

East Anglia THREE
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UK Construction Survey

Royal Institution of Chartered Surveyors
(RICS)

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Q4 2015: RICS UK Construction Market Survey

Skills shortages and financial constraints impede growth but demand pipeline remains strong

- Growth in workloads moderates slightly as financial and capacity constraints impede development
- Shortage of quantity surveyors and bricklayers are particularly evident
- Demand pipeline remains strong for 2016 but labour shortages will restrict growth

The Q4 2015 RICS Construction Market Survey shows the private commercial and housing sectors continuing to drive growth. The headline workloads net balance moderated slightly, to 33, from 39 the previous quarter. New-build activity rose at a broadly similar pace to Q3 while R&M workloads grew at a more moderate rate. Anecdotal evidence suggests that growth is being restricted by significant skills shortages, delays in the planning process and financial constraints.

The private commercial sector led the growth in Q4 with a net balance of 42% of surveyors reporting their workloads to have risen. This is slightly down on the previous quarter but still represents solid growth with commercial workloads rising in all parts of the UK. Growth in the private housing sector also moderated slightly with a net balance of 40% of contributors reporting a rise in activity, down from 47% in Q3 last year. Workloads in the infrastructure and private industrial segments continue to grow at a steady pace with net balances of 29% and 26% of respondents, respectively, seeing activity rise rather than fall. Meanwhile, growth in the public sector continues to trail the other segments, edging up only modestly in Q4.

