Workload Trends 2014 Q2

Optimism over workloads and hiring intentions

Weighted Balances (%)

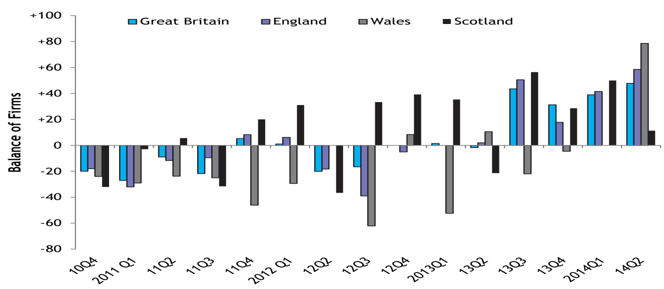
Change on 12 Months Ago	
Workload	
2013 Q2	-2
2014 Q2	+48
Tender Prices	
New Work	
2013 Q2	+9
2014 Q2	+51
R&M Work	
2013 Q2	+13
2014 Q2	+39
Order Books	
2013 Q2	+5
2014 Q2	+38
Over the Next 12 Months	
Expected Workload	
2013 Q2	+39
2014 Q2	+58
Expected Orders	
New Work	
2013 Q2	+24
2014 Q2	+40
R&M Work	
2013 Q2	+25
2014 Q2	+11

- Workloads increased, on balance, for a fourth quarter in Q2. In Great Britain, 48% of firms, on balance, reported that workloads had increased.
- Growth in workloads was reported across all countries and sectors, on balance.
- Workload and employment expectations in the next 12 months were at the highest levels since 2008.
- Over three quarters of firms in Great Britain reported that costs had increased by up to 5% compared to 12 months earlier and 5% reported increases of over 5%.
- 48% of respondents reported supply issues with staff, 42% with skilled operative and 17% with other operatives.

Change in Workloads and Order Books - Great Britain

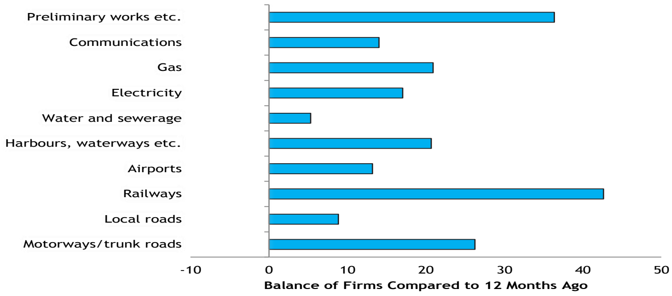
Trends in Workload

Workloads Compared to 12 Months Ago



Workloads increased, on balance, for a fourth quarter in Q2. In Great Britain 48% of firms on balance, reported that workloads had increased. Overall, only 7% of firms reported that workloads had declined. In England, 4% of respondents reported that workloads had fallen, compared to 10% in Q1. In England, 59% of firms, on balance, reported an increase, compared to 42% in Q1. In Scotland, 51% of firms reported that workloads were unchanged on a year earlier, but only 30% reported that workloads were higher, leaving a positive overall balance of 11%, the lowest in three years. In Wales, 79% of firms, on balance, reported an increase in workloads, up from zero in Q1.

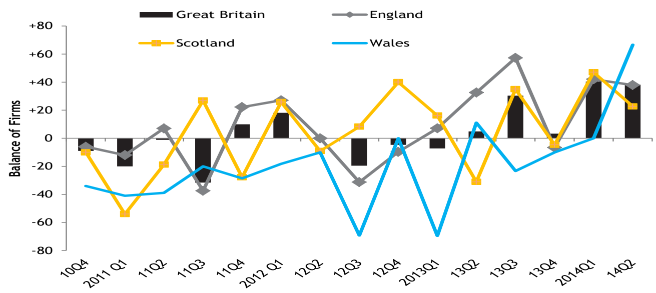
Workload — By Type of Work (GB)



All sectors reported that workloads increased compared to Q2 last year, on balance. For a seventh consecutive quarter, railways remained the strongest sector for improved workloads. 43% of firms in the sector, on balance, reported an increase, broadly similar to Q1 (45%). The preliminary works (36%), motorways/trunk roads (26%) and harbours/waterways (21%) sectors also reported strong growth in the second quarter, on balance. Firms in the local roads, airports and gas sectors reported higher workloads in Q2, resulting in positive overall balances of 9%, 13% and 21%, respectively in the quarter.

