

Q1
2020

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FEDERATION OF
**MASTER
BUILDERS**

fmb.org.uk



STATE OF TRADE SURVEY

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Foreword

Builders entered 2020 hopeful for a more stable future. The start of a new decade, however, has brought challenges that no one could have predicted.



BRIAN BERRY, Chief Executive,
Federation of Master Builders

Almost half a million people left the construction sector as a result of the 2008-09 financial crash. The FMB is determined to avoid a repeat of this devastating blow to livelihoods, and our great industry, this time.

The Federation of Master Builders (FMB) carried out its latest State of Trade survey in the midst of the coronavirus (COVID-19) lockdown. We asked our respondents to consider their experiences of workload, prices, and employment in the period February to April this year, as the whole country began to experience the impacts of the pandemic.

The effects of the coronavirus outbreak on an industry that faced immediate shutdown due to social distancing requirements are reflected sharply in this report. Nine in ten (93%) FMB members reported output constraints due to coronavirus. Seven in ten (71%) received lower levels of enquiries from February to April, compared to the previous quarter. Four fifths (82%) said they expected material costs to increase over the next three months.

On one reading, these results are not unexpected. The historic fall in GDP, as the economy was all but shut down, has prompted equally historic levels of state intervention, and a determination to support the recovery.

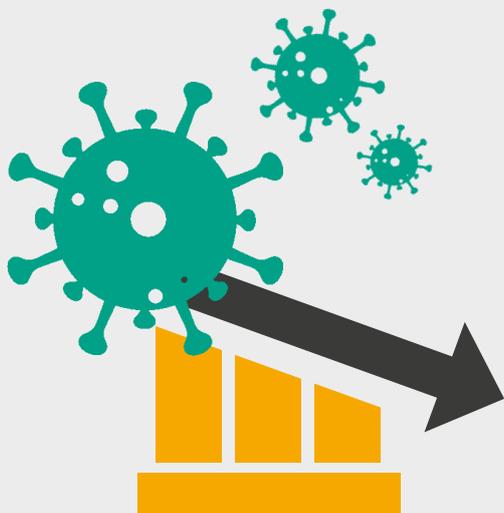
Almost half a million people left the construction sector as a result of the 2008-09 financial crash. The FMB is determined to avoid a repeat of this devastating blow to livelihoods, and our great industry, this time.

The coronavirus tragedy has brought FMB members together to work through shared struggles, and pool our energies as we plan the path, tentatively, towards recovery. With the repair, maintenance and improvement (RM&I) part of the market hit hardest, I am pleased that the FMB has been asked to chair a recovery working group on RM&I by the Construction Leadership Council. We are taking similar leadership roles to support the recovery in Scotland, Northern Ireland and Wales.

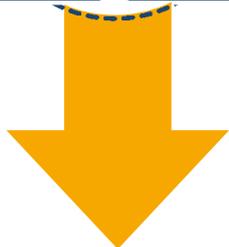
To support a more positive State of Trade in the second half of 2020, we need to see a VAT cut on repair and maintenance and moves towards a national retrofit strategy. Policy makers must do more to support small and medium-sized (SME) builders deliver the homes the country needs. We need to support SMEs properly to deliver invaluable training for construction apprentices, and we need to champion quality construction. We *can* build our way out of this crisis, and we must put SME builders at the heart of the recovery.

We are very happy to be partnering with Savanta ComRes for the continued production of our State of Trade analysis, the only survey of its kind to focus exclusively on SME firms throughout the construction sector.

Key statistics



93%
of FMB members say
that the impact of
the **coronavirus**
is **constraining**
their **output**



42%
report that
the number
of **specialist**
tradespeople
within their firm
decreased over the
last three months

82%
of FMB members
say that they
expect **material**
costs to **increase**
over the next
three months



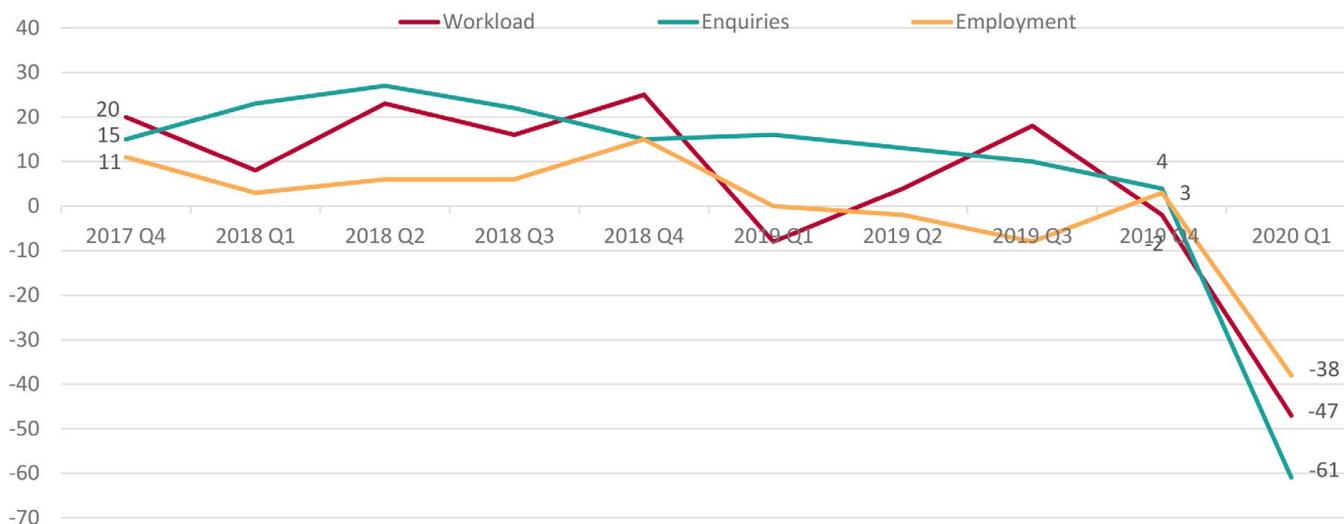
43%
of SMEs are
forecasting
lower
workloads

71%
of SMEs
reported a
lower level of
enquiries

Key Indicators

All of the key indicators have seen a sharp decrease in the net balance since Q4, 2019 (Graph 1).¹

Key indicators total (Net balance)



Graph 1 - Q3. Looking back, how does your company's workload in the period February – April 2020 compare to that in November 2019 – January 2020? Q6. Looking back, how has the level of enquiries regarding future work changed in the period February – April 2020 compared to November 2019 – January 2020? Q8. How has the number of employees within your company's workforce changed during February - April 2020, when compared with November 2019 - January 2020? Base: Total (n=351)

The net balance of workload, the number of enquiries received, and the change in number of employees within respondents' companies have all seen historically sharp falls in the start of 2020, in all nations of the UK. It is hard not to suspect the influence of the COVID-19 crisis on these figures.

The number of enquiries that respondents received over the past three months has seen the most notable drop, from positive territory in Q4 2019 (+4), to -61 in Q1 2020. This is mirrored by the results of the FMB member surveys carried out during the lockdown, finding that 64% of builders saw a drop in enquiries and 96% stopped some, or all, of their work on site.

The majority of FMB members reported a decrease in their number of employees, resulting in a net balance of -38. While we know that 69% of FMB members made use of the Coronavirus Job Retention Scheme, before this was introduced 9% of members had already made redundancies, equating to 58 individuals losing their jobs. For many FMB members who are directors of small limited companies, income support hasn't been available.

We are very worried about how long the construction industry will take to bounce back as our commercial customers are already starting to close down and our domestic customers (which we rely on to see us through any quiet periods) are holding off on jobs. We are also getting far fewer enquiries.

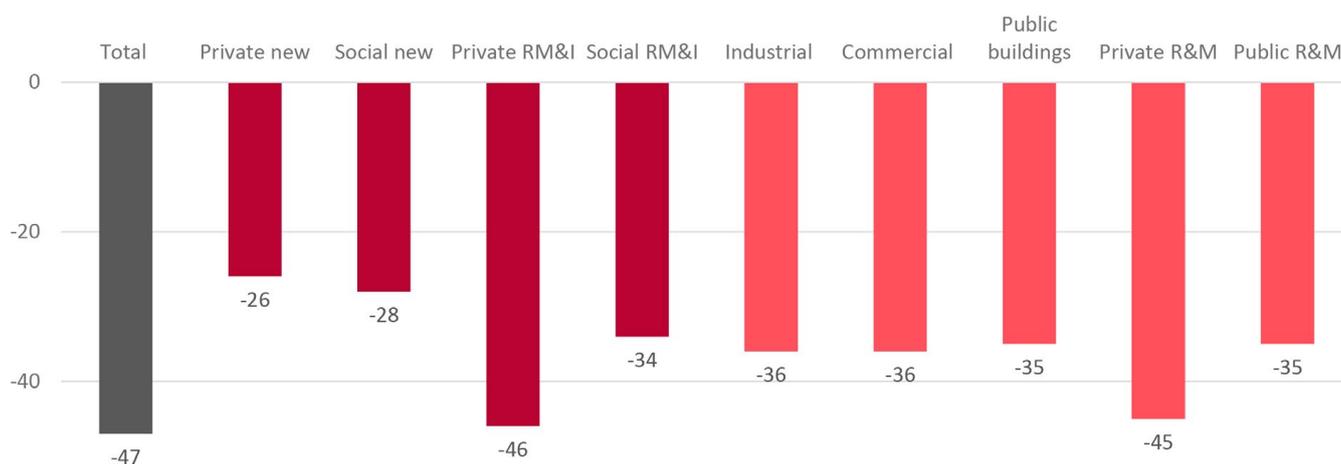
FMB member, 18 March

¹ The net balance refers to the difference between the percentage of respondents stating 'higher' and those replying 'lower' to the survey questions.