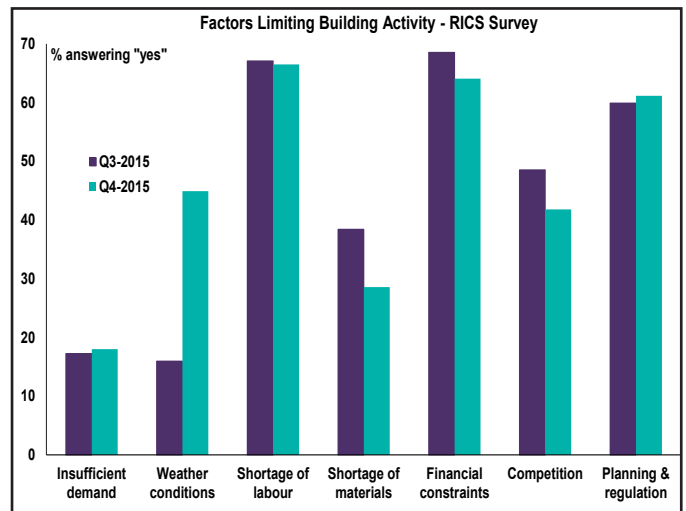
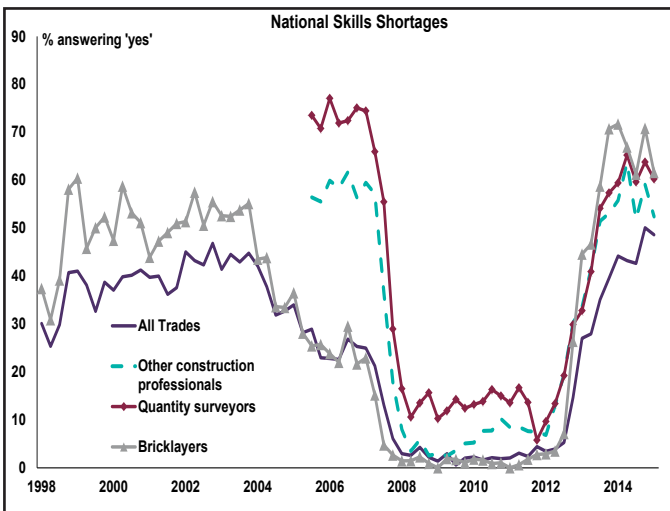
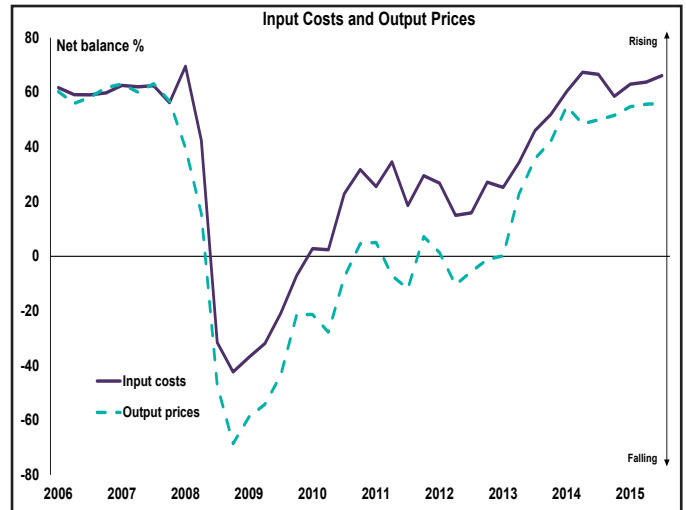
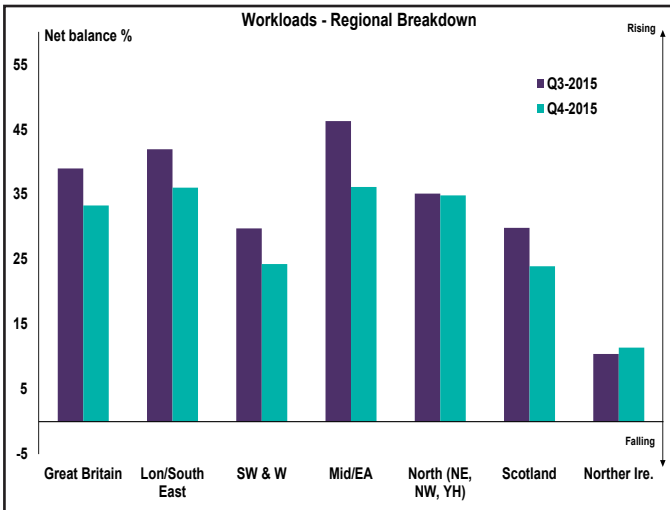
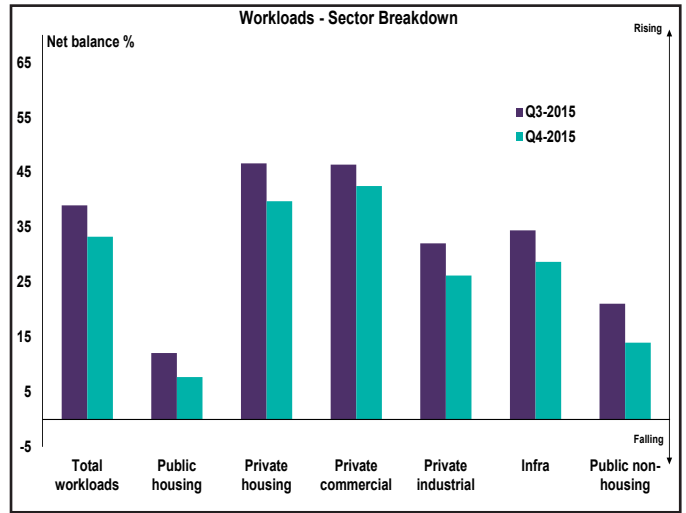
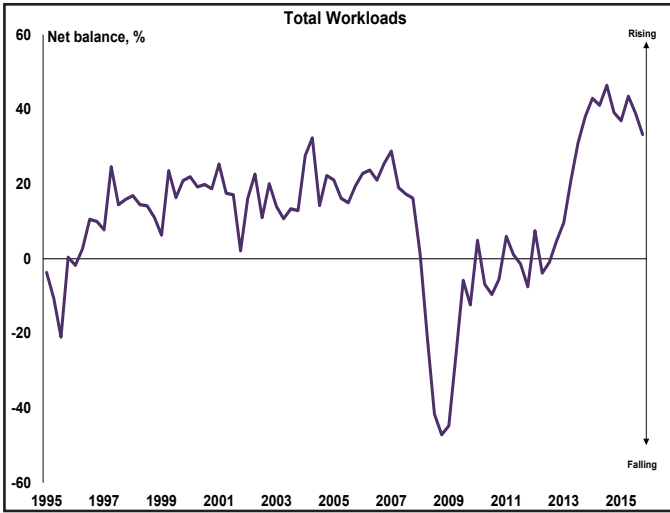
Labour shortages, planning delays and financial constraints were reported to be the most significant impediments to growth in Q4 with over 60% of respondents citing issues with each. 66% of surveyors reported skills shortages in Q4, which is no surprise given that output is estimated to be just 2% below its pre-crisis high while the construction workforce and employment are around 5% smaller now than they were prior to the recession. Bricklayers and quantity surveyors are reported to be in particularly short supply with 62% and 60% of contributors having difficulty sourcing these skills. These shortages are causing delays at different stages in the development process and leading to significant problems with project planning. With net lending to the sector falling by £274m in the three months to November, 64% of respondents cited financial constraints as an impediment to growth.