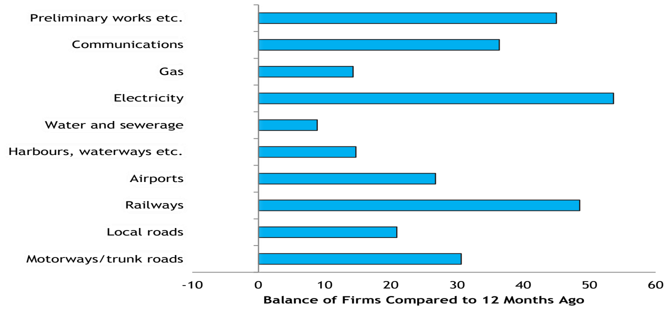
Trends in Orders and Future Expectations

Orders Compared to 12 Months Ago



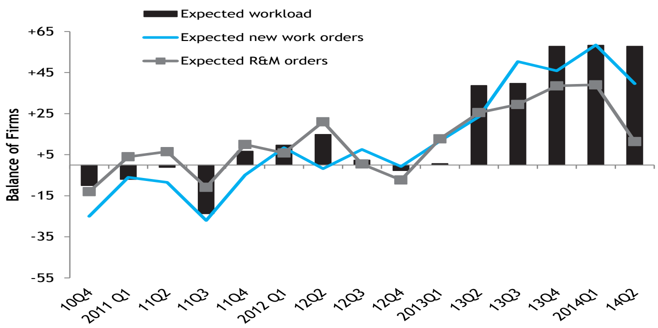
38% of firms, on balance, reported growth in orders in Q2, compared to 40% in Q1. 15% of respondents reported that orders had decreased, the lowest since 2011 Q2. Orders increased according to 38% of firms on balance in England. In Scotland, 23% of respondents, on balance, reported growth in Q2, compared to 47% in Q1. In Wales, the balance of firms reporting a change in orders compared to 12 months ago rose to 67%, a sharp improvement following negative or zero balances for the three previous quarters. No firms in Wales reported a fall in orders in Q2.

Order Books — By Type of Work (GB)



All sectors reported an increase in orders compared to 12 months ago, on balance in Q2. The sectors reporting the highest balances were electricity (54%), railways (49%) and preliminary works (45%). Railways and preliminary works have recorded the strongest balances for the last five quarters since 2013 Q2. In the local roads sector, 21% of respondents, on balance, reported a rise in orders. This was the first increase recorded in three years. Similarly, a balance of 27% of firms in the airports sector reporting orders growth was the highest since 2011.

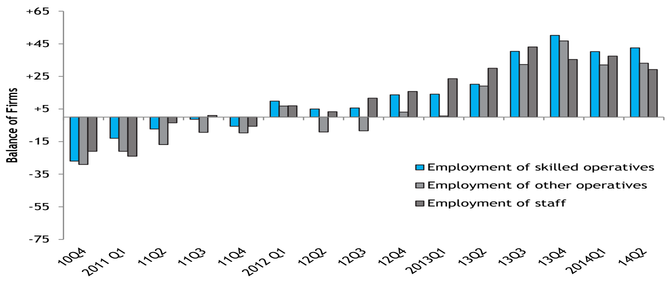
Expected Future Trends in the Next 12 Months



Expected future trends improved in Great Britain for a sixth consecutive quarter. On balance, 58% of firms reported that workloads are expected to increase in the next 12 months, unchanged from Q4 and Q1. In England, 73% of firms on balance expect workloads to increase. In Scotland, this figure was 52%, but in Wales, 4% of firms, on balance, expected workloads to fall. 40% of British firms expect new work orders to be higher in the next 12 months on balance. By nation; England (48%), Scotland (30%) and in Wales (0%). For R&M orders, 11% of British firms, on balance, expect an increase during the next 12 months, this figure is 25% for English firms and 2% for Scottish firms. However, 33% of Welsh firms expect R&M orders to decrease, on balance.