Workload, expected workload and enquiries

Workload

Workload by sector (Net balance)



Graph 2 - Q3. Looking back, how does your company's workload in the period February – April 2020 compare to that in November 2019 – January 2020? Base: Total (n=351); Private new build (n=158); Social new build (n=86); Private RM&I (n=270); Social RM&I (n=101); Industrial (n=106); Commercial (n=142); Public buildings (n=104); Private R&M (n=154); Public R&M (n=106). Excluding N/As

■ Residential
■ Non-residential

The net balance for workload is in the negative territory for SMEs across all sectors. The net balance for private RM&I (repair, maintenance and improvement) fell by 49 percentage points to -46, the lowest of all the residential sectors (Graph 2).² The proportion of members reporting a decreased total workload rose from 21% to 58% in the first quarter of 2020. The proportion who said that their workload has risen fell from 19% to 11%.

Within the residential sector, those working on private new builds have been able to maintain relatively higher workloads than other sectors over the past three months, with the net balance of -26. This is because there is greater capacity to observe social distancing rules and work safely in an outdoor environment than those working in occupied properties. Additional barriers relating to supply of materials and access to finance have, nevertheless, provoked a drop in workloads.



House builders that can safely keep sites open are struggling to get the materials and workforce they need on site. This means it's taking much longer to build each house.

FMB member, 28 April

² 'RM&I' refers to repair, maintenance and improvement, and 'R&M' refers to repair and improvement.

Residential workload

Approaching three in five (57%) FMB members in the private RM&I sector report lower workloads over the past three months, while just one in ten (11%) say that their workload increased (Table 1). The net balance for private RM&I fell by 49 percentage points to -46, the lowest of all the residential sectors.

Workload in the social RM&I sector has also seen a notable decrease in the past three months. Slightly smaller falls occurred in both the private and social new build sectors.

However, despite the sharp decrease in net balance, the majority of those working in the private new build, social new build and social RM&I sectors say that there was no change in their workload over the past three months (54%; 68%; 64% respectively).

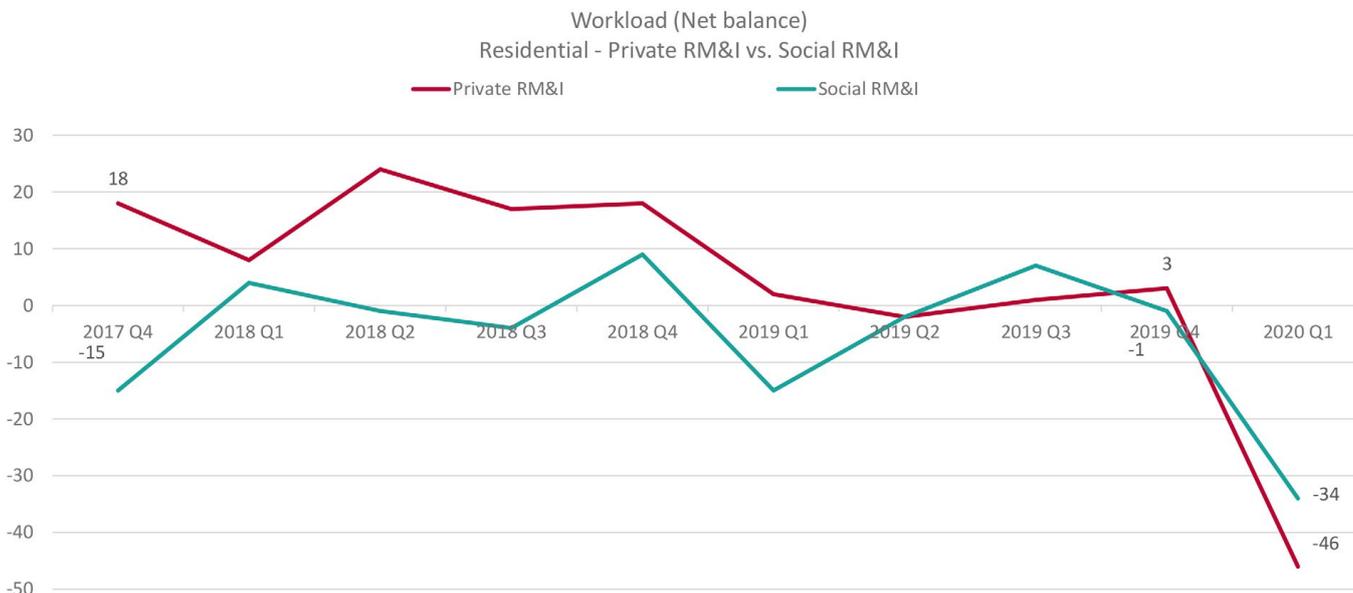


The net balance for private RM&I fell by 49 percentage points to -46, the lowest of all the residential sectors.

Workload	Workload									
	Q4	2018 Q1	Q2	Q3	Q4	2019 Q1	Q2	Q3	Q4	2020 Q1
Private new	+1	-3	+11	+8	+20	-9	+2	+1	-5	-26
Private RM&I	+18	+8	+24	+17	+18	+2	-2	+1	+3	-46
Social new	-17	-14	-4	-6	+1	-10	+5	+2	-3	-28
Social RM&I	-15	+4	-1	-4	+9	-15	-2	+7	-1	-34
Total Residential	+11	-1	+12	+5	+22	-9	+6	-1	+1	-48

Table 1 - Q3. Looking back, how does your company's workload in the period February – April 2020 compare to that in November 2019 – January 2020? Base: Private new build (n=158); Private R&MI (n=270); Social new build (n=86); Social RM&I (n=101); Total residential (n=305)

Residential workload (continued)



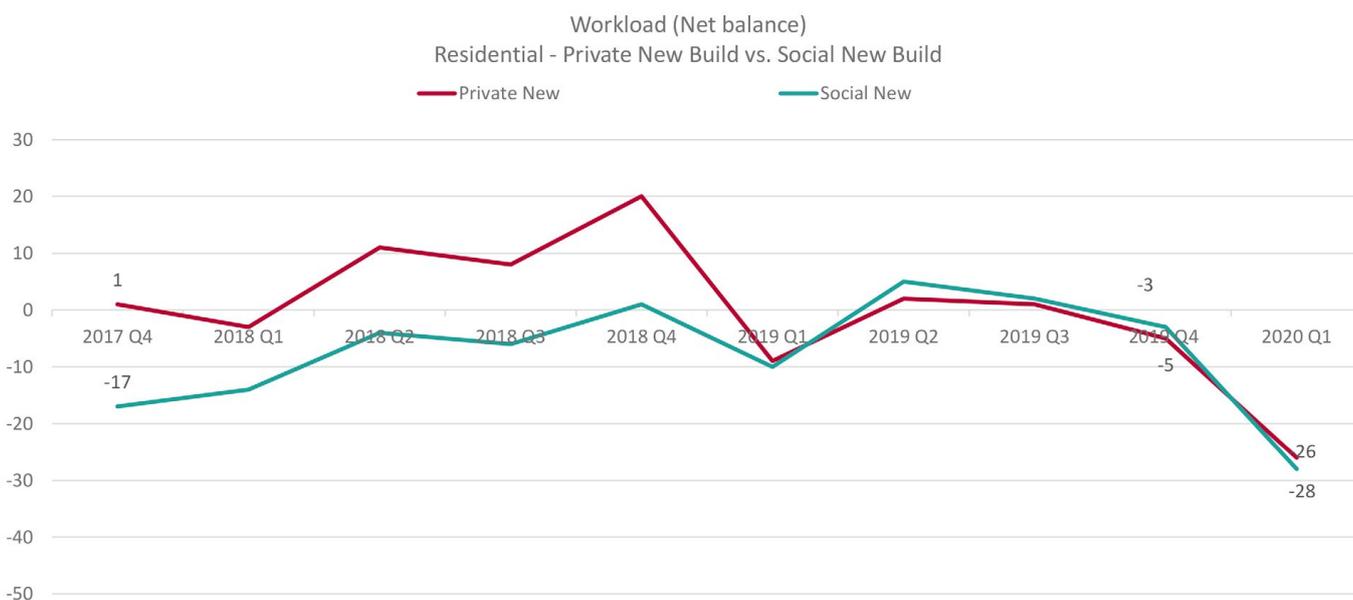
Graph 3 - Q3. Looking back, how does your company’s workload in the period February – April 2020 compare to that in November 2019 – January 2020? Base: Private new build (n=158); Private R&MI (n=270); Social new build (n=86); Social RM&I (n=101)

Anecdotally we know some members operating in social RM&I continued their operations during the lockdown, however with lower productivity (Graph 3). This could be due to the need to continue providing critical or emergency works to residents during the lockdown.

In early May, we asked members if they were likely to adapt their business services as a result of the coronavirus pandemic. A small sample of respondents reported that they were considering transition into the social new build sector in case of a hardening of the private new build sector as a result of the virus.



