



Q3 2016: RICS UK Construction Market Survey

Expectations improve but Brexit effect still being felt

- Workload continue to rise at a steady, albeit more moderate pace
- Financial constraints and skills shortages remain the key impediments to growth
- Expectations for future growth improve, but remain lower than pre-EU vote

The Q3 RICS Construction Market Survey shows a broadly steady pace of growth relative to the previous quarter with a net balance of 19% of surveyors reporting their workloads to have risen. However, this still represents a significant slowdown on the rate of growth that has prevailed over the previous three years with most sectors seeing some moderation.

The net balance of respondents reporting a rise in activity either remained broadly stable or increased slightly in all subsectors in Q3. The private housing segment continues to see the strongest momentum with 27% more contributors seeing their workloads rise rather than fall during the quarter. In the private commercial sector a net balance of 16% of contributors reported a rise in workloads, broadly unchanged relative to Q2. Meanwhile, activity in the industrial sector also increased slightly with a net balance of 13% of respondents seeing a rise, up from 6% in Q2. In the infrastructure sector, 17% more contributors reported a rise rather than a fall in workloads and respondents expect the road and rail subsectors to be the drivers of growth in their infrastructure workloads over the coming 12 months. Meanwhile, activity in the public sector continues to underperform all others.

While skills shortages have eased slightly in recent quarters as activity has moderated, they remain high by historical standards with 51% of contributors reporting them as a constraint on growth. Quantity surveyors and bricklayers remain in particularly short supply with 62% and 56% of contributors, respectively, reporting problems sourcing labour in these areas. In an extra question added to gain insights into industry views on the upcoming apprenticeship levy, to be introduced next April, only 29% of contributors felt confident that the policy would help to address future skills shortages. Most respondents were unsure whether the policy would have any effect with anecdotal evidence suggesting that a broader policy approach was needed.

