Q3 2017: RICS UK Construction and Infrastructure Market Survey

Growth in workloads stable despite intensification of labour shortages

- Workloads continue to rise moderately in Q3
- Rail and energy set to be the fastest growing infrastructure subsectors over the next twelve months
- Higher input costs and a shortage of labour restrict growth in profit margins

The results of the Q3 2017 RICS Construction and Infrastructure Market Survey show a broadly steady pace of growth relative to the previous quarter with a net balance of 22% of surveyors reporting their workloads to have risen. While activity remains in-line with the average of the past four quarters, comments left by respondents continue to highlight Brexit-related uncertainties as weighing on investment decisions.

The net balance of respondents reporting a rise in activity improved slightly in the public and private housing sectors, to 12% and 33%, respectively, while remaining broadly stable elsewhere. Although unchanged at +20% in Q3, the current pace of expansion in private commercial sector activity is much more modest than the average over the prior three years. Meanwhile, the public non-housing sector continues to underperform all others.

In infrastructure, 21% more contributors reported a rise rather than a fall in workloads. Nationally, respondents expect the rail and energy sub-sectors to post the most significant increases in construction output over the coming 12 months.

Higher input costs and a shortage of labour continue to restrict growth in profit margins, with a net balance of only +12% of respondents expecting a rise in margins over the coming year. This is likely to have impacted tender pricing as well, with 62% and 56% more respondents in the building and civil engineering areas, respectively, envisaging greater price pressures.

The lack of sufficiently skilled workers remains an obstacle for many businesses. Having eased throughout 2016, the intensification of labour shortages is biting once more with 62% of contributors in Q3 citing this as an impediment to growth. This contrasts with an average share of 40% when data collection first began in 2012. Within this, respondents to our survey are twice as likely to cite a dearth of quantity surveyors as compared to civil engineers. Amongst trades occupations, the recruitment of bricklayers remains the perennial challenge, well ahead of either electricians or plumbers.

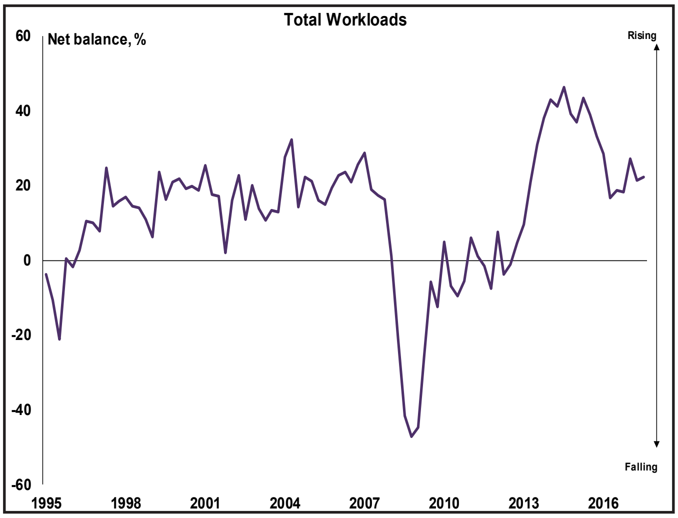
Despite government efforts to bolster the prominence of apprentices through an apprenticeship levy introduced earlier this spring, the effectiveness of workforce development schemes in the UK remain far from clear. While 42% of respondents feel that government-funded programmes are moderately effective, a full one-third are unsure. The quality of the talent pipeline is insufficient as well - less than half (45%) of employers who currently hire apprentices view them as a long-term solution to their hiring needs.

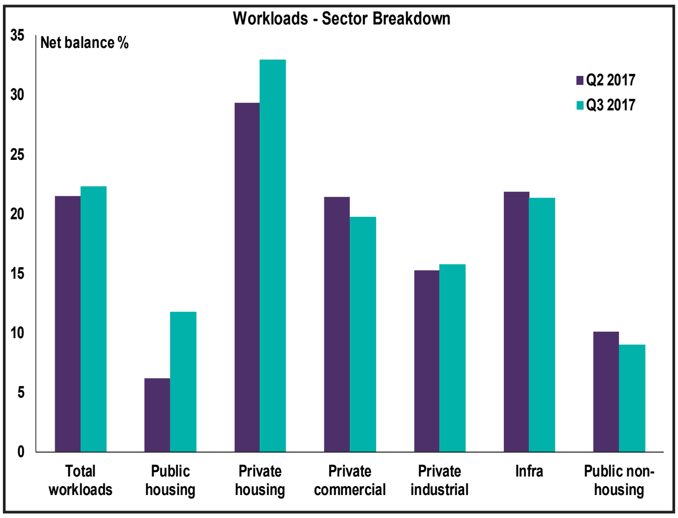
Although financial constraints are still reported to pose the most significant challenge to building activity, the share of contributors expressing this view has come down to 69% (from 79% in Q2) bringing it in-line with the five-year average. Access to bank finance and credit remains by far the most frequently cited factor, followed by issues related to cash flow and liquidity. This likely reflects a more cautious stance by banks given cyclical market conditions and Brexit considerations.

