

Q2  
2020

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FEDERATION OF  
**MASTER  
BUILDERS**

[fmb.org.uk](http://fmb.org.uk)

# STATE OF TRADE SURVEY

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## Foreword

The Federation of Master Builders (FMB) carried out its latest State of Trade Survey at the end of a difficult but optimistic summer, as debates about the 'build back better' agenda and a 'new normal' rippled around the country.



**BRIAN BERRY**, Chief Executive,  
Federation of Master Builders

We asked our members to consider their experiences of workload, prices, and employment in the period June to August this year, as construction started to emerge from the lockdown, albeit at different paces in different nations.

The coronavirus outbreak has been an unprecedented and challenging time for small to medium-sized (SME) construction firms, but the findings of this survey are a testament to the resilience of builders and their ability to bounce back. 42% of SMEs are forecasting higher workloads and 50% are reporting a higher level of enquiries.

Builders are casting ahead to what Brexit will mean for business. Deal or no deal, 78% of respondents to this survey are anticipating that material prices will rise over the next few months.

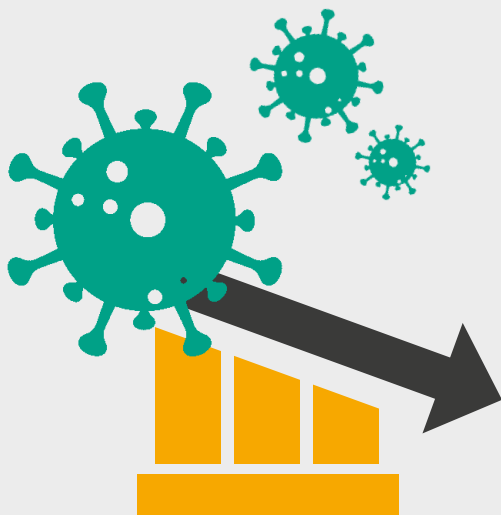
While we can see clear signs of recovery, employment still lags. This is especially pertinent given the growing concerns over unemployment and the focus in Parliament of developing stimulus policies that support jobs and apprenticeships.

This is an important time to encourage young people or career changers into construction. We all know that the industry faces a skills shortage, and we have a unique moment to help people into employment at the same time as the Government's recovery agenda is 'build, build, build'.

Local builders train 71% of the industry's apprentices, and support for employers to train should therefore be directed at SMEs. The FMB is advocating stronger links between colleges and employers, so that apprenticeship opportunities are more easily identified and communicated, and so that we better support our tradespeople leading the onsite training. The Government's recent commitment to support adult lifelong learning is welcome, and construction courses should be made a priority.

**78% of respondents are anticipating that material prices will rise.**

## Key statistics



**74%**

of SMEs say that the impact of the **coronavirus** is currently constraining their firm's output – down from 93% in 2020 Q1



**78%**

of SMEs expect the number of builders within their firm to stabilise over the next two months