Skills shortages are driving a sharp acceleration in wage growth in the sector with average earnings rising by more than 6% in the year to October. A net balance of 61% of contributors reported wages to have risen further in Q4. This rise in labour cost is the main driver of input price growth at present and is putting pressure on profit margins. While a net balance of 56% reported output prices to have risen in Q4, total input costs grew at a firmer pace with 66% reporting a rise. Nonetheless, with the demand pipeline still strong, a net balance of 45% of respondents expect profit margins to rise over the year to come.

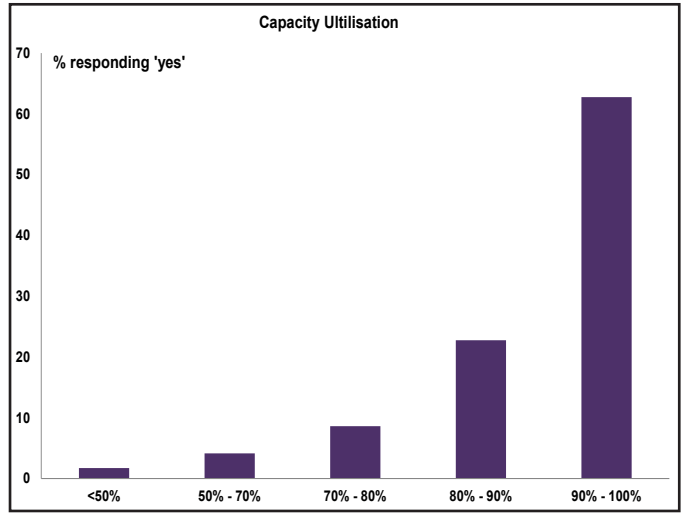
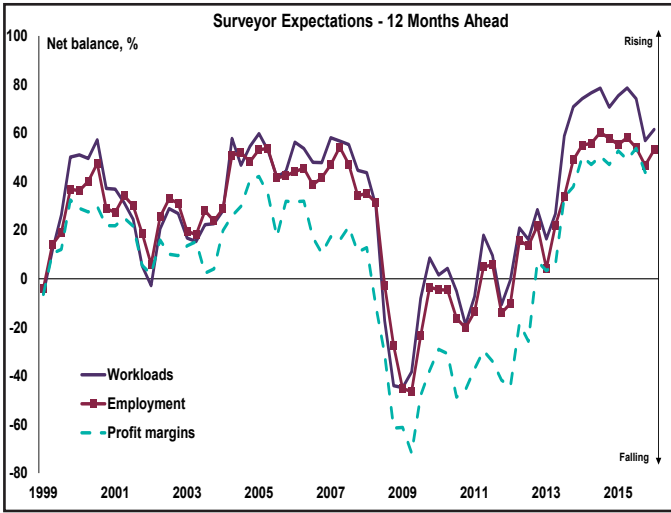
At the 12 month horizon, respondents remain confident in the outlook for growth with a net balance of 61% expecting workloads to rise further during 2016. However, contributors report that their firms are currently operating at 90% of full capacity, on average, and so, growth over the coming 12 months is expected to moderate with workloads forecast to rise by 3.4%, down from 3.8% previously. Indeed, 28% of contributors report that they have no spare capacity left at present, a similar figure to Q3, suggesting that they would not be able to increase their workload further this year without expansion of their firm. Employment is expected to continue to rise, with a balance of 53% forecasting further growth. However, given the difficulty firms have had in recruiting in recent quarters, respondents have more modest expectations for growth and are now expecting headcounts to rise by 2% in the coming 12 months. This figure is unchanged from Q3 last year but represents a fall on previous quarters.