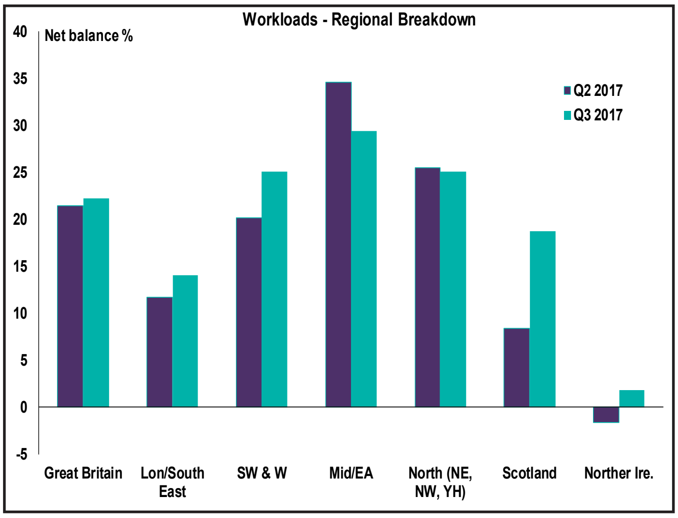
Despite these uncertainties, a net balance of 45% of respondents expect activity to rise rather than fall over the next twelve months. Nevertheless, this is down from the four quarters immediately preceding the EU referendum, which averaged 62%, reflecting a somewhat less optimistic outlook for the sector over the year ahead. Meanwhile, 30% more contributors expect employment to rise rather than fall (broadly unchanged from Q2); sentiment was least positive in Scotland and Northern Ireland.

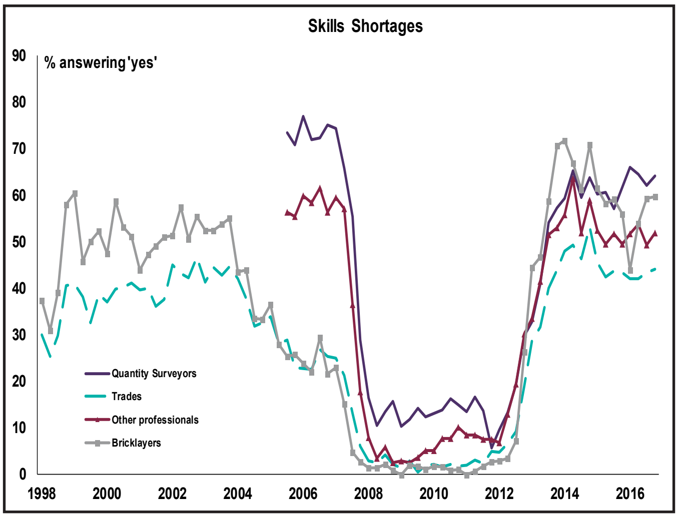
In terms of geographical breakdown, workloads are now reported to be increasing across all regions, although only modestly so in Northern Ireland. Over the past year or two, the momentum of growth in infrastructure activity has slowed noticeably in Scotland and the North West. By way of contrast, the pace of expansion within this sector has continued unabated in the Midlands and Wales. Elsewhere, private industrial workloads in the South East were reported to have fallen for the second consecutive quarter albeit only marginally, with a net balance of -7% in Q3; in London, activity rose in this sector for the first time in a year.