However, financial constraints remain the most significant

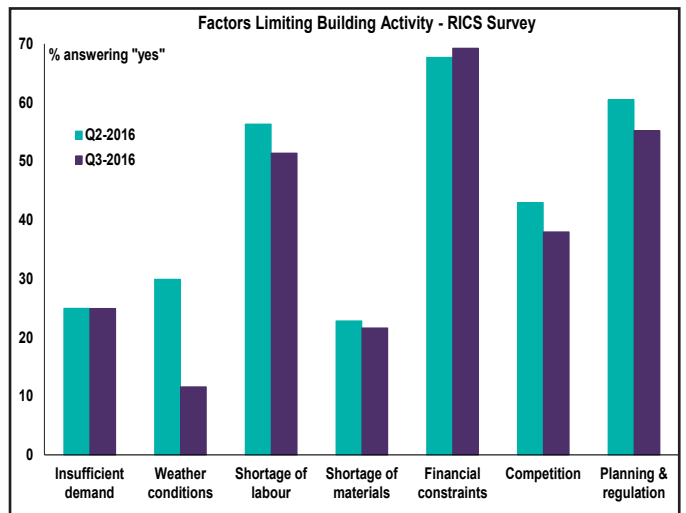
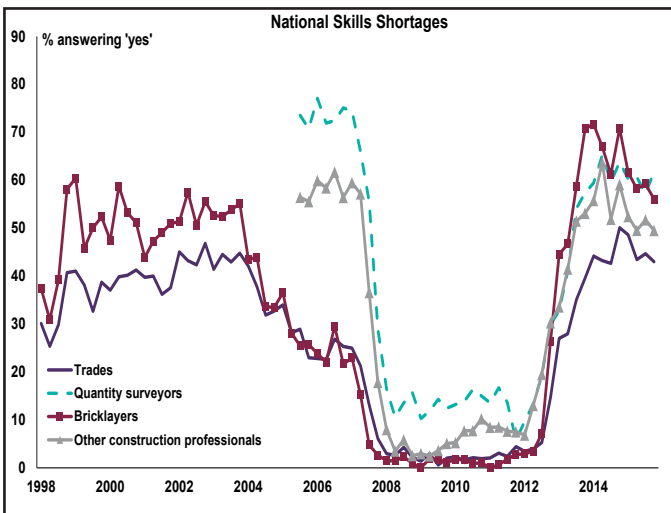
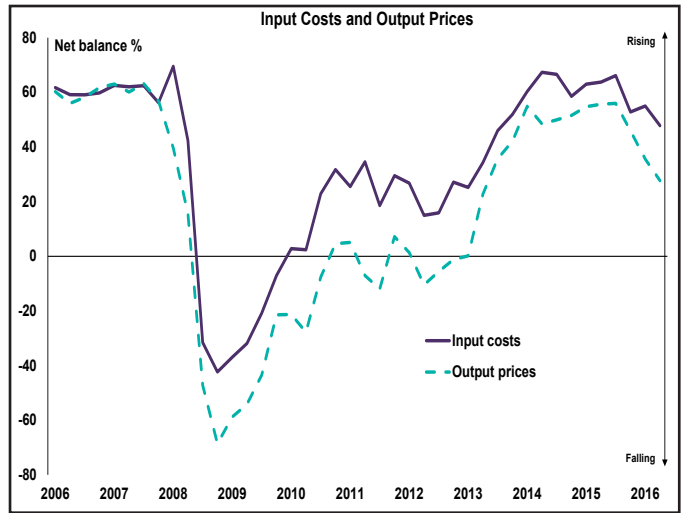
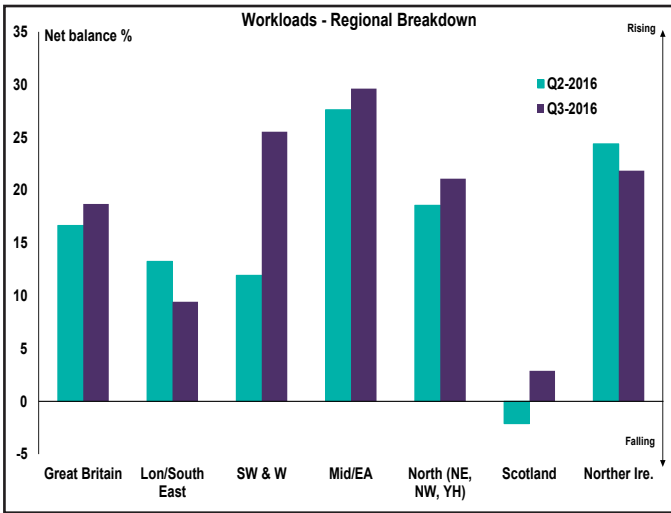
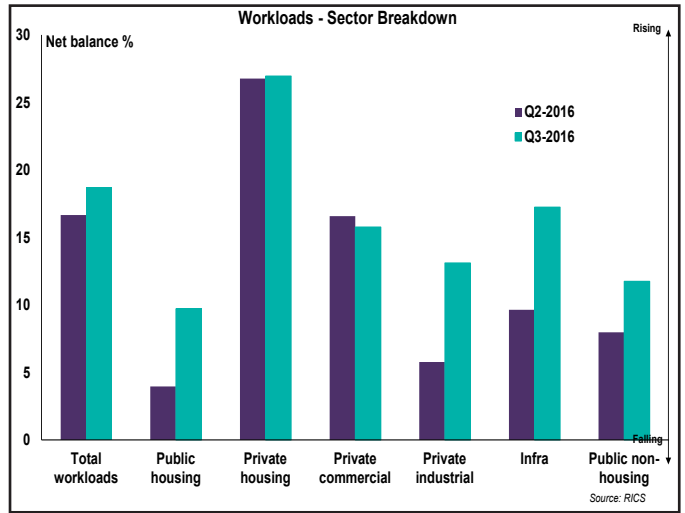
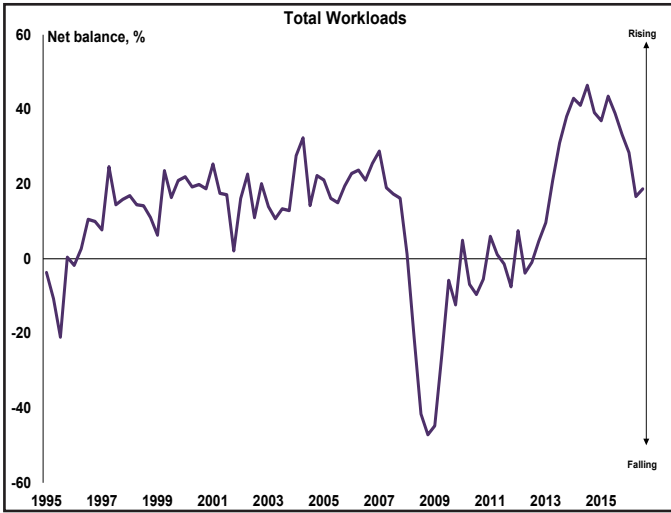
impediment to growth with 69% of contributors reporting such constraints to be holding back growth. Planning and regulatory delays are the next most substantial factor restricting activity with 55% of respondents citing problems in this area.

