



Q4 2017: RICS UK Construction and Infrastructure Market Survey

Expectations improve despite financial constraints weighing on activity

- Workloads continue to rise at a steady, albeit more moderate pace
- Outlook for workloads and employment growth improves amid ongoing capacity constraints
- Confidence is very low in the Government's national strategy to hit housing target

The results of the Q4 2017 RICS Construction and Infrastructure Market Survey show a broadly steady pace of growth relative to the previous quarter with a net balance of 21% of surveyors reporting their workloads to have risen. Notwithstanding the broadly positive tone to the data, comments left by respondents continue to highlight Brexit-related uncertainties as weighing on investment decisions.

In the final quarter of 2017, output increased across all sub-sectors with both new work and R&M activity rising steadily. For the seventh consecutive quarter, the strongest rise in workloads was reported in private housing. Indeed, 27% more respondents cited an increase rather than decrease in private housing workloads, although the pace of this growth remains relatively unchanged since the EU referendum. A rise was also reported in private commercial workloads, while momentum in industrial activity has been improving somewhat over recent quarters. Meanwhile, public sector workloads are rising at a more modest rate with net balances of 11% and 19% of contributors reporting an increase in public non-housing and housing, respectively. Although the workloads indicator has remained in positive territory across each of these sectors since late 2012, the current pace of expansion is, on average, more subdued than that experienced during 2014 and 2015.

In infrastructure, 18% more contributors reported a rise rather than a fall in workloads. Nationally, respondents expect the rail, energy and roads categories 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 +12% of respondents expecting a rise in margins over the coming year, unchanged from the previous quarter. This is likely to have impacted tender pricing as well, with 56% more respondents in both the building and civil engineering areas envisaging greater price pressures.

Financial constraints, labour shortages and planning delays remain the key impediments to growth with 80%, 60% and 60% of surveyors reporting difficulties with each, respectively. Comments from some respondents suggest that stricter conditions being placed on firms by financial institutions are limiting growth. This likely reflects a more cautious

stance by banks given cyclical market conditions and Brexit considerations.