Project and photo by FMB member Kiesel Group Ltd



Graph 4 - Q3. Looking back, how does your company’s workload in the period February – April 2020 compare to that in November 2019 – January 2020? Base: Private new build (n=158); Private R&MI (n=270); Social new build (n=86); Social RM&I (n=101)

Non-residential Workload

Workload	Q4	2018 Q1	Q2	Q3	Q4	2019 Q1	Q2	Q3	Q4	2020 Q1
Public buildings	-7	-5	+1	+8	+2	-23	-10	-8	+2	-35
Industrial	+7	0	+3	+11	0	-27	-10	-8	-6	-36
Commercial	+19	+6	+3	+15	+16	-27	-6	-10	+5	-36
Public R&M	-3	-3	-2	-7	-7	-27	-14	-2	+5	-35
Private R&M	+6	+2	+7	+5	+10	-8	-20	-8	-5	-45
Total Non-Residential	+16	-2	+9	+22	+10	-22	-3	-4	+7	-43

Table 2 - Q3. Looking back, how does your company's workload in the period February – April 2020 compare to that in November 2019 – January 2020? Base: Public new build (n=104); Public R&M (n=106); Industrial (n=106); Commercial (n=142); Private R&M (n=154); Total non-residential (n=183)

There has been a sharp fall in the net workload balance across the non-residential sector since Q4, 2019 (Table 2).

Two in five (40%) of those who work in public buildings say the workload has decreased over the last three months while just 5% say it has increased. In the industrial sector, two in five (41%) reported a decrease in workload over the past three months and just 5% reporting an increase.

Experience of workload change in the commercial sector appears to have been mixed over the past 12 months. One in ten (11%) report higher workloads, slightly higher than the industrial sector. However, half (47%) say their workload was lower resulting in a net balance of -36, 41 percentage points lower than in Q4, 2019.

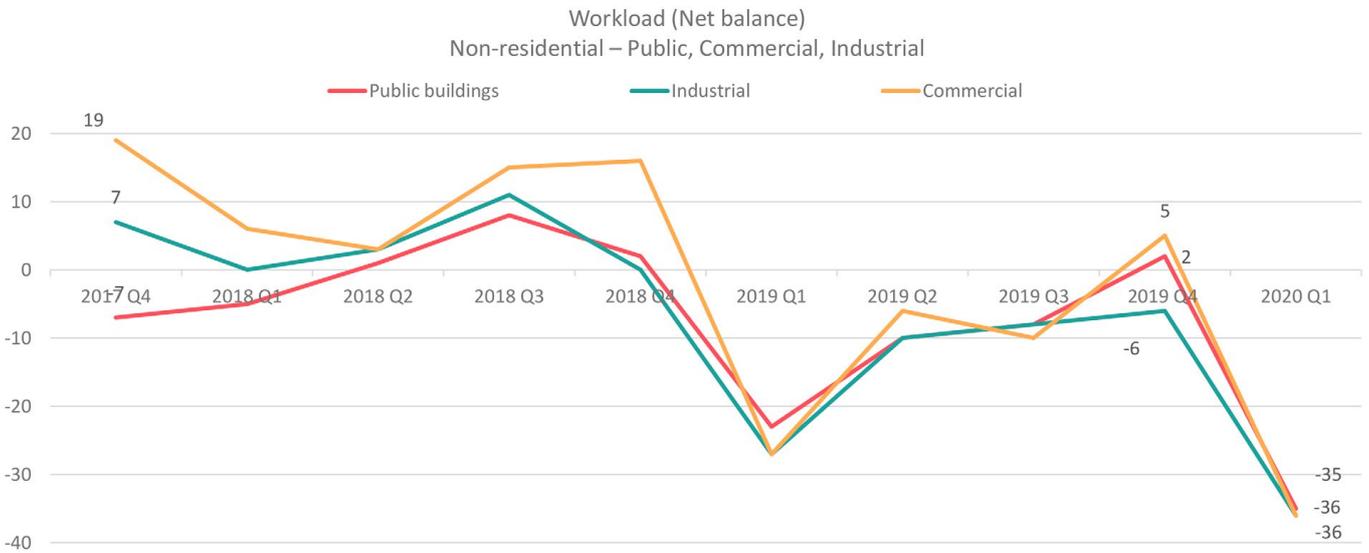
Anecdotally we know FMB members operating in the non-residential private sectors have, in part, done so to help provide essential services during the pandemic. We also know there has been some contractual pressure for firms to continue operating.



We are contractually forced to go back to work as the Government has said construction is business as usual.

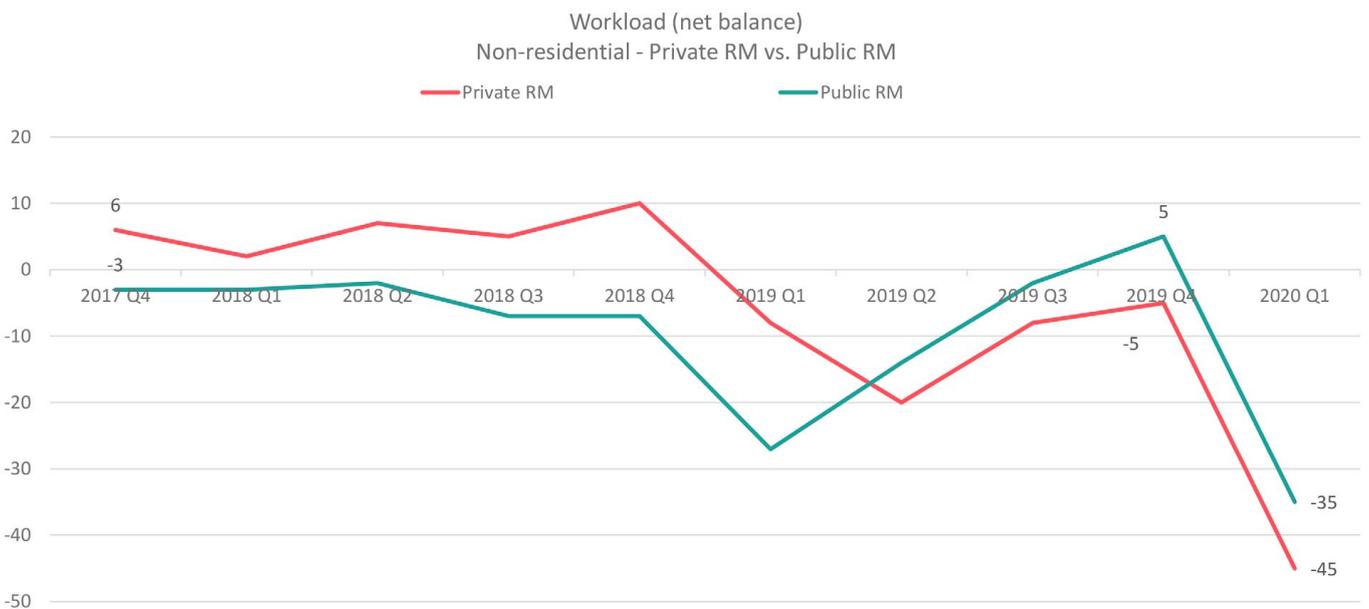
FMB member, 24 April

Non-residential workload (continued)



Graph 5 - Q3. Looking back, how does your company’s workload in the period February – April 2020 compare to that in November 2019 – January 2020? Base: Public new build (n=104); Public R&M (n=106); Industrial (n=106); Commercial (n=142); Private R&M (n=154)

The most notable decrease in net balance across non-residential work was in the commercial sector, which fell by 41 percentage points (Graph 5).



Graph 6 - Q3. Looking back, how does your company’s workload in the period February – April 2020 compare to that in November 2019 – January 2020? Base: Public new build (n=104); Public R&M (n=106); Industrial (n=106); Commercial (n=142); Private R&M (n=154)

Expected workload

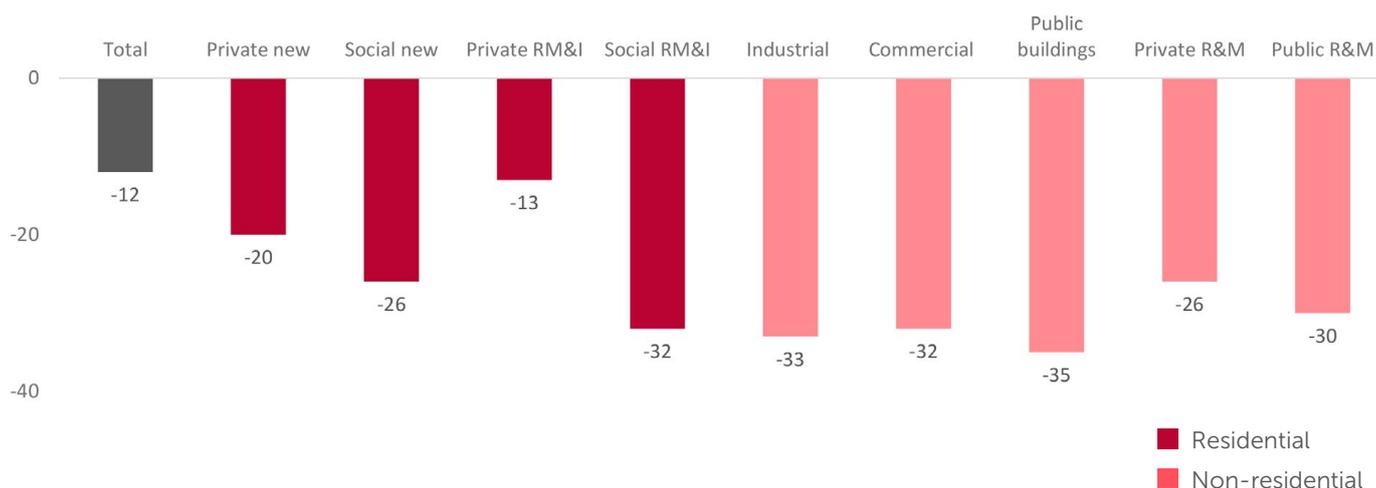
The net balance for total expected workload is -12 (Graph 7). FMB members are split on this, with three in ten (31%) expecting a higher level of workload over the next three months, and just over four in ten (43%) forecasting a lower level of workload.