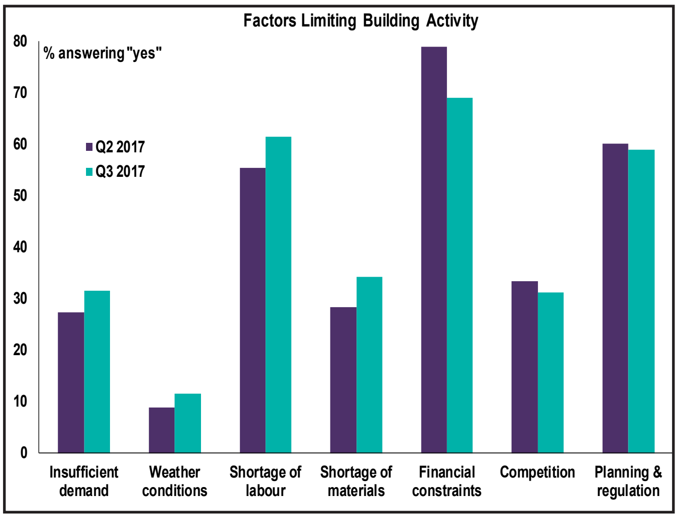
Key indicators

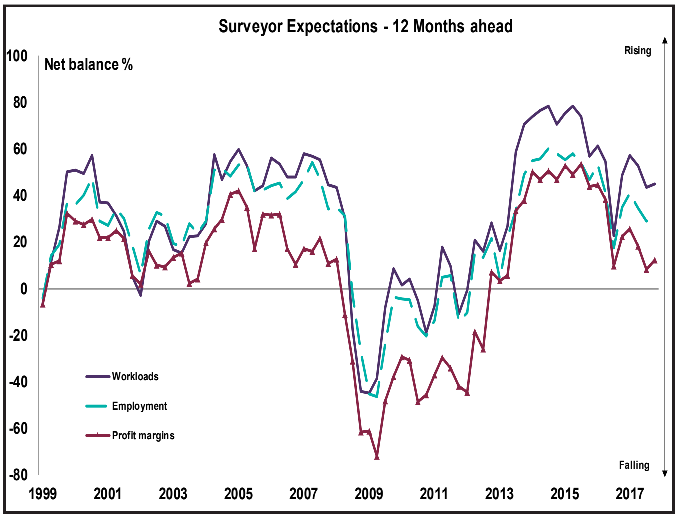












Chartered Surveyor market comments

London

Abolade Abisogun FRICS, London, Urbanis Limited, bola@urbanis.co.uk, 020 7608 0808 - Increasing uncertainty is being reflected in protracted, ill-defined procurement processes.

Andrew Bridson MRICS, Berkhamsted, Skanska, andrew.bridson@skanska.co.uk - Skanska UK have recently secured some of the initial tranches for HS2. This will inevitably put a significant strain on our own current Professional resources with regards to Infrastructure / Rail Engineers, QS's and Construction Managers.

Antony Barnes, London, Multiplex Construction, antony.barnes@multiplex.global, 07841 036709 - There is an insufficient number of apprentices available for our supply chain to employ.

Chris Mills FRICS, Wrotham, Kent, Chris Mills Consulting Limited, chris@chrismillsconsulting.co.uk, 07813036395 - Biggest problem is the uncertainty about Brexit and whether EU Citizens will be able to stay here. Many mid European labourers have already left the UK. This will continue. Skill shortages are becoming critical and British nationals have not come in.

Guy Solway, London, Faithful + Gould, guy.solway@fgould.com, 07740922923 - BREXIT and the potential effect on the market and the labour and supply chain.

Hugh Cross, London, Hugh Cross, hugh@hill-cross.com, 0780 193 1721 - Reduced demand and financial constraints mainly as a consequence of Brexit.

James Amoako, London, Faithful & Gould, jk2a@yahoo.co.uk, 07940436870 - I believe uncertainties over Brexit is holding back investment decisions by funders.

Mark Samuels MRICS, London, Simply Surveying, msams5@hotmail.com, 07951019839 - Brexit is causing a lot of uncertainty in the industry.

Martin Lane, London, Peter W Gittins & Associates Ltd, martin@petergittins.co.uk, 02031852088 - Lack of confidence as a result of Brexit referendum and the difficulties being experienced in the Brexit negotiations.

Nitin Boodhun MRICS, London, Arcadis LLP, nitin.boodhun@arcadis.com, 07825755645 - Geopolitical uncertainty on the Brexit issue.