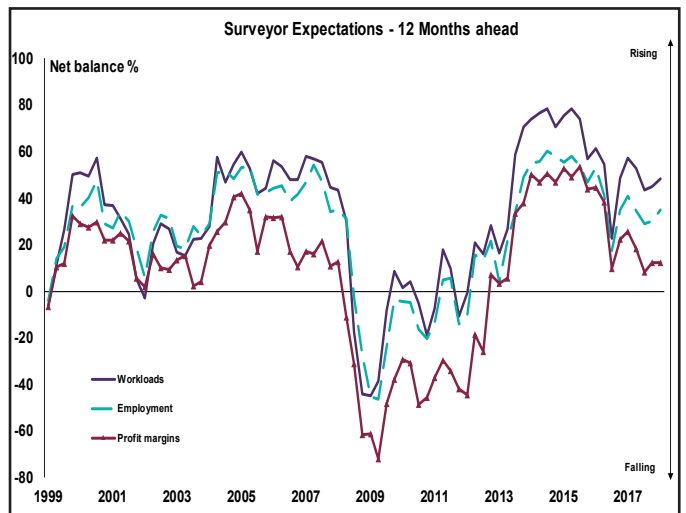
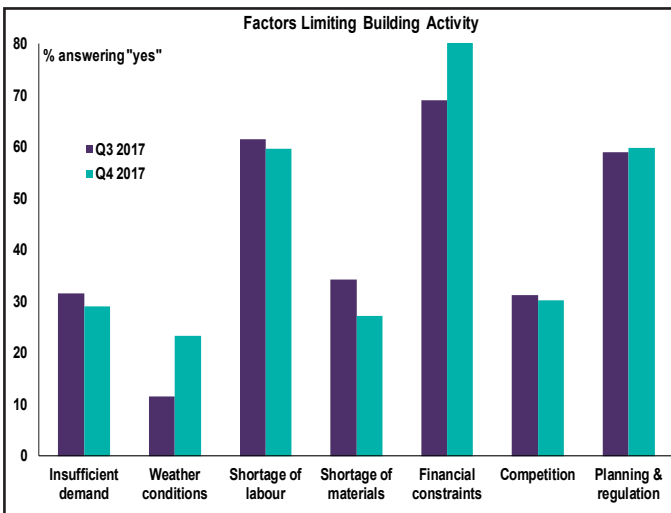
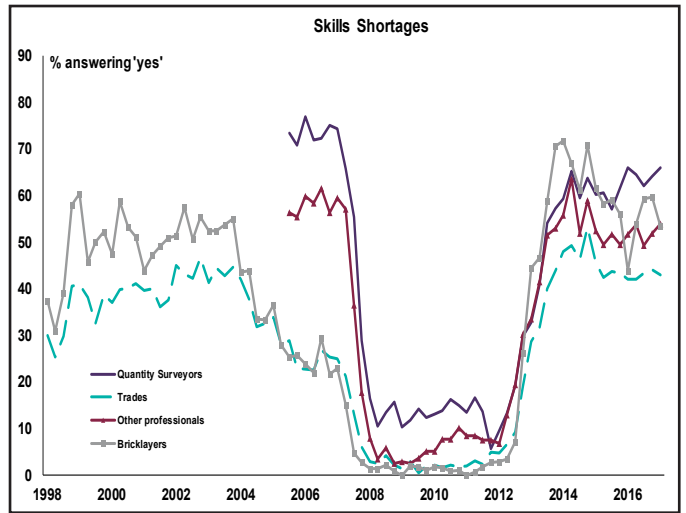
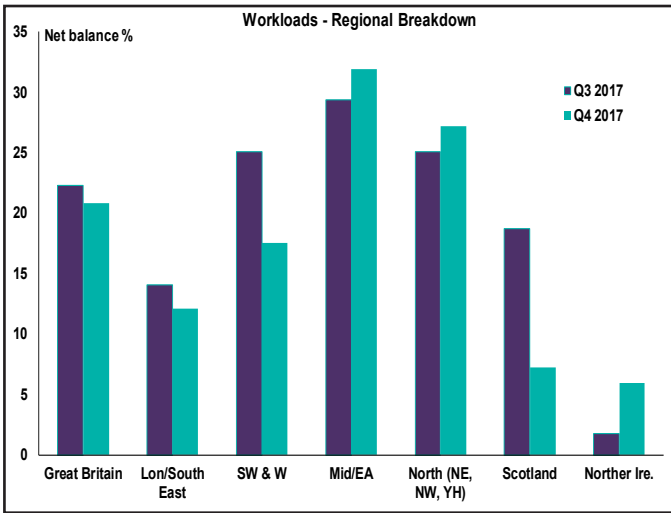
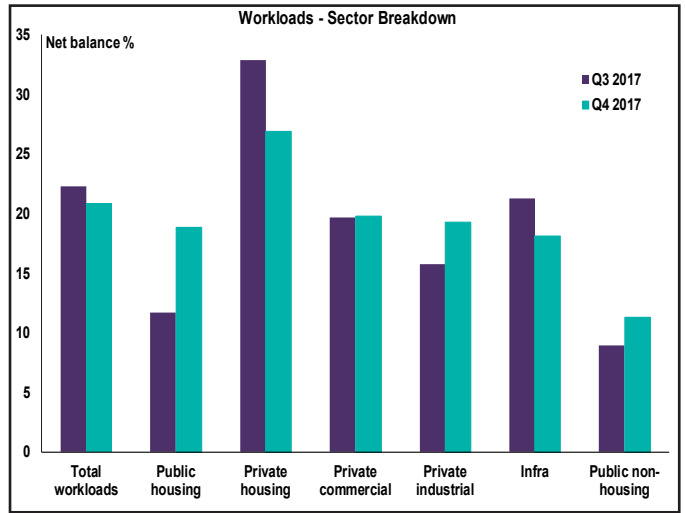
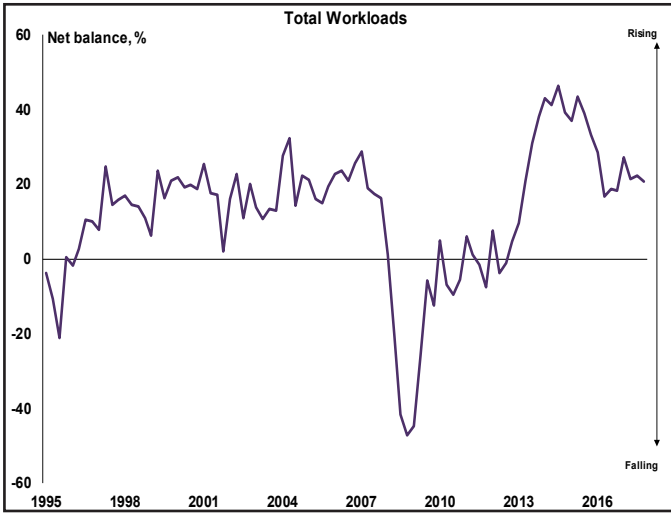
The lack of sufficiently skilled workers remains an obstacle for many businesses, particularly with regard to professional services such as quantity surveying - only in 2007 had the share of contributors highlighting this as a concern been greater. Meanwhile, while just over half of respondents now cite bricklayers as difficult to source (down from 60% in Q3), this role continues to be the most challenging to fill when compared to other trades.