From speaking to members across the UK, we know that there are varying levels of optimism as industries start thinking about economic recovery from the impact of the virus. While some builders are reporting that the market is quite buoyant, others are concerned that a second peak of coronavirus infections could hamper recovery. The ability to forecast is made more uncertain by the unknown impact that the forthcoming recession could have, particularly on the jobs market.

Within the residential sector, those working on social R&MI are the least optimistic about amount of work they forecast for their company over the next three months (Graph 7).



Expected workload by sector (Net balance)



Graph 7 - Q4. Looking forward, how do you expect your company's workload in the period May - July 2020 to compare with that in February - April 2020? Base: Private new build (n=184); Social new build (n=107); Private RM&I (291); Social RM&I (n=126); Industrial (n=137); Commercial (n=161); Public buildings (n=133); Private R&M (170); Public R&M (n=132) Excl N/As

While some builders are reporting that the market is quite buoyant, others are concerned that a second peak of coronavirus infections could hamper recovery.

Expected workload (continued)

The net balance for expected workload is generally lower among non-residential FMB members compared to those in the residential sector (Tables 3 and 4).

The net balance for total residential workload is -19. Among those working in the residential sector, the social RM&I industry is the least likely to be anticipating a higher amount of workload over the next three months (7%) with a net balance of -32.

Conversely the outlook is more positive in the private RM&I industry, where a quarter (28%) are expecting a higher amount of workload. However, the net balance is still firmly in negative territory at -13.

Firms operating predominantly in the industrial, commercial and public R&M (repair and improvement) sectors are most likely to be expecting less workload over the next three months.



Residential	Q4	2018 Q1	Q2	Q3	Q4	2019 Q1	Q2	Q3	Q4	2020 Q1
Private new	-3	+28	+20	+10	+4	+11	+18	+17	+7	-20
Private RM&I	+12	+31	+36	+18	0	+23	+10	+14	+13	-13
Social new	-3	+5	+8	-2	+6	+8	+6	+3	-6	-26
Social RM&I	-2	+14	+4	+4	-1	+4	+8	+8	+7	-32
Total Residential	+12	+28	+20	+11	+12	+11	+18	+5	+10	-19

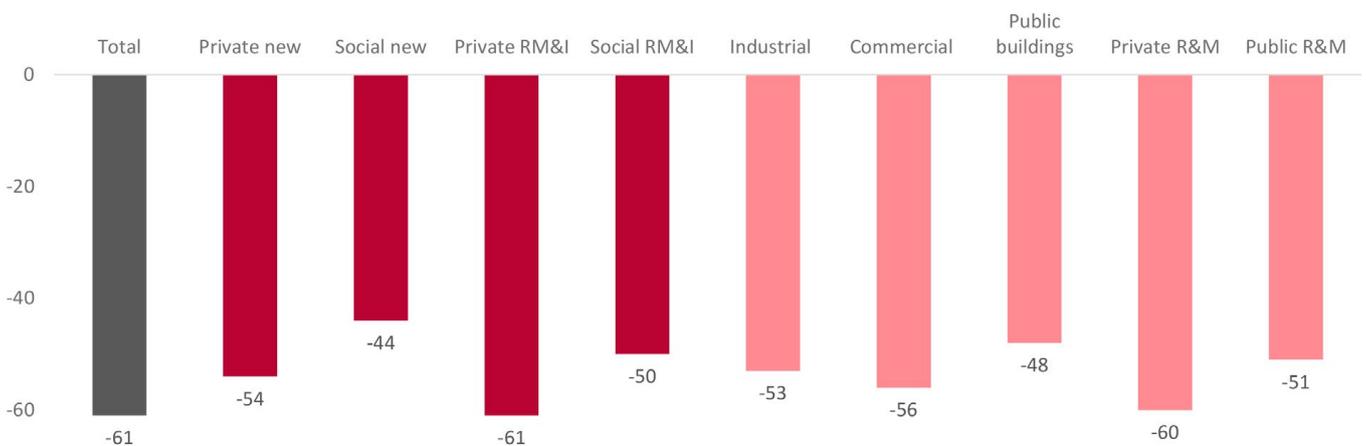
Non-residential	Q4	2018 Q1	Q2	Q3	Q4	2019 Q1	Q2	Q3	Q4	2020 Q1
Public buildings	+2	+9	+8	-10	-13	+3	+2	-19	+12	-26
Industrial	+7	+15	-3	+5	+11	-13	0	-10	+7	-33
Commercial	+13	+32	+11	+2	+10	+4	+9	0	+20	-32
Public R&M	+3	+5	+8	-9	-6	-3	-2	-5	+10	-32
Private R&M	+3	+16	+15	+6	+2	+11	+3	-2	+17	-13
Total Non-Residential	+10	+19	+12	0	+12	-7	+6	-4	+7	-29

Tables 3 and 4 - Q4. Looking forward, how do you expect your company's workload in the period May – July 2020 to compare with that in February – April 2020? Base: Private new build (n=184); Social new build (n=107); Private RM&I (n=291); Social RM&I (n=126); Industrial (n=137); Commercial (n=161); Public buildings (n=133); Private R&M (n=170); Public R&M (n=132) Excl N/As

Enquiries



Enquiries by sector (Net balance)



Graph 8 - Q6. Looking back, how has the level of enquiries regarding future work changed in the period February - April 2020 compared to November 2019 - January 2020? Base: Private new build (n=192); Social new build (n=97); Private RM&I (n=284); Social RM&I (n=114); Industrial (n=126); Commercial (n=161); Public buildings (n=121); Private R&M (169); Public R&M (n=123) Excl N/As

■ Residential
■ Non-residential

The majority of FMB members say that the total level of enquiries was lower over the first part of 2020 than in the previous quarter. Levels of enquiries about future work (for the months April-June 2020) are also reported as very low in all parts of the industry. The lockdown restrictions were introduced on 23 March and this had an immediate impact on activity. These restrictions are still slowly being lifted at the time of writing.

The net balance for total enquiries is firmly in the negative territory at -61 (Graph 8). The majority of FMB members (71%) say that the total level of enquiries for future work was lower, with just one in ten (10%) saying that the level of enquiries increased.

Those working in the residential private RM&I and non-residential private R&M sectors have both experienced a lower level of enquiries than any other area (Tables 5 and 6).



Enquiries

Residential	Q4	2018 Q1	Q2	Q3	Q4	2019 Q1	Q2	Q3	Q4	2020 Q1
Private new	+4	+18	+24	+12	+7	-3	+6	-3	-3	-54
Private RM&I	+8	+18	+25	+20	+7	+11	+12	+9	+6	-61
Social new	-17	+13	-2	+6	+12	-3	-1	-16	-11	-44
Social RM&I	-9	+5	-1	+2	+8	+5	0	-6	+6	-50
Total Residential	+10	+15	+16	+17	+12	-2	+9	-5	0	-62
Non-residential										
Public buildings	-3	+7	+2	+3	-9	-18	-1	0	-5	-48
Industrial	+4	+6	0	+7	-1	-13	-12	-8	+2	-53
Commercial	+15	+12	+15	+6	+9	-7	-3	+3	+3	-56
Public R&M	-3	+6	+1	+4	0	-8	-11	-2	+4	-51
Private R&M	+4	+10	+9	+1	+7	+9	-5	+2	+6	-60
Total Non-Residential	+14	+3	0	+13	+5	-5	-5	-1	-1	-58

Tables 5 and 6 - Q6. Looking back, how has the level of enquiries regarding future work changed in the period February – April 2020 compared to November 2019 – January 2020? Base: Private new build (n=192); Social new build (n=97); Private RM&I (284); Social RM&I (n=114); Industrial (n=126); Commercial (n=161); Public buildings (n=121); Private R&M (169); Public R&M (n=123) Excl N/As



Output

The coronavirus crisis is having a significant impact on SME businesses in the construction industry. Nine in ten FMB members (93%) say that the coronavirus is constraining their firm's current output, and a similar proportion (87%) expect this to be the case over the next 12 months (Graph 9).

Two thirds (66%) say that material/equipment shortages are constraining output, and a similar percentage believe they will continue to do so over the next 12 months. This is corroborated by data gathered through FMB member surveys conducted throughout March, April and May. Asking what factors are most likely to limit a return to work on site, almost nine in ten Master Builders (89%) told us that that access to materials was a challenge. Particular shortages

reported include plasterboard (66%), PPE (53%), concrete and aggregates (21%) and timber (21%). The FMB has been participating in an industry group to help coordinate the reopening of the supply chain.