All areas of the UK are seeing activity levels rise with the English regions seeing particularly firm growth. Northern Ireland continues to lag other areas in terms of growth with just 11% more surveyors seeing their workloads rise rather than fall. However, firms in the area are benefitting from the stronger growth in neighbouring regions with many conducting a substantial proportion of their workload outside of Northern Ireland.

National results



National results



Chartered Surveyor market comments

London

Alastair Jestyn Coke, A Jestyn Coke Chartered Surveyors, London, 01258 454029, ajc@ajestyncoke.co.uk - The continuous switch of schools from local authorities to academy status is affecting programmed repairs in a negative manner.

Craig Murray MRICS, Taylor Wimpey Central London, London, 07469 022117, craig.murray@taylorwimpey.com - We are experiencing real issues with certain building trades in central London and as such we are paying a premium for these services. So much so, as a business we are now looking at alternative building methods to overcome such obstacles in the market.

David Holmes FRICS, Carillion, National, 07702636624, dholmes@carillionplc.com - Insufficiency and quality of resources remain the greatest threats to delivery and growth.

Douglas Beckwith FRICS, Beckwith Mediation LLP, London, 0203 507 0371, douglas@beckwithmediation.com - Disputation continues to arise too readily. The use of alternative dispute resolution would assist but many industry participants are poorly advised as to their options.

Harry L Davies FRICS, Harry Davies Consultant QS, Greater London, 02089585243, harrydavies@f2s.com - Housing costs in South-East UK.

James Knight MRICS, Arcadis, London, 07876396335, james.knight@arcadis.com - Capacity.

John Busby FRICS, Mace Cost Consultancy Limited, London, 020 3522 3000, john.busby@macegroup.com - The number of new enquiries has levelled off. Public sector and high end residential have slowed.

David Flower MRICS, London, 01691600270, djflower@btinternet.com - Planning constraints /time getting approvals/ reluctance to tender competitively.

Olubunmi Odeleye, Instalcom, London, 07795448468, olubunmi6@aol.co.uk - We have just won a major framework so we are expanding. Company capacity has increased by at least 50%.

Paul Arthur MRICS, Turner and Townsend, London, 07736379578, paul.arthur@turntown.co.uk - Churn of employees.

Paul Sherwood MRICS, John Rowan and Partners, London, 02085676995, psherwood@jrp.co.uk - There remains a shortage of construction professionals, hence employment costs continue to add pressure to margin.

Richard Petterson MRICS, Hother Associates LLP, London, 08089477999, rpetterson@hother.co.uk - Demand for suitably skilled QSs remains high.

Simon Rawlinson, MRICS, Arcadis LLP, London, 020 7812 2000, simon.rawlinson@arcadis.com - Our view is that the central London residential development boom will slow during 2016 as some off-plan investors hand their units back. This may undermine the confidence in the level of demand seen in the past 2-3 years.

South East

Chris Tunbridge MRICS, BLB Surveyors Ltd, Brighton, 01273 301888, chris.t@blbsurveyors.co.uk - Proximity to London does impact on available labour resources.

James Le May MRICS, Le May & Co., Twickenham, 020 8893 3341, James@lemayco.co.uk - Planning restrictions are affecting projects.

Jason Farnell FRICS, Commercial Risk Management Limited, London, 01442 270643, jason.farnell@commercialrisk.management - There have been some significant project awards in residential developments in the last three months this will put pressure on supply chain resources and make opportunities outside this sector more attractive.

Mark Richards MRICS, Ridge & Partners LLP, Oxford, 01993 815000, mrichards@ridge.co.uk - Main contractors are continuing to suffer delays due to lack of sub-contractor resources.

Paul French MRICS, Set Square Surveyors, London, 020 7375 6390, paul.french@setsquaresurveyors.co.uk - Workloads continue to rise above expectations which places greater emphasis on finding good calibre resources to service contracted workload.

Robin Goddard BSc FRICS, Brodie Plant Goddard, Dorking, 01306 887070, robin.goddard@bpg.co.uk - Contractors are starting to get busy again. Finding contractors to tender and competitive prices is proving to be challenging once again! Recruiting professional staff at the right levels is also proving to be difficult.