Oliver Cousins, Leighton Buzzard, Cumming Europe, ocousins@ccorpintl.com, 02074902300 - Brexit - we undertake projects in Europe and we expect the on-going uncertainty to impact on this workstream in the next 12 months.

Olubunmi Odeleye MRICS, St Albans, Instalcom, olubunmi6@aol.co.uk, 07960168022 - My company is in framework with a major utility provider and tender and secure work regularly with others; work has been regular. We have not experienced any backdrop due to Brexit.

Richard Diamond AssocRICS, London, Diamond Resolution Consultants Ltd, jrdinuk@gmail.com, - Too much talk of skills shortages pushes incompetent people up the salary bracket by constantly moving companies. New apprentices don't come equipped with basic computer (MS Office or similar) knowledge making their industry training slow.

Richard Petterson MRICS, London, Hother Associates LLP, rpetterson@hother.co.uk, 02089477999 - A lack of senior experienced site managers and surveyors is having an inflationary effect.

Simon Rawlinson MRICS, London, Arcadis, simon.rawlinson@arcadis.com, 07715759997 - Delays associated with the procurement process - reaching agreement on 2-stage or, in extreme cases, 1st stage contractor being dismissed.

Tim Walder, London, Arcadis, tim.walder@arcadis.com, 07979244789 - Airports are not highlighted in this survey. There is substantial growth in airport capacity programmes: Manchester, Stansted, London City and Gatwick Airports. Birmingham will be next and there continues to be growth at Heathrow.

South East

Andrew Moulsdale FRICS, Newmarket, BS Initiative Ltd, adm@bsinitiative.co.uk, 07825700461 - Professional labour shortages.

Christopher Wood MRICS, Huntingdon, Christopher Wood, christopher.wood@mickgeorge.co.uk, 07907 558128 - Demand on the local industry has grown due to recent large infrastructure projects. Cambridge continues to grow in relation to demand on the industry.

Harry Scarff, London, Cornerstone Assets, Harry.scarff@cornerstoneassets.co.uk, 07917326330 - Hesitation over the outcome of Brexit has been a significant factor in decision making for investment and long term planning.

Jonathan Leeding MRICS, Cambridge, Faithful+Gould, jonathan.leeding@fgould.com, 01223 814024 - BCIS's all-in TPI isn't reflective of local market conditions experienced in Cambridge.

Keith Gale MRICS, Winchester, Hampshire County Council, keith.gale@hants.gov.uk, 01962 847271 - We have developed the Degree Chartered Surveyor Apprentice initiative to grow a professional skill base and encourage the next generation of surveyors.

Mark Phillips MRICS, Ipswich, ELLISTON STEADY & HAWES LTD, mark.phillips@eshbuilding.co.uk, 07973824992 - There is a lack of confidence in the market place.

Peter Hutley, Chelmsford, Anderson Group, Peter.hutley@me.com, 07738705072 - Planning delay in agreeing a scheme that is viable and deliverable.

Robert Kevin Smith MRICS, Caversham, FW6064 Limited, Robsmithqs@gmail.com, 07917 607 532 - Poor planning, surveying & design prior.

Tim Barlow MRICS, lONDON, Network Rail Infrastructure, timb605@gmail.com, 07766207953 - Please note that this survey has been completed for the section (Infrastructure Projects - Signalling Southern) that I work within and as such may not reflect the wider status across the business.

North East

Charles Laidlaw, Newcastle upon Tyne, CL Cost Consultants Ltd, charlesglaidlaw@clcostconsultants.co.uk, 01912737796 - Brexit will have a negative effect.

Peter Carruthers, Newcastle upon Tyne, Summers Inman Construction & Property Consultants, peter.carruthers@summers-inman.co.uk, 01912841121 - Demand for new homes remains high. Contractors are able to pick and choose opportunities in a buoyant north east market.

Stephen Whaley FRICS, Durham, Northumbrian Water Limited, stephen.whaley@nwl.co.uk, - Need to keep the pressure on UK government to deliver on regional infrastructure schemes.

Chartered Surveyor market comments

North West

Darren Hurst, Manchester, AA Projects Ltd., darrenhurst@aaprojects.co.uk, 01619737410 - Currently there is a shortage of experienced flat roofing contractors and the net result has been an increase in tender priced returns for large flat roofing projects in the public sector.