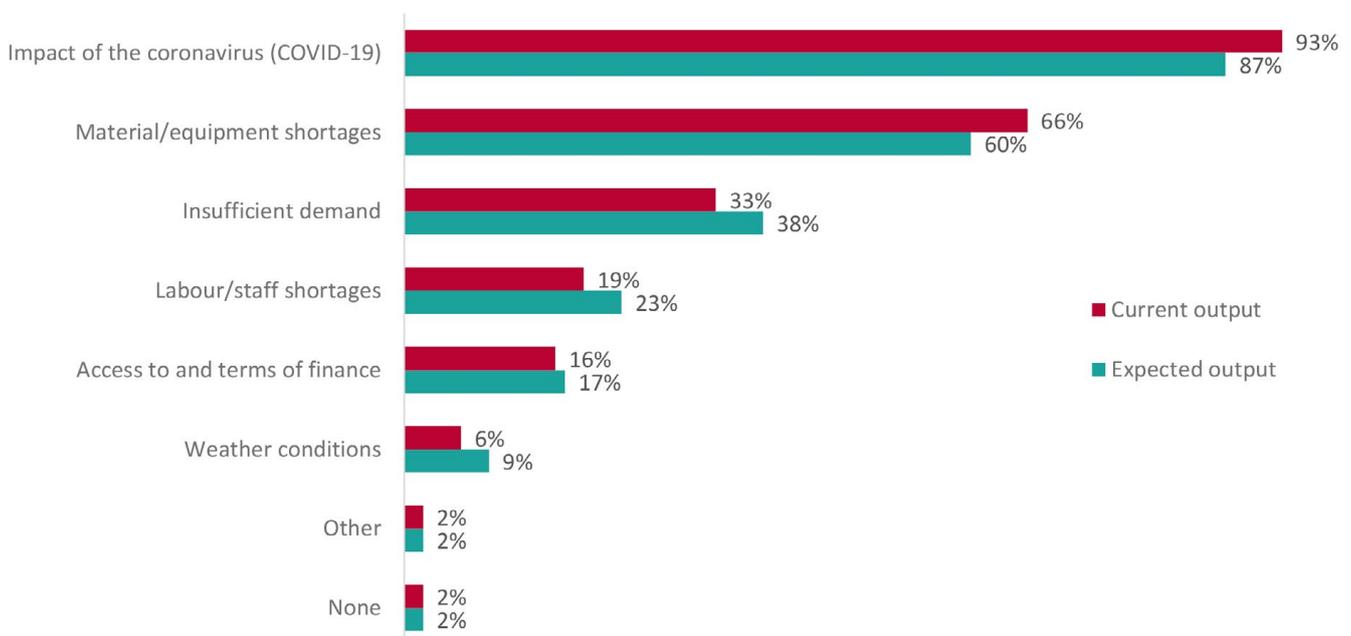
One third of FMB members (33%) say that their company's output is being constrained by insufficient demand, rising slightly when asked to look ahead over the next 12 months (38%).

Labour shortages are less likely to be viewed as a factor constraining current and expected output (19% and 23% respectively). Access to finance registers as having a relatively low impact on firms' output. This picture indicates a continued improvement for SMEs in this regard, as compared to the experience of the 2008-09 financial crash.

We will financially struggle should lockdown continue for any longer than 11 May 2020. I can safely work in isolation but can't get materials... Clarity needs to be given and material supplies need to be available.

FMB member, 24 April

Factors constraining output (% saying the following)
Current and expected output



Graph 9 - Q5. Which of the following factors, if any, are currently constraining your company's output, and what would you say is most likely to constrain output over the next 12 months? Base: Total (n=351)

Prices & costs

Actual prices & costs

The net balance for both output prices and wages and salaries have fallen sharply since Q4, 2019, while materials costs have remained consistent (Graph 10).

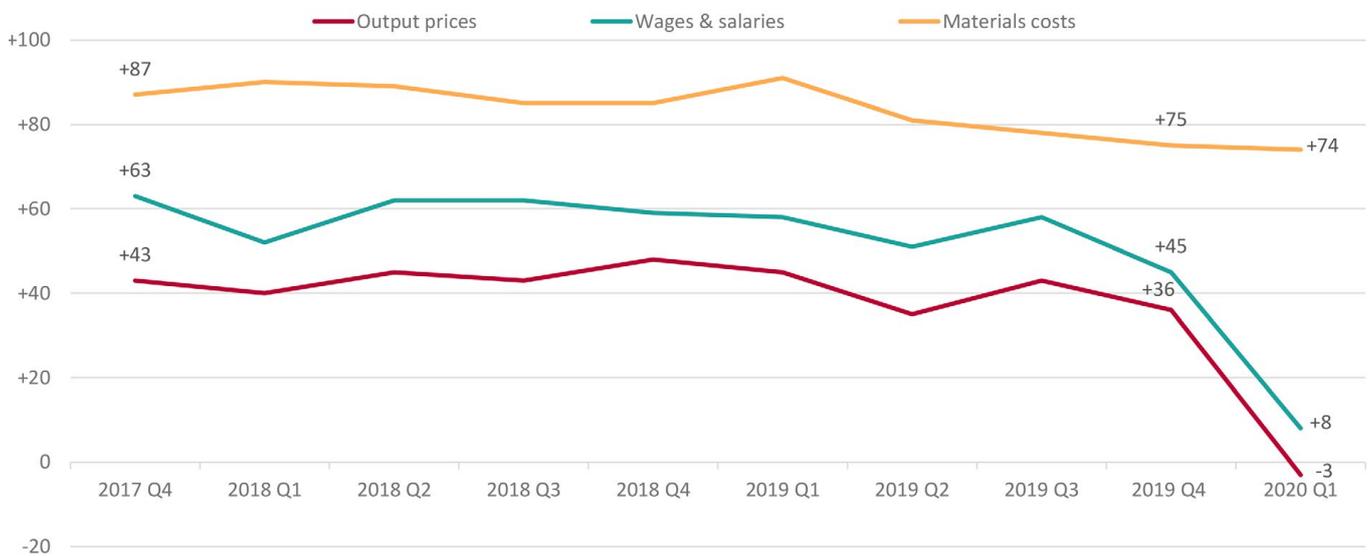
There has been a sharp reduction in the proportion of FMB members who expect output prices to increase, down from 63% to just 12% in Q1, 2020. Data on wages and salaries reveals a similar decline. These trends could suggest a contraction in the market.

Presenting a challenge for construction firms, materials costs have remained consistent since Q4, 2019 at +74. Three quarters of FMB members (76%) report that materials costs increased, while just 2% say that costs decreased.



I anticipate contracts taking longer than normal due to the increased delivery times and therefore prices may have to be adjusted to periods of inactivity.
 FMB member, 29 May

Actual prices & costs (Net balance)



Graph 10 - Q11. How have both the prices that you charge, and your costs changed over the period of February - April 2020? Base: Output prices (n=338); Wages & salaries (n=341); Materials costs (n=326) Excl N/As

Expected prices & costs

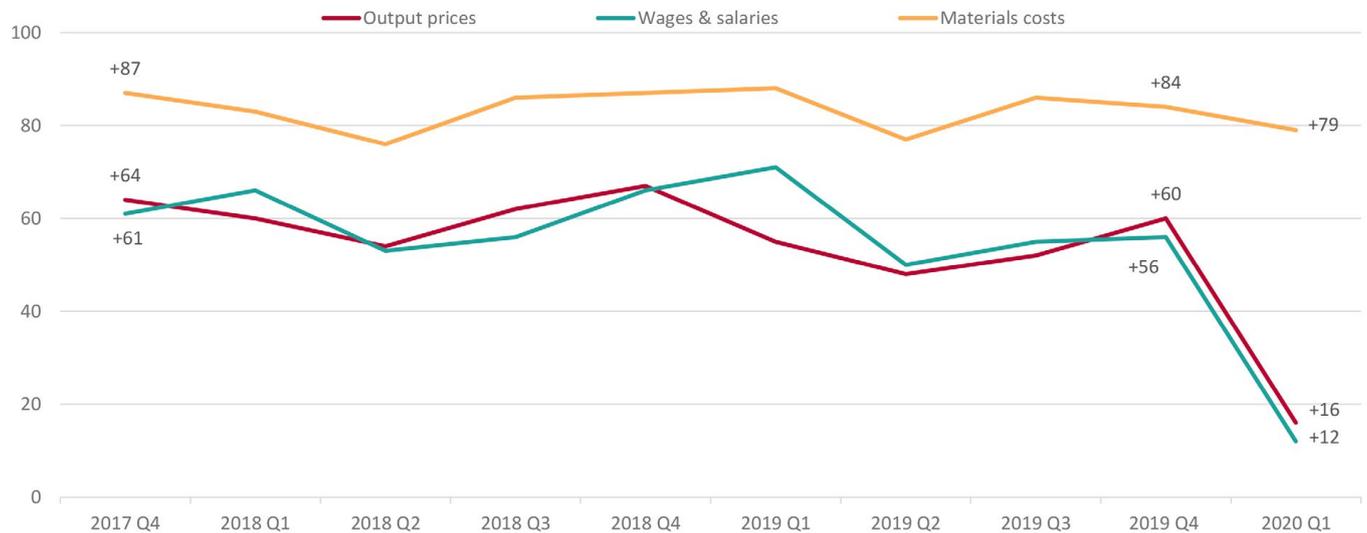
The net balance for expected output prices has decreased by 44 percentage points in the first quarter of 2020 to +16. A third of FMB members (34%) expect higher output prices over the next six months, down from 63% in Q4, 2019. One in five (18%) say they expect the prices they charge to decrease (Graph 11).