An additional question was also included in the survey to assess how contributors feel about the wide range of policies included in the Autumn Budget and Housing White Paper to lift housing delivery to the government's target of 300,000 per year. Nationally, only 12% of respondents expressed any confidence in the overall strategy succeeding while the remainder were evenly divided between a lack of confidence or being unsure. Specifically, a £1.1 billion fund to unlock strategic sites, including new settlements and urban regeneration schemes, was viewed by far as the most effective policy to boost housebuilding going forward (37%). This was followed by lifting Housing Revenue Account borrowing caps for councils in high demand areas (18%) and adding £2.7bn to the Housing Infrastructure Fund (16%).

Despite the constraints that firms have been facing recently, surveyors remain optimistic about the outlook for the year ahead. Net balances of 48% and 35% of respondents expect workloads and employment levels, respectively, to continue to rise over the coming 12 months. This is the third consecutive quarter that sentiment in both indicators has improved, which is unsurprising given the capacity constraints the sector is still facing.

Workloads are now reported to be increasing across all geographic regions, particularly in the Midlands and North. Over the past year or two, however, the pace of growth in the infrastructure sector has slowed noticeably in Scotland with surveyors now reporting the first decrease in activity since Q3 2016. This has been somewhat offset by an improvement in workloads in Northern Ireland.

Key indicators



Chartered Surveyor market comments

London

Brian Conlon MRICS, London, ARCADIS, brian.conlon@arcadis.com, 07909 682470 - All the initiatives in Q13 need to be improved upon as well as understanding of how to determine what cost / level of homes to build & where and also how to improve off-site fabrication of homes to speed up delivery.

Colin Forster BSc MRICS, London, Neilson Projects, cforster@neilsonprojects.co.uk - We are a small pm/bs practice and therefore not well placed to answer most of your questions. What we do see is a long-term lack of appropriate trade training/apprenticeships for indigenous school leavers - a national scandal.

David Crabtree, Stratford, Crossrail, david@crabtree.com, 07710477412 - Public bodies should be able to deliver the affordable housing. This would mean that they could deliver housing that is fit for purpose and it would unfetter the private sector to deliver housing at a reasonable price point as long as they are not p.

Dean Berry MRICS, London, Cole Management Limited, Dean.berry@colemanagement.com, 07854689718 - Uncertainty surrounding the implications of Brexit and economic conditions and trade deal following the formal exit of the European Union.

James Diamond, London, individual, jrduinuk@gmail.com - Stop companies holding property within 5 miles of the M25 for more than 1 year without submitting planning & a further 6 months for approval. If not completed the land reverts to the government to develop & the owner gets land value paid less costs.

James Knight, London, Arcadis, james.knight@arcadis.com, 07876 396335 - I have commented that I believe that the homebuilders fund will be most effective as this is singularly propping up the new build market currently. Whether this provides the diversity of homes needed is debatable.

Joseph Coyne, London, UK, Turner and Townsend, josephcharteredqs@gmail.com, 07950855268 - Brexit outcome will be a market variable.