Growth in output costs rose at a more moderate pace with a net balance of 28% of contributors seeing a rise rather than a fall over the quarter. Meanwhile, input cost continued to increase firmly with a net balance of 48% of respondents reporting a rise.

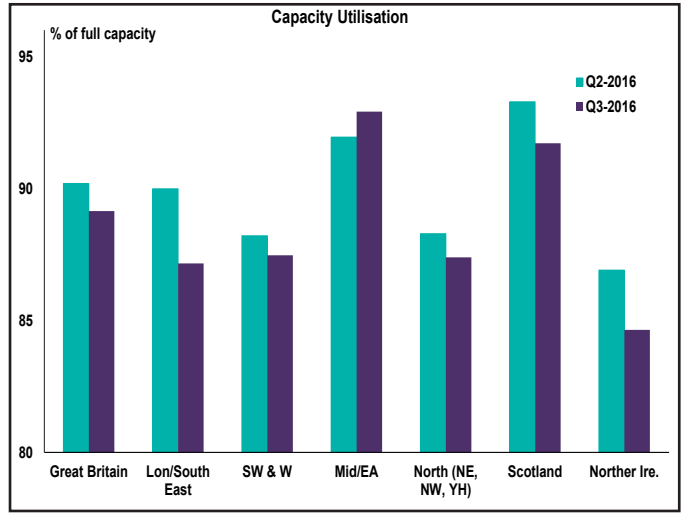
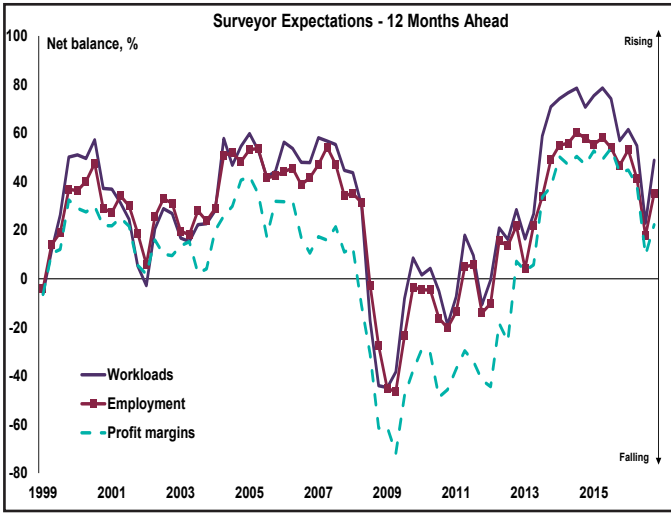
Following the initial shock of the vote to leave the EU, contributors expectations for growth over the year to come have improved relative to the end of June and a net balance of 49% of respondents now forecast a rise in their workloads over the year to come. On average, contributors foresee activity rising by 2.5% over the next twelve months. Meanwhile, expectations for employment growth have also improved somewhat with 35% more respondents forecasting a rise rather than a fall, up from 18% previously. However, both workload and employment expectations are still lower than their pre-Q2 levels and anecdotal evidence from respondents suggests that uncertainty relating of the UK's future relationship with Europe is still causing them concern regarding their future workloads.

At the regional level, while most areas have seen a slowdown in growth over recent quarters, the broad Midlands block remains the driver of activity with a net balance 30% of respondents reporting a rise in workloads. The London/ South East block has seen a sharp moderation in growth due to a slowdown in activity in the private commercial sector. Meanwhile, workloads stayed broadly flat in Scotland for the second consecutive quarter.