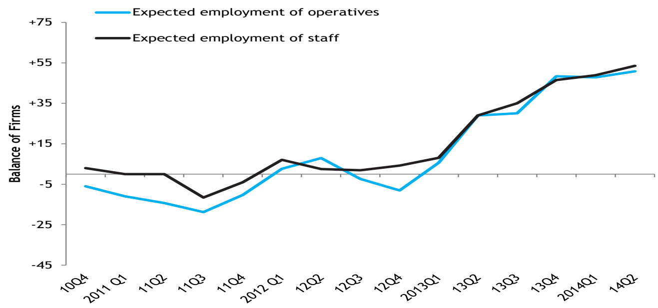
Trends in Employment

Employment Compared to 12 months Ago (GB)



Employment data showed a continued improvement in Q2. In Britain, on balance, employment of skilled operatives, other operatives and staff improved according to 43%, 33% and 29% of firms respectively. For English firms, employment increased, on balance, according to 55% of firms for skilled operatives, 39% for other operatives and 40% for staff. In Wales the balance improved compared to Q1; a balance of 4% was reported for skilled operatives and for other operatives, compared to zero balances in Q1. For staff, the balance worsened to -15% from 22%. In Scotland, on balance, increases were reported by 26% of firms for skilled operatives, 17% for other operatives and 10% for staff.

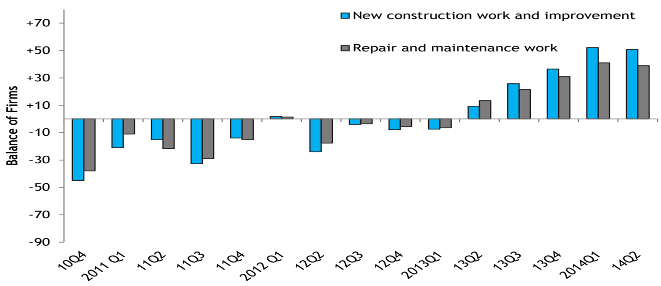
Expected Employment in the Next 12 Months



On balance, 51% of firms in Britain expect the employment of operatives to increase and 54% expect the employment of staff to increase, in the next 12 months. In England, on balance, more than half of all respondents expect employment of operatives (58%), and employment of staff (63%) to increase. Prospects were pessimistic in Wales than in Q1. On balance, operatives and staff employment is expected to decrease according to 4% of respondents, compared to increases expected in the previous quarter. In Scotland, on balance almost half of respondents expect employment to increase for operatives (49%) and 51% for staff.

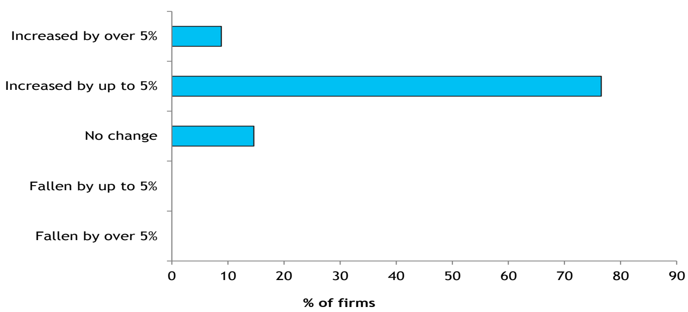
Trends in Costs, Tender Prices and Supply Constraints

Tender Prices Compared to 12 Months Ago (GB)



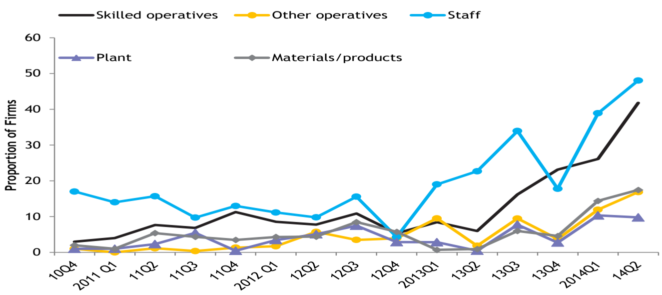
Compared to 12 months ago, tender prices were higher, on balance, for 51% of firms for new construction work and improvement, and 39% of firms for repair and maintenance work. In England, 40% of firms, on balance, reported higher tender prices for new construction work and improvement and 29% for repair and maintenance. In Wales, 73% of firms, on balance, reported an increase in tender prices for new construction and improvement and 62% of firms for repair and maintenance. In Scotland, on balance, 39% of respondents reported an increase in new construction work and improvement and 36% in repair and maintenance.