Manuela Nearchou MRICS, London, ARCADIS LLP, manuela.nearchou@arcadis.com, 07928572487 - Brexit.

Nicholas Roberts MRICS, London, N J Roberts Design & Build Ltd, nicholas@njroberts.co.uk, 07515719133 - Planning restrictions and inconsistency with the Local Planning Authorities is the main issue affecting schemes. The system needs to be streamlined. The need for new housing and planning policy is required.

Peter Hutley MRICS, Chelmsford, Anderson Group, Peter.hutley@me.com, 07738 705072 - Major delays to bringing forward land is dealing with planning authorities and their lack of response and coordination.

Richard Petterson MRICS, Wimbledon, Hother Associates LLP, rpetterson@hother.co.uk, 02089477999 - Planning approval delays and the effects of Brexit on confidence and the workforce are negatively affecting output.

Simon Rawlinson MRICS, London, Arcadis, simon.rawlinson@arcadis.com, 07715759997 - Increased chance of soft Brexit is encouraging. There are many positive developments on the client side at present - Sector Deal, Project 13, TIP, TIES etc. Perhaps RICS could survey awareness in the next iteration.

South East

Chris Tunbridge, Brighton, BLB Surveyors Ltd, chris.t@blbsurveyors.co.uk, 01273301888 - Clearly the uncertainty regarding Brexit and the effect on foreign investment into the UK has depressed the London market which is having a rippling effect down to the south east. Nervousness breeds nervousness so it spirals down regrettably.

Gary Garnett, Portsmouth, Purkiss Ltd, gary@purkissbuilders.co.uk, 07799114678 - So many tradesmen want to be self-employed very difficult to get young experienced tradesmen who want PAYE employment.

Mark Bristow, Oxford, Bristow Consultants UK Ltd, info@markbristow.co.uk, 07912476636 - Need to stop just giving money or incentives to the big companies.

Patrick Rego, Brighton, BLB Surveyors, patrick.rego08@gmail.com, 01323872324 - Many medium sized contractors local to our base are extremely busy and are either turning down tenders or increasing prices. This puts pressure on consultants issuing tenders and demonstrating value for money to clients.

Paul Stone MRICS, Birmingham, Chalcroft Construction, paulstonie@gmail.com, 07527189614 - Shortage of certain skills.

Robin Goddard BSc FRICS, Dorking, Brodie Plant Goddard, robin.goddard@bpg.co.uk, 01306 887070 - The effect of the Grenfell fire is having a noticeable impact on various works planned or being undertaken in the public sector.

Stephen Taylor MRICS, Canterbury, Taylor Associate (UK) Ltd, stephen.taylor@taylorassoc.co.uk, 01227 457471 - Regulation and poor performance by LA Planning departments are slowing up and hindering progress on projects.

North East

Andrew Dawson, Cramlington, Rider Hunt, andrewdawson@rider-hunt.co.uk, 0191 270 2211 - The North East feels like it is tottering on the brink of recession once more with confidence relatively low.

Ian Millar MRICS, Newcastle upon Tyne, Michael Jarrett Ltd, ian@immccc.co.uk - Companies are 'testing the water' in respect of new buildings or extensions to their existing but very few are currently committing to commissioning the works. The public sector needs to expand to act as a primer for business confidence.

John Pulman FRICS, Stockton-on-Tees, Blake Hill Enterprises, j.pulman@yahoo.co.uk, 01642 945753 - The effect that internet shopping will have on town centres will be massive.

Peter Carruthers, Newcastle upon Tyne, Summers-Inman, peter.carruthers@summers-inman.co.uk, 07764461990 - Whilst Brexit continues to dominate the news and the market is reportedly in decline, activity levels remain stable and expectations in the medium term are positive.

North West

Anthony Dillon, Manchester, Willmott Dixon, anthony.dillon@willmottdixon.co.uk, 01619373960 - The market remains resilient with the better supply chain and contractors being selective in the opportunities they pursue.

Charles Nixon FRICS, Preston, Thornber & Walker, charlesnixon@thornberandwalker.co.uk, 01772 722288 - The demise of Carillion will be very disruptive to the supply chain initially but hopefully in the long term will open up opportunities for the small/medium sized contractors provided major public-sector projects are open to them.