Victor Bradley MRICS, Summers Inman - London Office, London, 0208549 8863, victor.bradley@summers-inman.co.uk - A shortage of suitably experienced and adaptable building surveyors and quantity surveyors is restricting business expansion.

Andrew Horsman MRICS, Faithful+Gould, Newcastle upon Tyne, 01912725150, andrew.horsman@fgould.com - Inflationary pressures are particularly affecting estimates of schemes that have been through a design process of a year or more. As inflation has increased some schemes have become unaffordable. Careful management required.

North East

Bernard David Brian Joyce MRICS, Laing O'Rourke, Newcastle upon Tyne, 07747564335, bjoyce@laingorourke.com - Over supply at main contracting level.

Debra Gridley MRICS, Renvac Scaffolding Limited, Blyth, 01670 828688, debbie@renvac-scaffolding.co.uk - Financial competition at tendering stage is high as competitors are reducing their tender rates and reducing profit margins to win the work.

John Weddell MRICS, Gardiner & Theobald LLP, Newcastle upon Tyne, 01912321327, johnweddell@fsmail.net - Ageing workers.

Michael Foggon FRICS, Faithful+Gould, Newcastle, 01912725150, michael.foggon@fgould.com - Strong demand in education sector but commercial sector still flat.

Michael Henning FRICS, Henning Project Management, Newcastle upon Tyne, 01912612327, michael.henning@henningpm.co.uk - Private sector investment needs to improve. Negative perceptions of the NE are still prevalent.

Paul Reed MRICS, Gentoo Homes, Sunderland (and North East region), 01915255179, reed.paul1@sky.com - Uncertainty over social / affordable housing construction due to 1% year on year rent decrease is having a material effect on projects.

Peter Carruthers MRICS, Summers-Inman Construction & Property Consultants, Newcastle upon Tyne, 01912841121, peter.carruthers@summers-inman.co.uk - Private commercial sector rising. Contractors much more selective when asked to participate in competitive tendering.

Peter Groves MRICS, Peter Groves Cost and Project Management, Newcastle upon Tyne, 01665 606 009, peter.groves@mypostoffice.co.uk - Shortage of new long term projects.

Chartered Surveyor market comments

Richard Quigley MRICS, Thornton Firkin LLP, Newcastle upon Tyne, 01912327318, richardquigley@thorntonfirkin.com - Tender fees still tight!

North West

Anthony Dillon MRICS, Willmott Dixon Construction, Manchester, 01619473960, anthony.dillon@willmott Dixon.co.uk - Despite the confidence in the market place, supply chain capacity remains a challenge. Both main contractors and the supply chain are choosing framework and two stage opportunities over single stage procurement.

Brian Boys MRICS, B & E Boys Ltd., Rossendale, 01706 211 368 - Housing market activity has restricted access to key trades at busy times. Activity in Manchester market is encouraging but we are currently experiencing a slight dip in enquiries and job starts. Talking to others, locally this is not uncommon.

Brian Williams MRICS, Baqus, Manchester, 0161 881 5216, brianpw@fletchermcneill.co.uk - There is a real dearth of contractors of a moderate size at the moment, making tender levels even higher.

Charles Nixon FRICS, Thornber & Walker, Preston, 01772 722288, charlesnixon@thornberandwalker.co.uk - Planning approvals, even for schemes where no neighbourhood objections are raised, are becoming long and tortuous with planners leaving it to the last minute before considering a submission and then asking for the approval period to be extended.

Gordon Clark FRICS, IMaPS, Johnstons (Cumbria) Ltd, Carlisle, 01228 520137, gordon@johnstons.co.uk - The recent flooding has had a great effect on the ability to move easily around the county and will undoubtedly impinge upon material deliveries, transport and labour costs.

Kevin Eccles FRICS, Countess of Chester Hospital NHS Foundation Trust, Chester, 01244 365865, kevin.eccles@nhs.net - The hospital continues to cope with sustained pressure on services. As a result space is at a premium. Works programme reviews have resulted in innovative ways of responding to this pressure. Strategic plans are being developed in partnership.