Costs Compared with 12 Months Ago (GB)



Over three quarters (77%) of firms in Great Britain reported that costs had increased by up to 5% compared to 12 months earlier in Q2 and 9% reported increases of over 5%. Overall, on balance, 85% of firms reported an increase in costs. In England, 88% of firms, on balance, reported an increase in costs. 5% reported rises of more than 5%, 83% by up to 5% and 12% reported no change. In Scotland, costs increased on balance according to 77% of firms, and 16% of firms reported cost increases of more than 5%, compared to 5% in Q1. In Wales, 96% of firms, on balance, reported an increase in costs over the last 12 months. 4% of firms reported no change and 96% reported increases up to 5%.

Contractors Unsatisfied with Supply (GB)



Overall, the supply of suitable workers worsened compared to the first quarter of 2014 for civil engineering firms in Great Britain. 42% and 17% of respondents reported dissatisfactory supply of skilled operatives and other operatives, respectively. The percentage reporting dissatisfaction for staff increased from Q1: 48% reported dissatisfaction compared to 39% last quarter. 10% of firms reported dissatisfaction with plant and 17% reported dissatisfaction with materials/products. In England, the most commonly reported dissatisfaction was staff (53%). In Wales 41% of firms reported dissatisfaction with supply of staff. Staff was also the most cited issue in Scotland, with 40% of firms dissatisfied.

Workload Trends Survey

1 Workload

	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
Compared with 12 Months Ago															
By Country															
GB	-32	-20	-27	-22	+5	+1	-20	-17	0	+1	-2	+44	+31	+39	+48
England	-26	-18	-32	-9	+8	+6	-18	-39	-5	0	+2	+51	+18	+42	+59
Scotland	-35	-32	-3	-32	+20	+31	-37	+33	+39	+35	-21	+56	+29	+50	+11
Wales	-70	-24	-29	-25	-46	-29	0	-62	+8	-52	+11	-22	-5	0	+79
By Size of Firm															
<115	-31	-23	-38	-12	-10	-18	-28	-8	+8	-10	+6	+41	+47	+13	+21
115-299	-59	-29	-10	0	-14	+8	+5	+27	-22	+13	0	+64	+18	+75	+38
300-599	-20	0	0	-29	-33	+33	0	0	-20	+60	-50	0	+38	+33	+67
600+	-16	-16	-35	-35	+49	0	-33	-51	+7	-7	+8	+53	+27	+39	+55
By Type of Work															
Motorways & trunk roads	-40	-73	-61	-58	-37	-43	-53	-37	-33	-34	-6	+7	+13	+21	+26
Local roads	-49	-29	-37	-30	-41	-30	-42	-50	-30	-27	-32	+2	-6	-9	+9
Railways	-17	-2	+24	+15	+41	+32	+52	+21	+53	+28	+69	+54	+51	+45	+43
Airports	-18	-26	-23	-14	-1	-23	-5	+2	-17	-1	+18	+4	-2	-16	+13
Harbours, waterways etc.	-32	-30	-19	-11	-10	-3	+11	-15	-7	-5	+14	-4	+13	+3	+21
Water & sewerage	-23	-15	+23	+23	+12	+8	+23	+27	+1	+20	+24	+23	+20	+2	+5
Electricity	-4	+35	+17	+20	-4	+41	+28	+19	+8	+10	+16	+24	+6	+20	+17
Gas	+6	-24	-20	-28	-18	+14	-2	+24	+1	-25	+2	-2	+2	-26	+21
Communications	-10	-7	-28	-41	-35	-23	+1	-13	-34	-35	-4	-2	+22	0	+14
Preliminary works, etc.	-26	-23	-8	-13	-15	+3	-7	-10	-12	-8	+15	+30	+40	+48	+36

Weighted % Balance of Respondents

2 Expected Workload

	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
In the Next 12 Months															
By Country															
GB	-36	-10	-7	-24	+7	+10	+15	+2	-3	+1	+39	+40	+58	+58	+58
England	-34	-10	-9	-25	+9	+16	+27	+10	+4	+22	+55	+68	+61	+63	+73
Scotland	-27	+5	+5	+19	+8	-6	0	+8	-12	-5	+21	+14	+47	+50	+52
Wales	-79	-25	-23	-35	-47	+8	-18	-52	-22	-66	+3	+4	+10	+22	-4
By Size of Firm															
<115	-45	-27	-18	-16	-7	+5	-10	-9	-8	-6	+11	+38	+56	+33	+43
115-299	-22	+7	+8	-4	+5	0	+4	+19	+14	+22	+42	+75	+55	+44	+69
300-599	-29	0	0	-13	-13	+11	+21	+11	-10	-14	+29	-10	+38	+63	+100
600+	-33	-11	-12	-39	+24	+17	+30	0	-3	0	+52	+45	+66	+68	+52