National results



National results



Chartered Surveyor market comments

London

Andrew Sharp MRICS, Arcadis LLP, London, 07881354679, andrew.sharp@arcadis.com - Brexit

Bola Abisogun FRICS, Urbanis Limited, London, 020 7608 0808, bola@urbanis.co.uk - Uncertainty around post-Brexit residential demand has quashed market sentiment

Christopher Payne FRICS, Christopher Payne Associates Ltd., London, 01460 242567, mail@cpaltd.co.uk - Funding and planning are the most significant factors affecting our workload.

Dick Kepinski FRICS, ES Moss Ltd, London, 01923 234327, Dick.kepinski@esmoss.co.uk - Strong demand in warehouse/commercial properties.

Harry L Davies FRICS, Harry Davies Consultant QS, Stanmore, Middlesex, 02089585243, harrydavies@f2s.com - More residential improvements than new build.

Mark Williams MRICS, Mace Cost Consultancy Limited, London, 020 3522 3000, mark.williams@macegroup.com - The effects of Brexit, whilst still unclear, are having a negative impact on the London commercial office sector.

Nigel Bellamy MRICS, 8build Limited, London, 0207 710 4488, n.bellamy@8build.co.uk - Continued increase in business confidence after Brexit, getting better every week.

Paul French MRICS, Set Square Surveyors, London, 020 7375 6390, paul.french@setssquaresurveyors.co.uk - The ability to recruit good quality property professionals to service growing workloads continues to be challenging.

Peter Bensted BSc MRICS, Fenton Associates, London, 02032145000, peter@fentonassociates.co.uk - Access restrictions.

Richard Petterson MRICS, Hother Associates LLP, London, 02089477999, rpetterson@hother.co.uk - Brexit had a short

term effect on some sectors, a more lasting effect is yet to be understood.

Richard Saxon FRICS, Consultancy for the Built Environment, London, 020 7585 1976, richard@saxoncbe.com - Uncertainty about housing policy.

South East

A Forbes MRICS, Forbes Associates, Saffron Walden, 01799 527700, info@forbesassociates.co.uk - Brexit.

Christopher Smith FRICS, Christopher Smith Associates, Kingston upon Thames, 020 8943 2157 - Still considerable doubt over effect of Brexit. Time from project conception to start on site seems to get ever longer.

Jason Farnell FRICS, Commercial Risk Management Limited, London, 01442 270643, jason.farnell@commercialrisk.management - There is an over-exposure to residential and accommodation projects, particularly in the conversion of commercial space.

Olunmi Odeleye MRICS, Instalcom, Borehamwood, 07960168022, olunmi6@aol.co.uk - Currently involved in framework providing infrastructure, over-spend last year is affecting successful tenders.

Robin Goddard BSc FRICS, Brodie Plant Goddard, Dorking, 01306 887070, robin.goddard@bpg.co.uk - The market has stagnated in the last three months and although instructions are still coming in, the post-summer rush has not materialised in the same way as previous years. Tender levels are still surprisingly low.

North East

Charles Laidlaw MRICS, CL Cost Consultants Limited, Newcastle Upon Tyne, 01912737796, charleslaidlaw@clcostconsultants.co.uk - Lack of confidence

Ian Millar MRICS, Ian Millar Cost and Contract Consultancy, Newcastle upon Tyne, 0191 2863889, ian@immccc.co.uk

- Due to the way university courses are now structured in surveying generally, but specifically in quantity surveying, graduates need training in basic skills before they become productive, fee earning members of a team.

John Weddell MRICS, Gardiner and Theobald, Newcastle upon Tyne, 0191 2321328, johnweddell@fsmail.net - Post-Brexit referendum economic uncertainty.

Marcus Lidster MRICS, Mulgrave Estate, Whitby, 01947 893239, marcus.lidster@mulgrave.net - Planning policy.

North West

Antony John Butterfield MRICS, Arcadis, Manchester, 07917307787, antony.butterfield@arcadis.com - Manchester's development is hampered by poor communication networks.

Brian John Boys MRICS, B&E Boys Limited, Rossendale, Lancashire, 01706 211 368, john.boys@beboys.co.uk - Labour supply (skilled trades) is impacting upon project delivery. There has been a noticeable improvement upon residential sales and available schemes. Well run small medium sized businesses are looking to invest in their premises/buy new/improved buildings.