Mark McCulley MRICS, J Murphy & Sons Ltd, Manchester, 01942725326, markmcculley@hotmail.co.uk - Government decisions on infrastructure spending delaying the start of projects.

Peter Vinden, The Vinden Partnership, Bolton, 01204 362888, pvinden@vinden.co.uk - We have been heavily involved in the storm events in Cumbria.

Richard Barnes FRICS, Veritas Surveying Limited, Manchester, 07958 996375, rbarnes@veritassureying.co.uk - Disputes are starting to emerge from the larger projects won at the depths of the recession. There does however seem to be an eagerness to resolve these matters swiftly and to concentrate on new work.

Stephen Gittins MRICS, Ridge & Partners LLP, Liverpool, 01512360946, sgittins@ridge.co.uk - The pre-cast concrete frame/panel market is very buoyant and delivery times are stretching to the point where it may well start to affect construction programmes.

Yorkshire & Humber

Chris Greenwood MRICS, NPS Group, Hull, 01482 816150, christopher.greenwood@nps.co.uk - Central government house building initiatives should focus on housing for rent as well as private 'affordable' property.

David Bishop MRICS, DBA Project and Cost Consultancy Ltd, Doncaster, 01302 719919, enquiries@dbamanagement.co.uk - Utilities continue to remain an issue in terms of cost and delivery certainty.

Ian Tomlinson BSc FRICS, Rex Procter & Partners, Leeds, 0113 243 3731 - Workload on the up and expected to continue. Slight concern over EU referendum, may impact later in 2016.

Jonathan Park MRICS, Appleyard & Trew, Harrogate, 01423 871471, jon.park@applewardandtrew.co.uk - Contractors are evaluating enquiries more thoroughly before agreeing to tender. Medium size contractors are becoming busier and requiring more skilled resources.

South West

Andy McNeile MRICS, Turner & Townsend LLP, Cheltenham, 07931172253, andrew.mcneile@turntown.co.uk - Nuclear new build and decommissioning workload showing growth with new resource vacancies being advertised daily.

David Gillard MRICS, Jenkins Hansford Partnership, Exeter, 01392 255066, jhpexeter@btconnect.com - Continued shortage of labour and long lead times on certain materials together with financial constraints make for a challenging period in the construction sector

David Rose FRICS, David Rose FRICS, Bristol, 01179620846, ruchazie@icloud.com - There is great uncertainty across the construction industry generally; more positive and inspirational national and local government would certainly help and might prove the catalyst the country and our industry needs.

Martyn Stubbs MRICS, Nixey Powell Partnership Limited, Bath, 01225 424213, martynstubbs@nixeypowell.co.uk - The housing sector has continued to be the main area of construction activity. There have been some early signs of interest in investment in the commercial sector in terms of factory and office developments.

Nicholas A Trolley MRICS, ACIArb, RMaPS, Dickson Powell Partnership, Bristol, 01179732431, n.trolley@dicksonpowell.co.uk - The banks and institutions appear to be dipping their toes back into development funding.

Simon Large FRICS, Magna Partnership Limited, Cirencester/Gloucestershire, 01285640460, simon.large@magna.cc - Planning delays due to staff shortages is a constant concern, deadlines are rarely met. Utility service connections are another area of excessive lead-in times. Over cautious funds and their advisors also hinder project delivery times.

Wales

John Peel MRICS, J O Peel & Associates, Aberystwyth, 01970 625355, johnnorlandopeel@hotmail.com - Nothing significant, apart from the weather and financial constraints.

Mark Downer MRICS, WYG, Mold, North Wales, 01352706207, mark.downer@wyg.com - Sustained workload in private sector works with a small number of local contractors with sufficient experience and capacity. This has not impacted adversely on tenders / projects yet but remains a concern. Lack of QSs is hampering recruitment.

Neil Taylor FRICS, ChandlerKBS, Cardiff, 029 2035 2300, ntaylor@chandlerkbs.com - Commercial market is improving.

Nick Soady MRICS, RPA, Cardiff, 0845 602 2780, nick.soady@rpagroup.co.uk - Upcoming tariff reductions on solar energy are having a very damaging effect on renewables sector.