Derek Preston MRICS, Liverpool, AECOM, lderek.preston@aecom.com, 07738574063 - Uncertainty over Brexit.

Chartered Surveyor market comments

Gary Bulloch, Burnley, Savills, gbulloch@savills.com, 07870555826 - Brexit cloud restraining positivity and real growth.

John Boys MCIQB MRICS, Rossendale, B&E Boys Ltd, info@beboys.co.uk, 01706 211 368 - Past months have made forecasting more difficult than norm. Huge 'pull' on resource in Mcr CC yet bid prices as keen as ever. Specialist contractors & skilled resource still holding out at strong pricing levels. New build homes offer some comfort.

Ken Turner, Workington, Balfour Beatty, kenneth.turner@balfourbeatty.com, 07860 894 695 - Main issues I can foresee in the sector I am working in (nuclear) is skills shortage across all categories. It is also becoming increasingly difficult to attract people to work in Cumbria when other projects in the cities are hiring.

Michael Griffiths, Liverpool, Collus Ltd, m.griffiths@collus.co.uk, 07850486117 - All fairly neutral at present.

Yorkshire and Humberside

Kevin Marling, Hull, Delaney Marling Partnership Ltd, kevin@delaneymarlingpartnership.co.uk, 01482 623955 - Engagement of young people into the industry.

Mark Denton (MRICS), Sheffield, Auburn Ainsley Ltd, m.denton@auburnainsley.co.uk, 07976 284198 - Apparent delays in approving NHS Trust annual capital programmes is impacting on workload in some areas.

Paul Neal FRICS, Wakefield, Wakefield and District Housing, pNeal@wdh.co.uk, 01977 724439 - Finding serviced suitable land is the problem.

South West

Andrew Braine FRICS, Exeter, Faithful+Gould, Andy.Braine@fgould.com, 07834 505725 - Lack of investment in highways, particularly repairing pot holes.

Nigel Tansley MRICS, Dursley, Gloucestershire, R Williams Building & Groundworks Ltd, nigeltansley@hotmail.com, 07967456242 - Slow payment of invoices by clients to small/medium builders.

Wales

Ian Bolt, Cardiff, Mott MacDonald, ian.bolt@mottmac.com, 02920 467874 - There are still some ridiculous consultancy fees being submitted despite the level of current workloads and shortage of available staff, e.g. 3-year PM/QS role where the lowest bid was 37% below the average of 3 bids submitted.

Mark Downer MRICS, Mold, WYG, mark.downer@wyg.com, 01352 706207 - No significant change since the previous quarter. Demand and workload remains constant.

Robert Fisher BSc MRICS, Swansea, Robert Fisher Limited, info@robertfisherlimited.co.uk, 01792720010 - Demand for smaller commercial and housing developments are increasing and there appears to be some optimism in future growth. However, the shortage of land, labour resources will stifle growth and are likely to increase costs significantly.

West Midlands

Glen Cooke MRICS, Solihull, Projex Building Solutions Ltd., glen.cooke@projex-solutions.com, 07786635549 - Local authority support/resources (planning, highways, etc) / significant workload generally in West Midlands (particularly B'ham city centre).

Pete Roston, Coventry, CMP Quantity Surveying Limited, pete.roston@cmpqs.co.uk, 07966 204912 - National economic factors and confidence - our work is nationwide and largely commercial.

Phil Hodges MRICS, Redditch, Ridgeways Chartered Quantity Surveyors, phil@ridgewaysqs.co.uk, 01527894514 - Potential further increases in input costs of concern, especially for main contractors on / tendering long term fixed price contracts.

Sean Bowles MRICS, Nottingham, Morgan Sindall, sean.bowles@morgansindall.com, 07967203411 - Continued restraint in capital investment in social infrastructure and Education, Health, Housing, Leisure.

Simon Garrad MSc MRICS, Birmingham, Birmingham City Council, simon.garrad@birmingham.gov.uk, 0121 4647138 - Housing at the levels required will only be possible if delivered by non-profit making organisations such as RSL's or Councils.

