Alfreton, Derbyshire, Waystone Limited, adrian.cox@waystone.co.uk, 07703372151 - Uncertainty.

David Morris MRICS, Wellingborough, Tompkins Robinson Surveyors, davidm@tompkinsrobinsonsurveyors.co.uk, 01933 223307 - Strong demand for QS services across all sectors. Workload remains very buoyant.

Eastern

Annett Thompson, Ipswich, Concertus Design and Property Consultants, annett.thompson@concertus.co.uk, 07917517235 - Huge shortage of bricklayers, steel and metal prices are going

up, and inflation is now being considered by contractors on fixed priced contracts.

Chris Keeble BScDipProjMan MRICS, Ipswich, Gill Associates, ckeeble@gillassociates.co.uk, 01473 214646 - Still very competitive fee levels. Planning delays are becoming a major issue and constraint.

Jonathan Nelson FRICS, Norwich, Richard Utting Associates LLP, jonathan.nelson@richarduttingassociates.com, 01603611281 - Shortage of skilled professionals slowing business growth in the East.

Paul Smith, St. Albans, PQS Associates, paulspelzini@aol.com, 07941784473 - Brexit and HS2 could change the situation.

RJ 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.

Trevor J Agg, Ipswich, Concertus Design & Property Consultants Ltd., trevor.agg@concertus.co.uk, 01473 316600 - Clients generally slow to order projects due to financial uncertainty over Brexit.

Scotland

Rod Shaw MRICS, Edinburgh, Thomson Gray, rod.shaw@thomsongray.com, 01312265076 - Business confidence amongst Scottish SME's remains fragile given the continuing Brexit uncertainty and the likely negative impact on business activity of a no deal exit from the European Union.

Northern Ireland

Adrian Petticrew MRICS, Belfast, Kier Limited, adrian.petticrew@kier.co.uk, 02890834101 - Lack of a Local Executive at Stormont is really hampering investment strategy in Capital Works Projects at present and going forward. Civil Engineering and other Infrastructure Projects on hold.

George Williamson, Coleraine, Brian Canavan Associates, geordiewilliamson@hotmail.com, 07775500377 - Current Planning policy in my local area was derived from a period when the construction and business/residential market was in a different place. There is no flexibility within the Policy to facilitate a complete change in the local market.

Gerard Lundy, Belfast, Graham, gerard.lundy@graham.co.uk, 07818575575 - Northern Ireland is suffering from both a lack of devolved government and the uncertainty around Brexit. This has resulted in key projects being shelved and investment decisions for large scale public and private sector projects facing continued delays.

Harry Ferson MRICS, Belfast, Wyg, harry.ferson@wyg.com, 07714740865 - Lack of Assembly at Stormont is the major downside issue for all of NI.

John Reid, Belfast, KS&P, johnreid.ksp@googlemail.com, 07717725286 - The lack of an operating devolved government is hampering investment in large infrastructure projects

Michael McCaughey MRICS, Dungannon, M.J.McCaughey Ltd, michael@mjmccaughey.com, 028 87727270 - No local government.

Norman Lambe MRICS, Belfast, Earney Contracts Ltd, norman@earneycontracts.co.uk, 02892638269 - Lack of local government and reduced government department expenditure.

Oliver Smith, Ballymena, SurveyLink [NI] Ltd, ollie.smith@tiscali.co.uk, 07890 555108 - Lack of Stormont Executive in Northern Ireland continues to have a significant negative impact on all areas of the construction industry

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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 Q3 2018 = 327

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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