The net balance for expected wages and salaries has also fallen sharply from +56 in Q4, 2019 to +12 in Q1, 2020. A quarter of FMB members (24%) expect wages to increase in the next three months, while one in ten (11%) expect them to decrease.

Four in five FMB members (82%) say that they expect materials costs to increase over the next three months, while 2% expect them to decrease, resulting in a net balance of +79.



Expected prices & Costs (Net balance)



Graph 11 - Q12. And how do you expect both the prices that you charge, and your costs to change over the period of May - July 2020? Base: Output prices (n=337); Wages & salaries (n=332); Materials costs (n=324) Excl N/As

Employment and labour

FMB members report that employment over the past three months has been notably lower than in the preceding three-month period, in particular among those employing specialist workers (Graph 12).³ Just 2% say that the number of specialists within their firm increased over the last three months, while two in four (42%) say that the number of specialists decreased.

The net balance for the number of builders (as opposed to specialists) working within respondent's workforce also dropped notably from -1 in Q4,

2019 to -35, remaining in negative territory for the fourth consecutive wave of research. Just 3% say that the number of builders in their workforce increased while 38% say that this decreased.

Net balance for expected employment is higher than that of current employment. However, it has fallen firmly into negative territory. One in seven respondents (14%) expect the number of builders within their workforce to increase over the next three months, whereas three in ten (29%) expect this to decrease.

With net balance for both builders and specialists below zero, it is clear FMB members do not expect their workforce to recover significantly over the coming months.

Current employment (Net balance)



Graph 12 - Q8. How has the number of employees within your company's workforce changed during February - April 2020, when compared with November 2019 - January 2020? Base: Total employment (n=340); Builders (n=340); Specialists (n=324) Excl N/As



³ Builders refers to a general labourer that might be able to cover a number of roles or do general tasks. While specialists work in specific skilled areas (ie. Bricklayer, roofer).

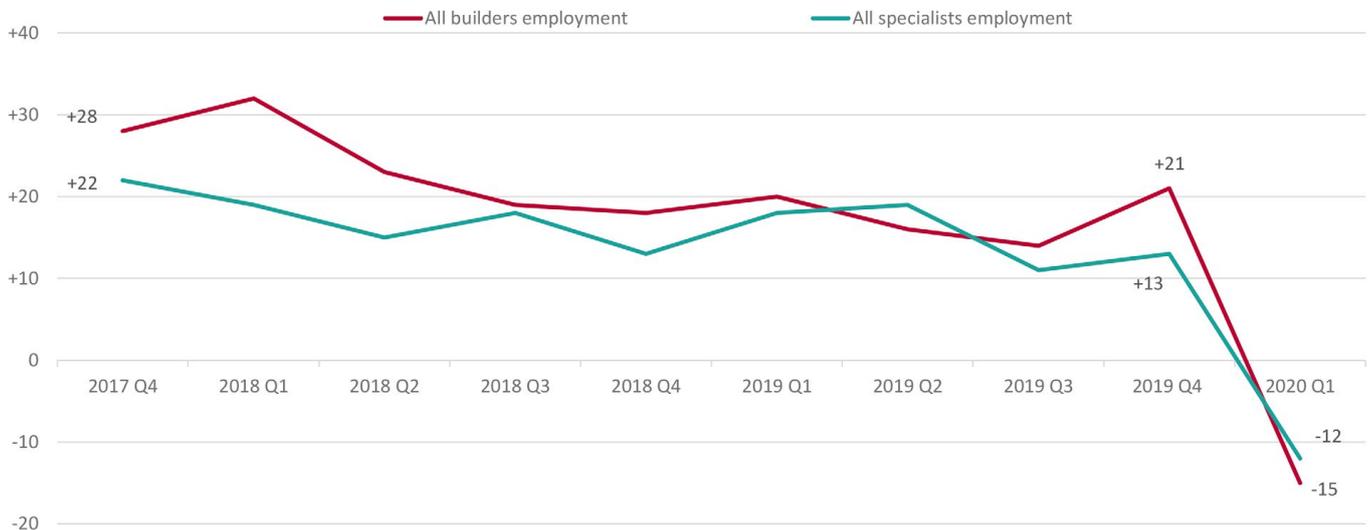
Employment and labour (continued)

Policies supporting post-coronavirus economic recovery are needed that focus on job retention and creation. The FMB is developing and lobbying for the implementation of national energy efficiency retrofit strategies across all the home nations to boost growth in local markets and create thousands of new jobs. These strategies will also help to improve the quality of the UK's housing stock and achieve the country's legally-binding net zero target by 2050.

FMB members are less likely to report difficulty in recruiting skilled staff across all occupations than in Q4, 2019 (Graph 14). This could reflect the reduction in current and expected workload, resulting in firms having less need to be hiring new skilled staff; or indicate supply exceeding demand in the job market as more workers are made redundant.

We couldn't replace a trainee due to Brexit, and COVID has made it worse.
FMB member, 1 April

Expected employment (Net balance)



Graph 13 - Q9. How do you expect the number of employees within your company's workforce to change over the period of May - July 2020? Again, please select one answer for both builders and specialists? Total employment (n=340); Builders (n=340); Specialists (n=324) Excl N/As



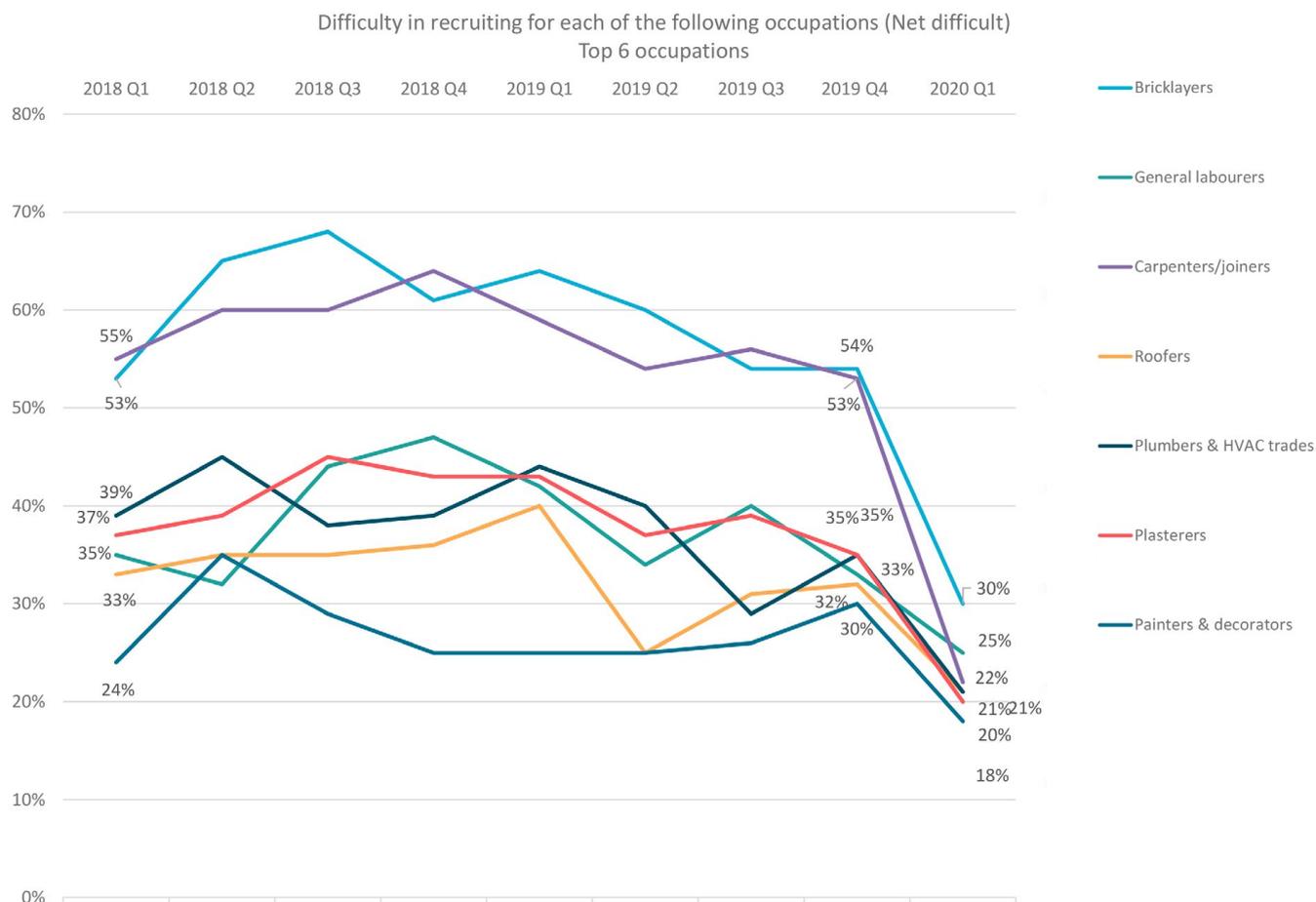
Employment and labour (continued)

Bricklayers remain the most difficult occupation for firms to recruit with 30% reporting difficulty recruiting in this role (Graph 14). However, it is notable that shortages are considerably lower than in recent surveys.