Christine Kennedy MRICS, Weaver Vale Housing Trust, Northwich, 01606 813482, christine.kennedy@wvht.co.uk - Government enforced rent reductions are continuing to impact on available funds.

Les Yates AssocRICS, Les Yates Surveys Ltd, Warrington, 07816245252, lesyates9@gmail.com - Potential shortage of raw materials. Brick plant mothballed.

Richard Barnes FRICS, The Vinden Partnership, Manchester, 01204 362 888, rbarnes@veritassurveying.co.uk - We have seen a significant reduction in the number of contracts issued to subcontractors since April 2016, perhaps influenced by the effects of Brexit and or the summer holidays.

Robert Collier MRICS, One Manchester, Manchester, 01612775852, bobcol_98@yahoo.com - Availability of land.

Yorkshire and Humber

Conrad Canadine MRICS, University of Leeds, Leeds, 0113 3435955, canadine@ymail.com - Lack of investment - questions over the northern powerhouse following the change in PM.

Daniel Habe AssocRICS, Engineering Services | ISG, Leeds, 07583 681 485, Daniel.Habe@isgplc.com - The scaremongery and bias in the corporate media concerning Brexit.

David Bishop, MRICS, DBA Project and Cost Consultancy Ltd, Doncaster, 01302 719919, enquiries@dbamanagement.co.uk - Utilities remain a key factor in risk and timely delivery.

Mark Denton MRICS, Auburn Ainsley Ltd, Sheffield, 01709 382322, m.denton@auburnainsley.co.uk - Public sector organisations appear to be either reducing capital expenditure, delaying capital planning and delivery within the financial year, or taking longer than anticipated to process funding applications.

Michael Stewart MRICS, Babcock Group, Sheffield, 07957180338, mike.stewart@babcockinternational.com - We work in a niche market, electricity transmission, the market is buoyant but very competitive.

Neil Burgin MRICS, Sheffield Hallam University, Sheffield, 07597224880, n.burgin@shu.ac.uk - Brexit has affected the higher education sector due to uncertainty over overseas students and research funding.

Paul Walker MRICS MAPM MCI Arb, Twoplustwo Commercial Services Limited, York, 07901000393, paul@two-plus-two.com - A pipeline of infrastructure works is flowing slowly. Brexit impact continues to remain a hot topic of discussion. HS2 and Hinkley are eagerly awaited.

Chartered Surveyor market comments

South West

Alex Rapley MRICS, Ridge and Partners LLP, Bristol, 01275813500, arapley@gmail.com - Strong competition on fees from other consultancies and contractor frameworks sidelining consultancy services.

David Perry MRICS, Wm G Weller & Son Ltd, Redruth, 01209 215621, david@wmweller.co.uk - Tender prices continue to increase above the regional average due to the unavailability of skilled labour.

David Wheeler FRICS, DW Associates Compliance Audit, Appledore, 01237424245, wheelerman@mac.com - Off the beaten track.

Douglas Lloyd MRICS, Kier Construction Limited, Plymouth, 01752 642700, doug.lloyd@kier.co.uk - Uncertainty of demand.

John Mullen MRICS, John Mullen Building Surveying, Bath, 01225447108, john@johnmullenbuildingsurveying.co.uk - Hinkley point development.

Mark Cox, Cox Developments, Plymouth, 01752 719035 - Financial constraints are still an issue.

Paul Yandall Bsc(Hons) MRICS, Torbay Development Agency, Torquay, 01803 207950, paulyandall@fsmail.net - Torbay is historically a tourist area so encouraging other industries requires a large amount of effort. The new link road from Newton Abbot to Torquay is anticipated to help bring new investment into the area.

Steve Willington, Goadsby (Survey & Valuation) Ltd, Bournemouth, 01202 550000, steve.willington@goadsby.com - Not enough mid size contractors.

Wales

Alan Davies MRICS, Wynne Construction, Bodelwyddan, 01745 586666, alan.davies@wynneconstruction.co.uk - Basic skills shortage.

Howard C Stein MRICS, Howard C. Stein MRICS Chartered Quantity Surveyor, Wrexham,

01978 842453, howard.stein@talk21.com - Tendering pressure on contractors from Irish firms.