William Crosby, Birmingham, Agency worker, willcrosby@blueyonder.co.uk, 07899934841 - Rail industry: continuity of work between this Control Period and the next in 12 months' time.

East Midlands

Adrian Cox CEnv., FRICS, FCIQB., Newark, Nottinghamshire, Waystone Limited, adrian.cox@waystone.co.uk, 01773 524500 ext 510 - Uncertainty and regulation.

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.

Peter Tyers, Loughborough, Peter Tyers Associates, peter@ptassoc.co.uk, 01509 842280 - Availability of land release for single to 10 units: most land is sold in much larger sizes and thus only available for large estates.

Eastern

Alistair, Saffron Walden, Forbes Associates, info@forbesassociates.co.uk, 01799527700 - Huge releases of land for unnecessary housing.

Chris Keeble BScDipProjMan MRICS, Ipswich, Gill Associates, ckeeble@gillassociates.co.uk, 01473 214646 - Despite workload there are still incredibly low fee bids being tabled which undervalue the profession.

Kevin Branniff MRICS, Glasgow, Branniff Joinery Ltd, Kevin_branniff@hotmail.co.uk, 07595986475 - Lack of desire for young tradesmen to improve their skills and work ethic as they feel they don't need to as there is so much work and other opportunities.

Kevin Woodroffe MRICS, Cambridge, AECOM, kevin.woodroffe@aecom.com, 01223 488074 - Cambridge is still currently experiencing a boom in construction activities which has attracted other companies and practises to move into the city, however the outcome of BREXIT is an uncertainty for the future.

Raymond Burch FRICS, Cambridge, Marstan BDB, ray.burch@marstanbdb.com, 01223675975 - There seems to be a bubble around Cambridge, buoyed by major schemes promoted by the University. Elsewhere the picture is patchy.

RJ Franklin MRICS, Bedford, Robinson & Hall LLP, rjf@robinsonandhall.co.uk, 01234 352201 - Looking forward and hoping for a prosperous 2018 for the construction industry.

Sean Kelleher MRICS, Saffron Walden, Wilby & Burnett LLP, sean@wilbyburnett.co.uk, 01799513621 - Work in VA School sector and Academies where late funding decisions by ESFA and very short application windows for Academy funding add unnecessary stresses to workloads.

Stephen Devoy, Huntingdon, Rapleys LLP, stephen.devoy@rapleys.com - Whilst the survey has been compiled in regard to the Eastern region my practice operates on a national basis.

Scotland

Alexander S Millar FRICS, Greenock, Millar Surveying Services, millarsurveying@googlemail.com, 01475 745555 - Depopulation.

Chartered Surveyor market comments

Northern Ireland

Adrian Petticrew MRICS, Belfast, McNicholas (Part of Kier Group), adrian.petticrew@mcnicholas.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.

Brian James Shields MRICS, Belfast, Central Procurement Directorate, Dept of Finance, brian.shields@finance-ni.gov.uk, 02890816237 - Political stalemate and investment.

Gerard Lenaghan MRICS, Castlewellan, Danmar Consulting, danmarconsulting@gmail.com, 02843770754 - Skilled tradesmen shortages, especially bricklayers, stonemasons and tilers.

Keith Mclean, Belfast, Colleys Surveyors - Lloyds Banking Group, keithmclean@halifax.co.uk, 07831 479464 - As sales increase, builders' confidence also increases thereby boosting output.

Kerr Houston, Belfast, Johnston Houston, kerr.houston@johnstonhouston.com, 02890330133 - The continued lack of NI Executive is deterring external investment in the Province.

Mark Hughes, Belfast, McNicholl Hughes, mark@mcnichollhughes.com, 02890618181 - Lack of functioning government in NI and Brexit.

Oliver Smith, Ballymena, SurveyLink [NI] Ltd, ollie.smith@tiscali.co.uk, 07890 555108 - No devolved government at Stormont - complete lack of leadership and policies moving in to 2108.

Sean Stewart, Dungannon, Stewart Consulting, info@stewartconsulting.eu, 07710092164 - Significant number of "settled" EU nationals leaving, not because of Brexit but on the loss of £ strength against the €.

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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 Q4 2017 = 303

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.

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