Despite these figures, we know that there construction continues to face a skills shortage. There is a chronic lack of new entrants coming into the industry. The number of starts on construction apprenticeship has been decreasing year on year since 2015/16. There is also an aging workforce in construction. The combination of these two factors, taken together with the proportion of the current workforce hailing from the European Economic Area which is set to change with the UK's post-Brexit immigration system, demonstrates key skills shortages facing the industry.

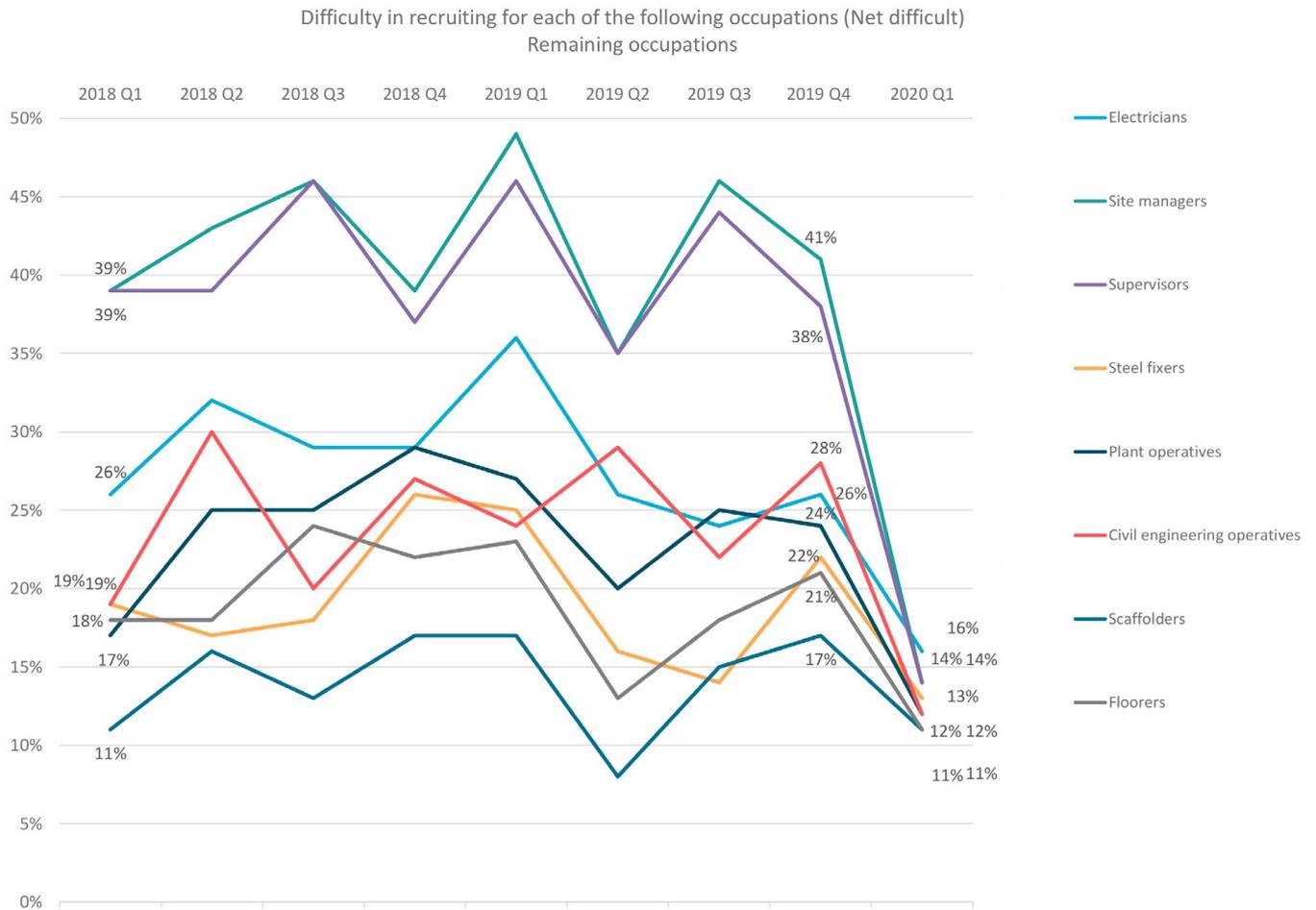


Project and photo by FMB member Three Pines Building Co Ltd



Graph 14 - How difficult, if at all, has your company found it to recruit skilled staff in each of the following occupations over the period of February - April 2020? Base: Total (n=351)

Employment and labour (continued)



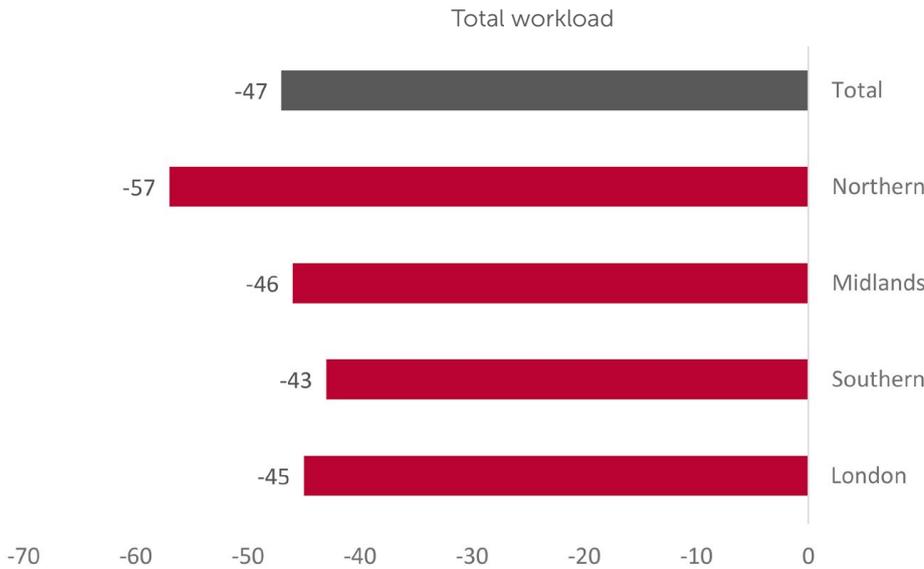
Graph 15 - How difficult, if at all, has your company found it to recruit skilled staff in each of the following occupations over the period of February - April 2020? Base: Total (n=351)



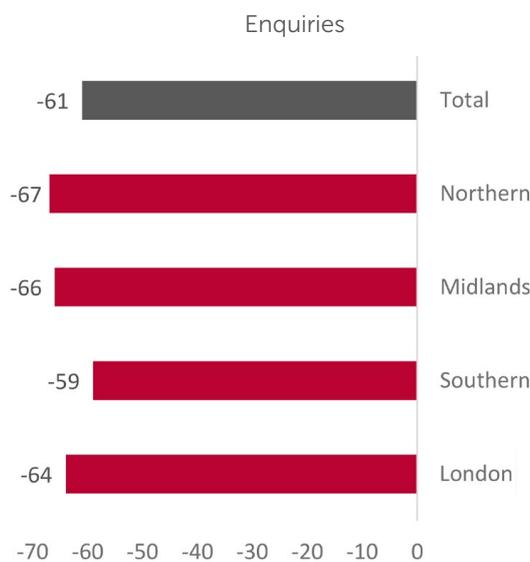
Regional and national perspectives

English regions

The net balance for all English regions is in negative territory (Graphs 16 to 18). Those working in the North of England report slightly lower levels of workload (-57), and enquiries regarding future work (-67) compared to all other regions. In terms of the expected workload forecasted for the next three months, the net balance is lowest in the Midlands (-17). Conversely the net balance in Greater London is just -5.



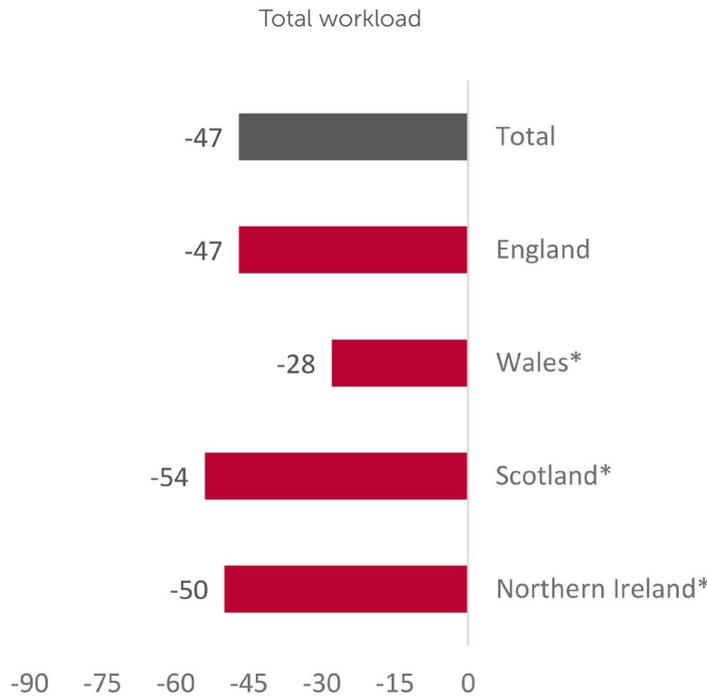
Graphs 16 – 18 - Q3/ Q4/ Q6. Base: Northern (n=61); Midlands (n=69); Southern - including Greater London (n=159); Greater London (n=40)