Weighted % Balance of Respondents

3 Order Books

	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
Compared with 12 Months Ago															
By Country															
GB	-38	-9	-20	-32	+10	+18	0	-20	-5	-7	+5	+30	+3	+40	+38
England	-31	-6	-12	-37	+22	+27	0	-31	-10	+7	+33	+57	-7	+42	+38
Scotland	-46	-10	-54	+27	-28	+26	-9	+8	+40	+16	-31	+35	-5	+47	+23
Wales	-70	-34	-41	-20	-29	-18	-10	-69	0	-70	+11	-23	-10	0	+67
By Size of Firm															
<115	-27	-23	-35	-15	-2	-14	-12	-14	-4	-21	+13	+30	+35	0	+21
115-299	-52	-24	-26	-5	-16	-21	+10	+17	-6	+24	+8	+45	+18	+50	+23
300-599	-35	0	+33	+14	-50	+57	+25	-13	-25	0	-43	+11	+14	+40	+67
600+	-35	+4	-5	-63	+66	+35	-9	-40	0	-10	+18	+33	-13	+50	+44
By Type of Work															
Motorways & trunk roads	-62	-76	-74	-58	-23	-22	-35	-46	-21	-20	+9	-1	-8	+26	+31
Local roads	-56	-31	-39	-36	-39	-32	-43	-45	-18	-34	-16	-3	-8	-8	+21
Railways	-51	+5	+14	+15	+36	+32	+49	+7	+36	0	+63	+50	+30	+32	+49
Airports	-53	-27	-17	-16	+18	-11	+2	-5	+16	+10	+20	+4	-10	-1	+27
Harbours, waterways etc.	-32	-19	-15	-18	+1	-7	+5	-14	-6	-9	+11	+1	+20	+6	+15
Water & sewerage	-23	+1	+22	+9	+11	-1	+27	+22	-26	+2	-1	0	+1	-1	+9
Electricity	-1	+25	+30	+9	0	+22	+12	+27	+14	+27	-2	+28	-3	+12	+54
Gas	-49	-19	-19	-31	+1	-2	-8	+34	-19	-12	+18	-4	+18	-18	+14
Communications	-16	-20	-2	-30	-60	-33	-25	-13	-41	-49	-8	-9	+21	-3	+36
Preliminary works, etc.	-25	-25	-24	-26	-27	+2	-22	-20	+1	+3	+14	+26	+35	+22	+45

Weighted % Balance of Respondents

4 Expected Trends in New Orders

	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
In the Next 12 Months															
New Work															
By Country															
GB	-39	-25	-6	-27	-5	+8	-2	+8	-1	+12	+24	+50	+46	+58	+40
England	-33	-26	-3	-32	-5	+15	+7	+26	+17	+39	+45	+64	+44	+63	+48
Scotland	-46	+10	-3	+31	+15	-9	-12	+2	-17	+7	-2	+16	+41	+38	+30
Wales	-82	-52	-29	-39	-58	+4	-9	-39	-11	-69	-33	+31	+10	+22	0
By Size of Firm															
<115	-46	-31	-15	-23	0	+11	-22	-9	-14	-8	+9	+30	+48	+33	+37
115-299	-22	0	-5	+7	-22	-13	+8	+6	+9	+26	+26	+75	+45	+50	+56
300-599	-49	0	+25	-13	-13	+11	+7	+22	-10	+14	+14	0	+50	+43	+100
600+	-33	-40	-7	-48	+3	+17	0	+13	+8	+15	+31	+66	+44	+71	+26
R&M															
By Country															
GB	-24	-13	+4	-11	+10	+6	+21	+0	-7	+13	+25	+29	+39	+39	+11
England	-15	-11	+1	+1	+17	+22	+38	+22	+11	+24	+43	+40	+49	+51	+25
Scotland	-39	-27	+17	+11	-13	-19	+7	-15	-41	+10	+5	+4	+4	+31	+2
Wales	-70	-25	-5	-39	-23	-21	-31	-61	-36	-77	-26	+7	-18	-11	-33
By Size of Firm															
<115	-42	-25	+3	-19	+2	+2	-14	-22	-17	-16	-4	+31	+37	+10	+20
115-299	-22	0	0	-13	-10	-14	-5	+20	-14	+9	+6	+42	+45	+18	+40
300-599	-39	0	0	-25	-29	-11	+14	-11	-29	-17	+14	-22	+33	+38	+43
600+	-5	-15	+7	-3	+37	+24	+56	+13	+8	+33	+51	+42	+38	+53	-3