Chartered Surveyor market comments

Robert Fisher BSc MRICS, Robert Fisher Limited, Swansea, 01792720010, info@robertfisherlimited.co.uk - Large speculative developments by larger developers in Swansea may put pressure on supply and demand of labour but some concerns over the new legislation on sprinklers. Anecdotal suggestions that some may slow down output as sprinkler costs unknown.

West Midlands

Adrian Aston FRICS, Wakemans Limited, Birmingham, 0121 454 4581, a.aston@wakemans.com - Fluctuating tenant demand.

Bruce Johnson MRICS, WM Housing Group, Birmingham, 0300 790 6555, bruce.johnson10@btinternet.com - Traffic volumes are on the increase; this combined with major infrastructure works in city centre and on motorway is causing delays to site deliveries and staff getting to and from work/client meetings.

Garrie Weatherley MRICS, DBK Partners Ltd, Birmingham, 0121 622 8520, gweatherley@dbkltd.com - Early involvement and commitment of contractors and supply chain is the essential factor in ensuring pre-construction timescales are met. Contractors are being extremely selective in tendering.

Lee Jones MRICS, Quantem Consulting Llp, Birmingham, 01212339222, lee.jones@quantem.co.uk - Procurement routes being led by the contracting market, meaning that there are fewer willing to competitively bid.

Mark Smith MRICS, Turner & Townsend, Birmingham, 0121 2621100, mark.smith@turntown.co.uk - Skills shortage is continuing to put pressure on project delivery which is resulting in increased prices and some lethargy in the supply chain.

Peter Cole MRICS, Peter Cole Cost Management Ltd, Lichfield, 01543252758, peter@petercolecm.com - I specialise in projects within the health sector, so my responses reflect this sector. I have seen a marked increase in activity in recent months.

Phil Hodges MRICS, Ridgeways, Redditch, 01527894514, phil@ridgewaysqs.co.uk - Extended slow down and gear up for the festive period affects productivity more than ever.

East Midlands

David Morris BSc, MRICS - Director, Tompkins Robinson Surveyors, Wellingborough, 01933 223307, davidm@tompkinsrobinsonsurveyors.co.uk - Lack of sites preventing provision of affordable housing. Seems to be a cooling down in the industry generally.

Ian Cooper MRICS, Armsons, Derby, 01332 558935, ian.cooper@armsons.com - Construction costs continue to rise as contractors and particularly subcontractors are busy whilst still facing shortages of skilled labour and technical staff. We are seeing contractors struggling with subcontractor tender responses.

Mark Deakin MRICS MAPM BSc (Hons), Turner & Townsend, Nottingham, 0115 947 0997, mark.deakin@turntown.co.uk - Public procurement rules continue to affect interest from constructors. Plenty of work around albeit the East Midlands is slow in comparison to other regions, however profit levels are still muted.

Paul Meadows MRICS, Salus Approved Inspectors, Leicester, 03338005678, paul.meadows@salusai.co.uk - There is a massive under resourcing in terms of bringing talented new professionals into construction consultancy. Government could massively encourage entry to the sector.

Robert Spencer FRICS, Sir William Baird & Partners, Derby, 01332 347203, rspencer@sirwilliambaird.co.uk - There is much city centre activity, particularly in the private residential sector.

Eastern

Barry Tiplady, Sheriff Tiplady Associates, Coton, 01954 212299, b.tiplady@sta-camb.co.uk - Considerable new development around Cambridge which is affecting all resources of companies in construction, design etc.

Chris Keeble DipProjMan MRICS, Gill Associates, Ipswich, 01473 214646, ckeebled@gillassociates.co.uk - We have seen a marked upturn in enquiries and workload in the last 3 months which, given that Christmas is fast approaching, is encouraging.

John Allen FRICS, Colchester, 01206 548043, jaysuk@btinternet.com - Inconsistent and slow planning approval affecting start-up of new projects/developments.

Raymond Burch FRICS, Marstan BDB, Cambridge, 01799 531251, ray.burch@marstanbdb.com - Contractors are increasingly choosy about which projects they will tender for - assembling and maintaining tender lists is increasingly challenging.

RJ Franklin MRICS, Robinson & Hall LLP, Bedford, 01234 352201, rjf@robinsonandhall.co.uk - Looking forward and hoping for a prosperous 2016.