National perspectives

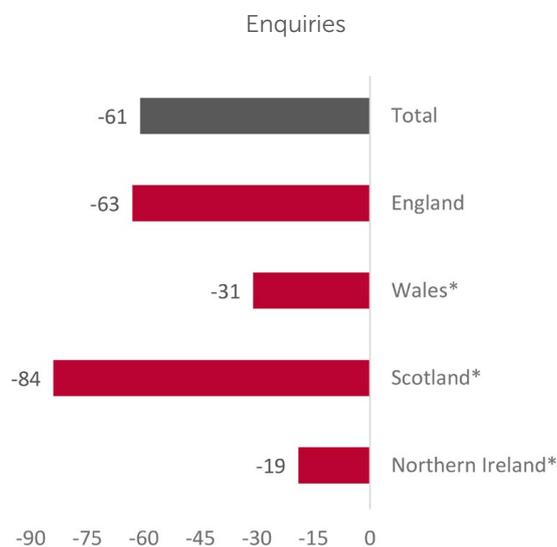
Those working in Scotland report slightly lower levels of workload (-54), expected workload (-37) and enquiries regarding future work (-84) compared to all other nations in the UK (Graphs 19 to 21).^{*} Conversely, those working in Wales appear to have had a slightly more positive experience over the past three months. Total workload for those from Wales is higher than all other nations at -28, while the expected workload is in positive territory (+32). While in Northern Ireland, total workload was in negative territory at (-50).

It is important to note that these national-level findings are indicative only due to the smaller base sizes for the devolved nations.



Project and photo by FMB member MCK Construction Ltd

Graphs 19 – 21 - Q3/ Q4/ Q6. Base: England (n=289); Wales (n=21); Scotland (n=25); Northern Ireland (n=16)
*Caution: Low base size

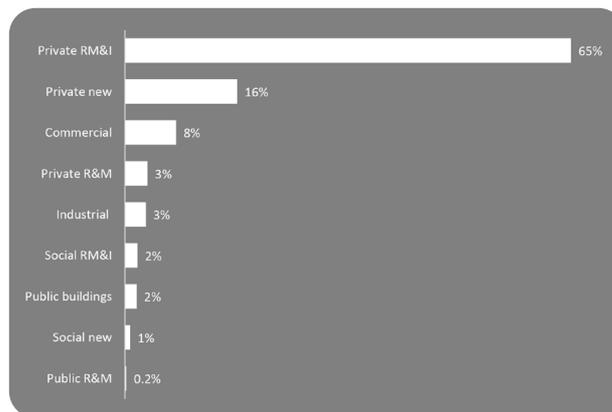


Appendix

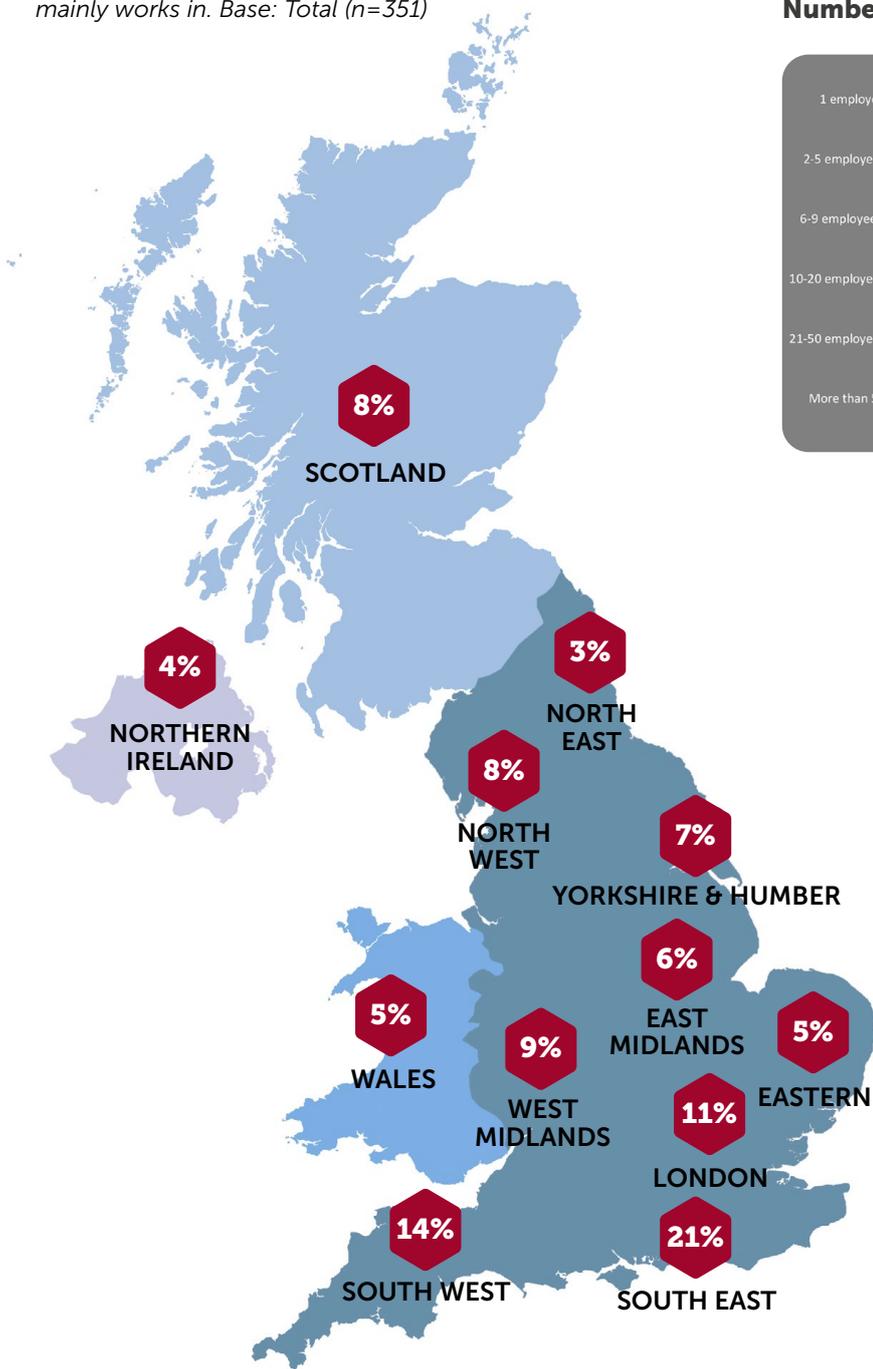
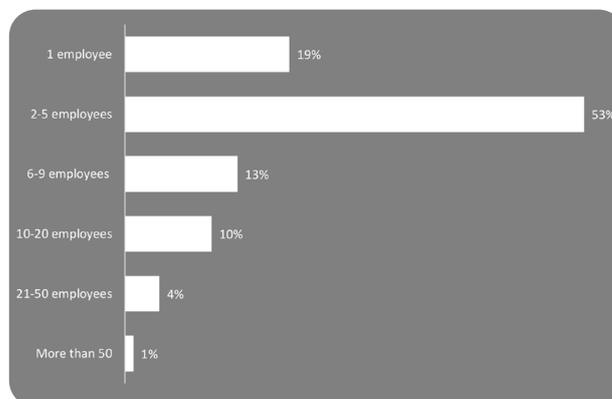
Respondent profile

Graphs 22 – 24 - Q1. In the months February - April 2020, approximately what % of your company's work was done in each of the following sectors? Q7. To the best of your knowledge, how many of the following are employed on your sites at present, including any of the workforce you may have furloughed due to the coronavirus (COVID-19)? Q2. Please indicate which region your company mainly works in. Base: Total (n=351)

Sectors worked in (mean % for each sector)



Number of employees



NET: Northern - 18%
NET: Midlands - 20%
NET: Southern - 46%
NET: Wal/Sco/NI - 16%



About the Federation of Master Builders (FMB) and the State of Trade Survey

For more than 30 years, the FMB's State of Trade Survey has monitored key indicators in the UK construction industry. It identifies current workload, predicts future short-term developments, and examines the level of employment. It is the only survey of its kind to focus exclusively on small and medium-sized (SME) firms throughout the construction sector. The questions are dispatched via an online survey to the entire membership every quarter.

This quarter, the survey was issued between 29 April and 15 May 2020 and received 351 completes. It was published in June 2020.

The typical firm responding is either a general builder or building contractor that, on average, directly employs between two to five people, and turns over between £200,000 and £500,000 per annum. Throughout the report, results are presented as net balance. This is the difference between the percentage of respondents stating 'higher' and those replying 'lower' to these questions.

The FMB is the largest trade association in the UK building industry. Established in 1941 by a consortia of SME building firms, the FMB is independent, non-profit organisation, lobbying continuously for members' interests at both national and local levels.

The FMB is a source of knowledge, professional advice and support for its members, providing a range of modern and relevant business services to save them time and money. The FMB also offers practical advice and support to the general public on choosing and working with a builder.

For more information about the FMB please visit: www.fmb.org.uk.
For more information about the FMB State of Trade Survey please email publicaffairs@fmb.org.uk.

For more information about Savanta ComRes please contact: Harry King,
Consultant on: Harry.King@Savanta.com

Savanta:
ComRes

June 2020

fmb.org.uk