Weighted % Balance of Respondents

5 Employment

5 Employment	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
Compared with 12 Months Ago															
By Country															
Skilled operatives															
GB	-30	-27	-13	-1	-6	+10	+5	+6	+14	+14	+20	+40	+50	+40	+43
England	-27	-23	-16	-1	-7	0	+1	0	+9	+7	+35	+65	+42	+43	+55
Scotland	-31	-42	-5	+7	-4	+8	-14	+24	+23	+41	+7	+36	+42	+58	+26
Wales	-56	-42	-11	+5	-21	+4	+41	-29	+39	-3	+17	-31	+22	0	+4
Other operatives															
GB	-38	-29	-21	-9	-10	+7	-9	-8	+3	+1	+19	+32	+47	+32	+33
England	-33	-25	-26	-8	-6	-1	-22	-18	-3	-4	+29	+48	+29	+35	+39
Scotland	-37	-52	-7	-5	-46	0	-14	+8	+16	+19	+23	+37	+63	+39	+17
Wales	-82	-44	-11	-9	-32	+4	+25	-35	+28	-7	+17	-33	+4	0	+4
Staff															
GB	-36	-21	-24	+1	-6	+7	+3	+12	+16	+24	+30	+43	+35	+37	+29
England	-36	-19	-18	-4	-6	-1	-5	+3	+5	+20	+44	+67	+37	+42	+40
Scotland	-34	-40	-51	+36	0	0	-7	+34	+18	+35	+17	+46	+17	+56	+10
Wales	-43	-29	-6	+4	-53	-26	+18	-19	+33	+7	+20	-33	+26	+22	-15
By Size of Firm															
Skilled operatives															
<115	-31	-23	-20	-6	-5	-2	-16	-14	+13	-4	-4	+26	+44	+25	+18
115-299	-26	-35	-5	+15	-22	+4	+12	+18	+17	+18	+30	+60	+41	+44	+56
300-599	-26	-25	-50	0	-13	+33	+7	0	+20	+29	-25	+30	+13	+56	+75
600+	-38	-24	-9	-6	+4	+10	+12	+16	+11	+19	+41	+44	+65	+40	+40
Other operatives															
<115	-31	-25	-13	-10	-10	-9	-21	-14	+3	-13	0	+19	+36	+19	+36
115-299	-52	-43	-22	-4	-18	-4	+8	+6	0	+14	+37	+48	+20	+56	+56
300-599	-26	-25	-50	-11	-38	+22	0	+11	+10	+29	-13	+20	+25	+38	+75
600+	-38	-24	-21	-11	+4	+15	-14	-20	+2	-3	+30	+36	+65	+30	+18
Staff															
<115	-25	-4	-13	0	-12	-9	-6	-5	+1	+8	+7	+14	+28	+21	+14
115-299	-34	-32	-13	+7	-4	-9	+28	+18	+30	+18	+35	+57	+41	+39	+56
300-599	-14	-25	-75	0	-13	+22	-7	+22	+30	+43	-13	+40	+13	+44	+63
600+	-36	-24	-16	-1	0	+17	+3	+16	+14	+28	+51	+51	+43	+40	+21