Lee Bishop MRICS, Chessmann, Cardiff, 02920732355, lbishop@chessmann.co.uk - Welsh Assembly Government reluctance to engage with the private sector.

Mark Davies MRICS, M S Davies Ltd, Cardiff, 07917434988, mark.davies@msdavies.co.uk - During the last year three key projects have been delayed within the S Wales /S West area - Hinkley Point, Ebbw Vale Race track and the Swansea Barrage. Rail has also under delivered. Cardiff is an expanding city with this success requiring houses.

Mark Downer MRICS, WYG, Mold, 01352 706207, mark.downer@wyg.com - We continue to remain busy with a number of new Healthcare Schemes in particular and we note a steady demand for consultant fee bids

Nicholas Marrs MRICS, NMM Associates Ltd, Holywell, 07979497988, nickmarrs1@gmail.com - Lack of government energy policy regarding CfD.

T H Fountain FRICS, T H F Building Surveyors Ltd, Harlech, 0780900000, tomf2000@aol.com - Lack of structural engineers.

West Midlands

Andrew Dixon MRICS, Willmott Dixon, Birmingham, 01675467666, andrew.dixon@willmottidixon.co.uk - HS2.

FRICS, Cushman & Wakefield, Greater Birmingham, 0121 697 7222, andy.irvine@cushwake.com - Fall out from Brexit still creates uncertainty and whilst sentiment probably better than expected, the full impact of Article 50 will not feed through for sometime yet and markets don't like uncertainty!

Garrie Weatherley MRICS, DBK Partners Ltd, Birmingham, 0121 622 8520, Gweatherley@dbkltd.com - Question marks still remain over funders attitudes to investment.

Phil Hodges, Ridgeways,

Birmingham, 01527894514, pjil@ridgewaysqs.co.uk - Mixed messages continue. Some clients push on with major developments (housebuilders) while others hold back, concerned with financial market jitters. Some contractors at full capacity, others now concerned over lack of tenders coming through.

Stephen Joyce MRICS, Network Rail, Birmingham, 01213453000, steve_joyce@hotmail.com - European directives.

Tracy Markham FRICS, TM Building Surveyors, Balsall common, 07739721072, Tracy@tmbuildingsurveyors.co.uk - Lack of property for sale.

East Midlands

David Morris BSc MRICS - Director, Tompkins Robinson Surveyors, Wellingborough, 01933 223307, davidm@tompkinsrobinsonsurveyors.co.uk - Concern over shortage of good quality trainees/graduates and difficulty is attracting people into industry.

Emily Powell MRICS, Wheelon Brothers Ltd, Derby, 01332388400, emily.powell@wheeldon.co.uk - Regulation and lack of planners in the local area slows developments.

Paul Meadows MRICS, Salus Approved Inspectors, Leicester, 0333 800 5678, Paul.meadows@salusai.co.uk - Whilst we are all a little unsure about the long term effect of Brexit, there is still considerable work being undertaken in the UK, it's a real shame that some are prepared to still lower their professional fees to that of a below professional rate.

Eastern

Assoc. RICS, SEH Ipswich Ltd, Ipswich, 07831595543, seamus.mcevoy@sehipswich.co.uk - Brexit.

Chris Keeble DipProjMan MRICS, Gill Associates, Ipswich, 01473 214646, ckeeble@gillassociates.co.uk - Increasing workload and optimism now Brexit memory has passed.

Douglas Beckwith FRICS, Beckwith Mediation LLP, Cambridge, 0203 507 0371, douglas@beckwithmediation.com - Disputes appear to be more keenly fought and taking on a personal nature at times.

Jonathan Nelson FRICS, AECOM, Norwich, 01603953024, jonathan.nelson@aecom.com - Private resi pushing on while other sectors moving at a slower pace.

Raymond Burch FRICS, Marstan BDB, Cambridge, 01799 531 251, ray.burch@marstanbdb.com - Signs of Brexit knock on effects being seen in high London residential schemes - beyond that sector clients currently seem indifferent to the referendum result.

RJ Franklin MRICS, Robinson & Hall LLP, Bedford, 01234 352201, rjf@robinsonandhall.co.uk - The long lead-in time we are experiencing for certain materials and products is making project managing jobs extremely challenging at the moment.