Tim Lambourne MRICS, Lymm, Cheshire, Lambourne Associates Ltd, Tim.lambourne@hotmail.co.uk, 07843 282007 - Currently working in the Nuclear sector and it's relatively buoyant at the moment. Some of the above questions are not appropriate to this particular industry.

Yorkshire and Humberside

Andrew Middleton, Sheffield, Costain, david.middleton1310@btinternet.com, 07824 303455 - Uncertainity due to Brexit & like.

John Elliott FRICS, Huddersfield, john elliott surveyors, johngcelliott@sky.com, 01484864622 - Delays in the planning process.

Mi, Sheffield, Babcock International Group, mike.stewart@babcockinternational.com, 07957180338 - There are a lot of projects being planned but few seem to obtain financial commitment.

Rod Appleyard, Bingley West Yorkshire, Verification Associates, vassc@aol.com, 07785232934 - There is a definite difference in construction activity between the north and south which is reflected in the need from industry to grow.

South West

Chris Barrow, Chippenham, Ministry of Defence, chrissy.barrow@talktalk.net, 07974 431358 - Competition from major projects.

David Partridge MRICS, Taunton, Summerfield Developments SW Ltd, dpartridge@summerfield.co.uk, 01823257961 - Currently workload is fairly buoyant in the South West and we are operating well. We expect similar conditions to exist for the next 12 months. Brexit may be an issue but no adverse effects in the South west so far!

Malcolm White, EXETER, The Robinson White Parnership, malcolmwhite@robinson-white.com, 01392824444 - Finance does not seem to be an issue at present. Getting developers to propose a properly considered investment plan is a bigger problem.

Michael Riley, Taunton, Michael Riley Associates, mriley@ricsonline.org.uk, 07776130999 - HINCKLEY POINT NUCLEAR power station is pushing up prices and causing shortages of professionals and tradesmen alike.

Steve Nightingale, Bath, Bloq Management Services Limited, steve@bloqmanagement.co.uk, 07825612188 - Planning system needs overhaul, and a council house building programme is vital to address housing shortage.

Wales

Andrew Banfield MRICS, Swansea, Interserve, andrew.banfield@interserve.com, 01792464001 - Lack of and delays to publicly-funded projects.

Anna Roberts MRICS, Anglesey, A Roberts Ltd, anna.roberts@arobertsltd.com, 07527546134 - Lack of Tier 2 main contractors. Unwillingness of sub-contractors to work with large contractors. Ability for large contractors to pick their projects and opt for negotiated contracts rather than competitive tendering.

David James, Cardiff, MJB Asociates, david.james@mjb-associates.co.uk, 02920 166095 - We are a small practice relying mainly on Contractors BOQ's for education projects and grant work with some ongoing education and maintenance projects. The Contractors BOQ's and grant work are very difficult as they are impossible to forecast.

Gareth John Davies MRICS, Llanelli, Total Quantity Surveying Ltd, total.qs@outlook.com, 07468576277 - There is an uncertainty surrounding Brexit and the likely effects on the economy and in particular interest rates.

Mark Downer MRICS, Mold, WYG, mark.downer@wyg.com, 01352 706207 - Similar to the previous quarter. We remain busy with public sector works. We have noted some of these projects have been placed on hold due to funding issues. Still optimistic regarding workload over the next 6-12 months.

Nicholas Jones, Wrexham, Wrexham County Borough Council, nic.jones@wrexham.gov, 01978 315456 - Hesitancy to invest due to Brexit.

West Midlands

Andy Irvine, Birmingham, Cushman & Wakefield, andy.irvine@cushwake.com, 0121 697 7222 - Overall business sentiment is relatively flat; there is always a new factor (or a different slant on an old theme) which potentially stifles confidence to expand .

David Shakeshaft MRICS, Birmingham, Constructing Systems Limited, dshakeshaft@csltd.org, 07768600827 - Occupiers cautious in private commercial sector.

Geoffrey William Allen MRICS, Warrington, Interserve Construction Limited, geoff.allen@interserve.com, 07787 753619 - Lack of confidence due to Brexit.. The Government are indecisive and holding back projects due to budget constraints. Outside of London, the main contractors are suffering losses.

Paul Stone ARICS, Sutton Coldfield, Chalcroft Construction, paulstonie@gmail.com, 07527189614 - Brexit uncertainty.