Weighted % Balance of Respondents

6 Expected Employment

6 Expected Employment	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
In the Next 12 Months															
By Country															
Operative jobs															
GB	-31	-6	-11	-19	-10	+3	+8	-2	-8	+6	+29	+30	+48	+48	+51
England	-23	-2	-10	-24	-18	+4	+16	+7	-1	+21	+53	+65	+53	+49	+58
Scotland	-49	-5	0	+10	+13	-6	-2	-6	-10	-6	+10	+18	+31	+45	+49
Wales	-70	-38	-41	-26	-47	+4	-27	-48	-28	-24	+3	-16	+5	+28	-4
Employment of staff															
GB	-26	+3	0	-12	-4	+7	+3	+2	+4	+8	+29	+35	+47	+49	+54
England	-15	+7	0	-22	-5	+12	+11	+9	+12	+23	+51	+63	+37	+62	+63
Scotland	-56	0	0	+21	+8	-9	-17	+6	-12	-4	+12	+16	+48	+34	+51
Wales	-61	-21	-12	-22	-47	0	-18	-42	-11	-17	0	-11	+5	+17	-4
By Size of Firm															
Operative jobs															
<115	-25	-21	-28	-11	-3	-7	-7	-13	-8	0	+2	+33	+46	+29	+41
115-299	-34	-4	0	0	-5	+4	0	+6	+9	+13	+37	+60	+55	+50	+63
300-599	-43	0	+25	-25	-25	+11	+7	0	-30	-29	+14	0	+38	+63	+86
600+	-25	0	-16	-28	-13	+4	+20	0	-7	+13	+42	+29	+50	+50	+45
Employment of staff															
<115	-23	-7	-15	-7	-7	-2	-7	-7	-3	+1	+15	+27	+41	+25	+27
115-299	-36	+4	+13	+4	0	+4	+8	+13	+14	+9	+32	+65	+59	+33	+56
300-599	-32	0	+25	-13	-25	+11	-7	+11	-10	0	0	+10	+38	+63	+100
600+	-12	+10	-5	-20	+3	+12	+10	0	+11	+13	+42	+37	+47	+57	+52

Weighted % Balance of Respondents

7 Costs

7 Costs	Q3	Q4	2011 Q1	Q3*	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
Compared with 12 Months Ago (%)															
GB															
Falling	+9	+4	+6	+3	+0	0	+1	+0	+4	+8	0	+1	0	0	0
Unchanged	+31	+19	+18	+15	+1	+4	+11	+3	+1	+0	+6	+5	+3	0	0
Slower	+30	+29	+9	+26	+27	+22	+23	+22	+23	+20	+23	+18	+25	+10	+15
Same rate	+25	+31	+25	+45	+62	+64	+55	+69	+61	+61	+66	+72	+62	+75	+77
Faster	+6	+18	+42	+12	+10	+10	+10	+6	+11	+10	+5	+4	+9	+15	+9
Cost Balances															
By Country															
GB	+52	+74	+70	+40	+70	+70	+54	+71	+67	+63	+64	+71	+68	+90	+85
England	+54	+80	+70	+42	+72	+73	+48	+77	+68	+62	+70	+75	+65	+90	+88
Scotland	+40	+9	+67	+49	+54	+58	+53	+70	+57	+81	+62	+76	+42	+86	+77
Wales	+47	+92	+76	+70	+63	+72	+50	+87	+78	+10	+10	+38	+96	+83	+96
By Size of Firm															
<115	+77	+91	+79	+69	+79	+75	+66	+68	+78	+82	+74	+71	+82	+79	+86
115-299	+37	+61	+77	+63	+65	+57	+44	+47	+70	+82	+74	+81	+70	+83	+94
300-599	+43	+50	+75	+50	+50	+89	+67	+67	+70	+86	+57	+80	+75	+63	+75
600+	+27	+76	+67	+13	+73	+67	+46	+84	+59	+44	+58	+66	+60	+100	+86

* Discontinuity in series due to an amendment to the question in order to collect more detailed information on the degree of cost change.