Saul Humphrey MRICS, R G Carter, Norwich, 01603867355, Saul.humphrey@rgcarter.co.uk - Brexit uncertainty.

Scotland

Alan Archibald MRICS, Balmoral Group Holdings Ltd, Aberdeen, 01224 859068, a.archibald@balmoral.co.uk - Oil price.

Brian Donaldson MRICS, Thomas and Adamson, Edinburgh, 0131 225 4072, brian.donaldson@thomasandadamson.com - Uncertainty in funding brought about by Brexit and talk of second independence referendum.

George Mackie MRICS, Ogilvie Construction Ltd, Stirling, 01786 812 273, george.mackie@ogilvie.co.uk - There still appears to be uncertainty in certain sectors following Brexit and the changes to the Scottish government budget funding model could further compound this with an effect on future projects.

Stephen Daniels MRICS, MB Langmuir & Hay (UK) Ltd,

Chartered Surveyor market comments

Glasgow, 01413326266, stephen.daniels@langmuirandhay.com - Competitive market operating on tight margins. Labour shortages impacting on projects leading to delays.

T McQuade MRICS BSc, Morham & Brotchie, Oban, 01631 563721 - Keen bidding continues to reach new lows. Fee bids are winning work at 25% of the average rate.

Northern Ireland

Adrian Petticrew MRICS, McNicholas Construction Services Limited, Belfast, 02890834101, adrian.petticrew@mcnicholas.co.uk - Both private and public demand remains depressed. Most large contractors are having to work outside of Northern Ireland to survive and thrive.

Andrew McKeown MRICS, Turner & Townsend, Belfast, 028 90446999, andrewmckeown58@hotmail.com - The local government not approving projects is having an effect on the local economy.

Donal Lynch MRICS, Lourne Construction Ltd, Londonderry, 028 71 882343, donal@lourne.com - Border with EEC.

Eugene Coyle MRICS, Coyle Doherty & Company, Derry, 028 7137 1826, eugene@coyledoherty.com - Indecision by civil servant delays construction projects starting e.g. the length of time to obtain planning permission for developments is out of line with the rest of the UK, indecision by funding bodies is hindering developers.

Gareth Lyons MRICS, Rainey & Best, Belfast, 02890239499, gareth@raineybest.com - Access to sites due to poor infrastructure.

George Williamson MRICS, Brian Canavan Associates, Coleraine, 028 703 58484, geordiewilliamson@hotmail.com - Financial institutions are still reluctant to lend on residential projects.

James Sammon FRICS, Sammon, Belfast, 028 9024 9800, j.sammon@sammon.eu -

Public sector under-investment in infrastructure and Brexit is hampering private sector investment.

Kerr Houston MRICS, Johnston Houston, Belfast, 02890330133, kerr.houston@johnstonhouston.com - Brexit impacts remain a concern to private sector confidence in the NI market, particularly in light of pre-Brexit corporation tax plans. Clarification around NI Investment Fund also required to stimulate investment.

Mark Lynch MRICS, TMV Consultants, Newry, 02830269145, marklynch@tmvc.co.uk - Consumer confidence is still fragile and the un-proven negative media drive behind the likes of Brexit hasn't helped. The majority of our workload still extends beyond the shores of Northern Ireland and we can't envisage that changing imminently.

Wm J Garfield Armstrong, RJ McKelvey Ltd, Belfast, 028 8167 0586, garfieldarmstrong@mac.com - The current competition is quite high - PQQ qualifications are hard to attain.

Chartered Surveyor market comments

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Notes to editors

About:

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

Total contributions in Q2 2016=341

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:

- How has the level of workloads changed over the last three months (down/up/same)?
- How has the level of new and R&M workloads changed over the last three months (down/up/same)?
- Has your company experienced skills shortages in your region in the latest three months for the following areas?
 - How have input costs changed over the last three months? (down/ same/ up)
 - Of which: labour costs/material costs? (down/same/up)
- How have output prices changed over the last three months? (down/ same/ up)
- Have any of the following factors impacted building activity over the last three months? (yes/no)
- What are your company's approximate expectations in each of the following areas over the next twelve months?(% change in levels for workloads and employment, % points for margins)
- At what capacity is your company currently operating - as a % of full capacity? (down/ same/ up)
- Which infrastructure subsector will see the strongest growth over the coming 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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