Phil Hodges MRICS, Redditch, Ridgeways Chartered QS, phil@ridgewaysqs.co.uk, 01527894514 - Noticeable increase in the contrast between the levels of activity in key areas of construction work. Future profitability will depend more than ever on the areas of work chosen to remain / become active in.

East Midlands

Abdrew Maude MRICS, Birmingham, Cushman & Wakefield, andrew.maude@cushwake.com, 07771 604573 - Sourcing good quality contractors providing good value.

Adrian Cox CEnv., FRICS, FCIOB., Newark, Nottinghamshire, Waystone Limited, adrian.cox@waystone.co.uk, 01773524510 - Principle issues are discharge of planning conditions and poor Local Authority processes.

David Morris MRICS, Wellingborough, Tompkins Robinson Surveyors, davidm@tompkinsrobinsonsurveyors.co.uk, 01933 223307 - Strong social housing workload, coupled with commercial sector is keeping the Practice very busy. Recruitment is an on-going concern.

Paul Meadows MRICS, Leicester, Salus Approved Inspectors, Paul.meadows@salusai.co.uk, 07900 694638 - We would very much encourage fiscal stimulants that support small business in terms of trading apprentice through to career diversion. This country has a very concerning skills gap in so many parts of construction. This, for me, is the big solution.

Peter Chappell MRICS, Nottingham, Faithful+Goiuld, pchapell@callnetuk.com, 07803259072 - Availability of land in the right place and at right price.

Chartered Surveyor market comments

Richard Morris, Derby, Richard Morris Associates, richard@rmauk.co.uk, 07931 388863 - Largely planning but also approvals for roads and sewers.

Timothy Bizabani, Northampton, Costain, tbizabani@gmail.com, 07825017995 - Survey is based on my own personal opinion which might not necessarily reflect my company's view or position of the same matters.

East Anglia

Barry Wise, Ipswich, Breheny Civil Engineering Ltd, b.wise@breheny.co.uk, 07967 393213 - Brexit.

RJ Franklin MRICS, bedford, Robinson & Hall LLP, rjf@robinsonandhall.co.uk, 01234 352201 - Lead-in times for contractors commencing projects keeps steadily increasing.

Scotland

Alan Archibald, Aberdeen, Balmoral Group Holdings Ltd, a.archibald@balmoral.co.uk, 01224 859068 - Long term recession linked to oil prices.

Damian Briody, Uddingston, Transport Scotland, damianmbriody@gmail.com, 07860814346 - Lack of competition among Contractors within the Rail Construction industry in Scotland.

David Todd MRICS, Wemyss Bay, KKSL Ltd, todddavid@hotmail.com, +44 7957775092 - Companies are failing to use the massive reservoir of talent in the over 55 age group, most of whom will be retiring soon but at present are looking for employment and unable to secure it due to illegal age discrimination.

Stephen Barker, Helensburgh, Jacobs UK Ltd, stephen.barker@jacobs.com - Brexit.

Northern Ireland

Colin McRoberts MRICS, Holywood, Hastings and Baird, colin.mcroberts@hastingsandbaird.co.uk, 07706067730 - Lack of devolved government. Public funding strangled.

Derek Wilson, Magherafelt, FP McCann, dwilson@fpmccann.co.uk, 028 79642558 - The lack of government funding caused by the non-functioning Stormont Assembly is severely curtailing the civil engineering sector in Northern Ireland at present.

Norman Lambe mrics, Lisburn, Earney Contracts Ltd, norman@earneycontracts.co.uk, 02892638269 - The absence of local government in Northern Ireland is depressing the construction industry and delaying any recovery from the 2008 recession.

robert john allister (FRICS), belfast, hasting and baird, roy.allister@hastingsandbaird.co.uk, 02890426835 - Public sector spend restrictions crippling - no local government executive.

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South East

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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 2017 = 358

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?

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?

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?

10. Do you currently employ or train workers via a formal apprenticeship scheme?

11. What is the main driver of skill shortages?

12. Which policy action would most alleviate labour supply pressures?

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.

With offices covering the major political and financial centres of the world, our market presence means we are ideally placed to influence policy and embed professional standards. We work at a cross-governmental level, delivering international standards that will support a safe and vibrant marketplace in land, real estate, construction and infrastructure, for the benefit of all.

We are proud of our reputation and we guard it fiercely, so clients who work with an RICS professional can have confidence in the quality and ethics of the services they receive.

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