8 Tender Prices

8 Tender Prices	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
Compared with 12 Months Ago															
New work															
By Country															
GB	-74	-45	-21	-33	-14	+2	-24	-4	-8	-7	+9	+26	+36	+52	+51
England	-76	-42	-17	-35	-14	-7	-29	-4	-11	-12	+24	+21	+23	+56	+40
Scotland	-66	+62	-23	-21	-38	-23	-29	-28	-5	+2	+7	+10	+40	+13	+39
Wales	-70	-56	-35	-52	-53	+4	-73	+20	-61	-86	-63	+4	+5	+53	+73
By Size of Firm															
<115	-51	-47	-11	-21	-3	-13	-23	-25	-9	-1	+23	+29	+29	+24	+45
115-299	-77	-42	-18	-26	-23	0	-38	-25	+18	+13	0	+37	+36	+56	+69
300-599	-57	-50	-50	-38	-63	+11	+13	-33	-40	-14	-29	-20	+13	+29	+57
600+	-100	-45	-7	-40	0	+7	-37	+29	-6	-15	+17	+34	+46	+64	+47
R&M															
By Country															
GB	-58	-38	-11	-29	-15	+1	-18	-4	-6	-6	+13	+22	+31	+41	+39
England	-58	-34	-5	-22	-17	-13	-25	0	-12	-19	+23	+11	+20	+46	+29
Scotland	-57	-74	-28	-54	-36	-16	-21	-24	-5	+13	+8	+2	+23	+28	+36
Wales	-57	-42	-29	-43	-46	+24	-44	-16	-38	-62	-58	+14	+10	+53	+62
By Size of Firm															
<115	-45	-43	-19	-13	0	-12	-16	-9	-8	-3	+18	+16	+24	+17	+27
115-299	-69	-42	-18	-30	-26	-5	-30	-14	+14	0	-13	+30	+41	+60	+60
300-599	-32	-33	0	-38	-57	+25	+21	-33	-29	0	-33	0	+13	+43	+50
600+	-79	-33	+7	-34	-8	+3	-31	+18	-6	-11	+33	+28	+35	+44	+36

Weighted % Balance of Respondents

9 Supply of Resources Required

9 Supply of Resources Required	Q3	Q4	2011 Q1	Q3	Q4	2012 Q1	Q2	Q3	Q4	2013Q1	Q2	Q3	Q4	2014Q1	Q2
Skilled Operatives															
GB	5	3	4	7	11	9	8	11	5	8	6	16	23	26	42
England	5	2	5	5	15	8	11	6	5	6	3	3	16	23	47
Scotland	7	0	3	18	0	13	5	10	14	17	12	40	43	35	33
Wales	0	8	0	0	0	12	9	35	0	0	0	31	19	33	11
Other Operatives															
GB	2	1	0	0	1	2	6	3	4	10	2	9	4	12	17
England	2	1	1	0	0	0	10	3	7	10	2	5	6	18	27
Scotland	2	0	0	0	0	10	0	6	0	12	5	10	5	10	16
Wales	0	0	0	0	0	0	0	0	0	14	0	20	0	0	0
Staff															
GB	1	17	14	10	13	11	10	16	4	19	23	34	18	39	48
England	1	20	19	5	19	14	15	13	4	13	24	23	11	39	53
Scotland	0	0	0	41	0	3	5	0	2	28	3	32	26	40	40
Wales	0	8	0	0	0	12	0	35	11	0	7	44	19	33	41
Plant															
GB	2	1	1	5	0	3	5	7	3	3	0	8	3	10	10
England	3	0	1	8	1	0	6	12	2	0	1	3	1	9	12
Scotland	0	0	0	0	0	5	0	2	2	10	0	14	3	3	12
Wales	0	4	0	0	0	0	0	0	22	0	0	20	19	0	0
Materials and Products															
GB	2	2	1	4	3	4	4	8	6	1	1	6	5	14	17
England	0	1	1	7	5	2	7	13	11	1	1	2	5	16	17
Scotland	10	0	3	0	0	3	2	8	0	1	3	6	3	3	14
Wales	0	4	0	0	0	0	0	0	0	0	0	20	0	0	0

% of Respondents Reporting Unsatisfactory Availability of Resources

About the Civil Engineering Contractors Association (CECA) and Workload Trends

The number of contractors taking part in CECA's 2014 Q2 survey totalled 91. The survey responses are weighted by size of firm to ensure that results are representative of the industry. The results displayed are typically weighted balances and are calculated by taking the difference between firms reporting an increase in workloads, for example, and the proportion of firms experiencing a fall.

CECA has over 300 member firms which carry out more than 80% of all civil engineering work in Great Britain. The quarterly CECA survey of civil engineering workload trends, in which more than a third of the membership takes part, tests for changes over the past year in contractors' workload, workforce, order books, cost trends, and tender prices. It also examines the supply situation for key resources, and contractors' expectations of trends in new orders and employment in the coming 12 months. Full reports of the CECA survey are available to non-members; £30 per single copy or £100 for an annual subscription.