Scotland

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

Brian Donaldson MRICS, Thomas and Adamson, Edinburgh, 0131 225 4072, brian.donaldson@thomasandadamson.com - Appears to be many opportunities coming through for tier 1 contractors, currently and in the future. Two stage and partnering more prevalent at that level but not so much within projects which attract tier 2 contractors.

David Taylor FRICS, CBA QS LTD, Glasgow, 0141 248 5802, david.taylor@cba-qs.co.uk - The industry continues to be busy and that has created a shortage of professional staff at all levels. We are also finding contractors are busy and are increasingly selective in which projects they tender for.

Ewen Ross MRICS, Ellmoll Builders Ltd., Glasgow, 0141 949 1200, ewenross29@googlemail.com - As a bricklaying subcontractor, bricklayers are scarce due to a great reduction in apprentices during the downturn.

George Mackie MRICS, Ogilvie Construction Ltd, Stirling, 01786 812 273, george.mackie@ogilvie.co.uk - Single stage procurement procedures no longer offer best value for clients and the industry must move towards a more collaborative approach to delivering high quality affordable projects.

Iain McBroom MRICS, Brownriggs, Stirling, 01786 464998, iain.mcroom@brownriggs.co.uk - Continued strong demand experienced across all sectors.

John Meechan FRICS, Gardiner & Theobald LLP, Glasgow, 0141 568 7300, j.meechan@gardiner.com - Whilst there has been improvement in activity there is still uncertainty due to political factors e.g. the PRS sector is seen as a growth area but some developers are uncertain on the Scottish governments policy on rent control.

Chartered Surveyor market comments

John Strachan MRICS, Samuel & Partners, Inverness-Shire, 01397 702686, john@samuelandpartners.co.uk - Political uncertainty over European and possible second Scottish referendum is having a negative effect on confidence. Rural market is still flat.

Neil Donald MRICS, Neil Donald Limited, Aberdeen, 07870 517781, neil@neildonald.co.uk - Oil prices and therefore oil company activity is reduced.

Ronald S Dool FRICS, Turner & Townsend, Glasgow, 01412215358, ronnie.dool@turntown.co.uk - Little perceivable improvement within the region in relation to recovery and economy virtually flat-lining. Further impacted by impending local government and Holyrood elections.

T McQuade MRICS BSc, Morham & Brochie, Oban, 01631 563721, tommy@morhambro.co.uk - Procurement rules and PQQ are having a significant effect on small business' as our networks are being eroded and low scenes for things like turnover are negating the huge influence on projects we can have due to local knowledge.

William Bowie, Doig + Smith, Glasgow, 0141 241 4600, wbowie@doigandsmith.co.uk - Contractors workloads continue to increase resulting in an overheating in the supply chain and difficulty in receiving an adequate number of tender returns. Inflationary pressures remain high across all elements.

Northern Ireland

Adrian Petticrew MRICS, McNicholas Construction Services limited, Belfast, 02890834101, adrian.petticrew@hotmail.com - Public expenditure cuts affecting infrastructure projects. Public procurement procedures delaying award of tenders for projects and frameworks. Overall the economy in N.Ireland remains sluggish and lagging behind the rest of the UK.

George Williamson MRICS, Brian Canavan Associates, Coleraine and surrounding area, 028 70358484, geordiewilliamson@hotmail.com - Restrictions on borrowing by potential funders, especially in the residential market.

John Reid MRICS, KS&P, Belfast, 02890650009, johnreid.ksp@googlemail.com - The increased activity in London and the South East is attracting skilled tradesmen from N Ireland.

Kerr Houston MRICS, Johnston Houston, Belfast, 02890330133, kerr.houston@johnstonhouston.com - At a local level, the lack of major public sector infrastructure investment is a major barrier for future workload. However, the release of the Irish Capital Plan is likely to create opportunity in the medium term.

William McQuillan MRICS, FCM Partnership, Belfast, 028 90 455188, wmcquillan@fcmpartnership.com - Government getting back into work again.

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Notes to editors

About:

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

Total contributions in Q4 2015=291

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)
 - Has your company used BIM over the last three months and if so in which of the following areas? (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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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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