**78%** of SMEs say that they expect material costs to increase over the next two months



**42%**

of SMEs are forecasting higher workloads

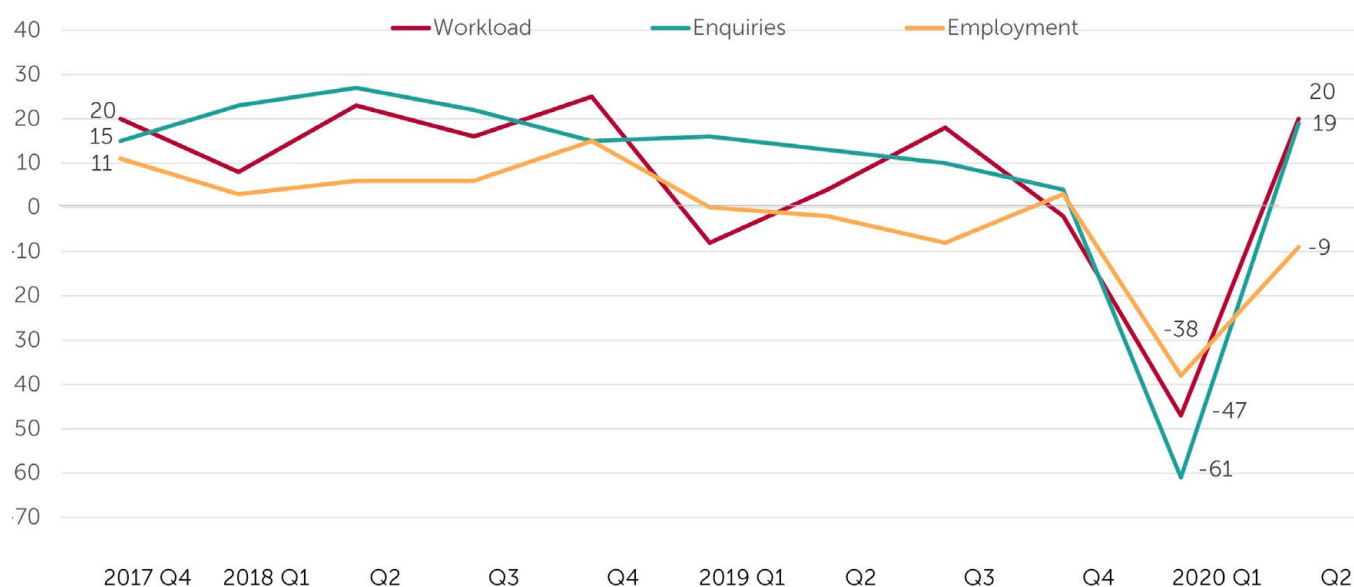
**50%**

of SMEs reported a higher level of enquiries

# Key indicators

Headline figures show that builders' workload, enquiries and employment have stabilised in the period June to August. All three of these key indicators have seen an increase in the net change since Q1 2020 (Graph 1). The change refers to the difference between the percentage of respondents stating 'higher' and those replying 'lower' to the survey questions.

Key indicators total (Net balance)



**Graph 1** - Looking back, how does your company's workload in the period June – August 2020 compare to that in March – May 2020? Looking back, how has the level of enquiries regarding future work changed in the period June – August 2020 compared to March – May 2020? How has the number of employees within your company's workforce changed during June – August 2020, when compared with March – May 2020? Base: All respondents, excluding N/A (n=160)

Workloads and enquiries have increased in the period June to August, with 47% of respondents reporting a rise in workloads and 50% reporting a higher level of enquiries in Q2 compared to Q1.

The vast majority of FMB members (78%) report no change in their number of employees, but with 16% reporting

a lower number of employees there is a change of -9 across the industry. That employment levels continue to contract is consistent with the findings of national datasets that are reporting higher levels of unemployment. ONS statistics, released in September, found that UK unemployment was at 4.1% in the period May to July 2020, higher than the year previous.<sup>1</sup>

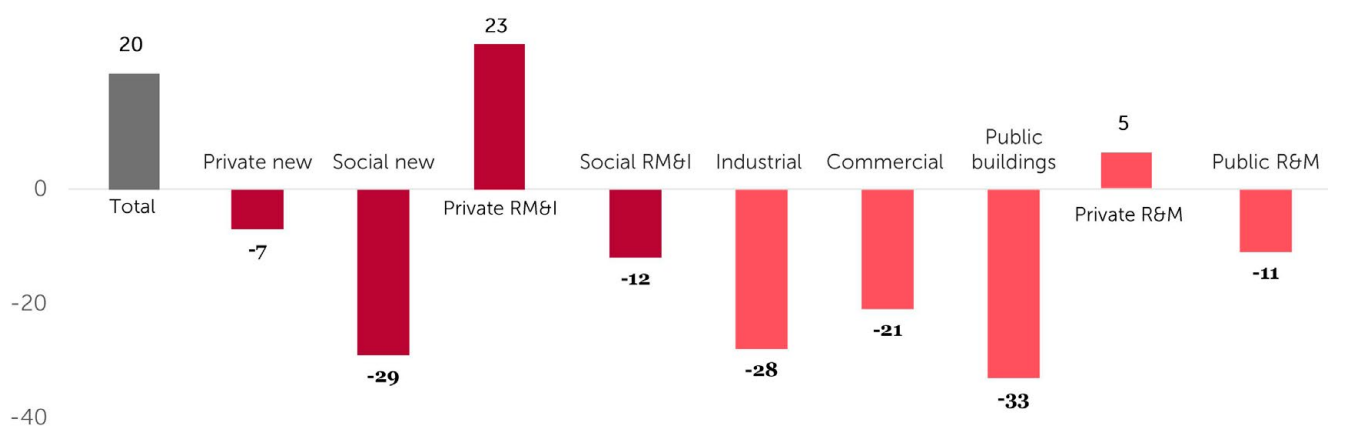
**One in two members is reporting a higher level of enquiries.**

<sup>1</sup> <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/employmentintheuk/september2020>

# Workload, expected workload and enquiries

## Workload

Workload by sector (Net balance)



**Graph 2** - Looking back, how does your company's workload in the period June – August 2020 compare to that in March – May 2020? Base: Private new (n=76); Social new (n=46); Private RM&I (n=134); Social RM&I (n=45); Industrial (n=51); Commercial (n=66); Public buildings (n=53); Private R&M (n=61); Public R&M (n=48). Excluding N/As

■ Residential  
■ Non-residential

**All sectors performed badly in June to August, except for Private RM&I which saw builders bounce back. The strong performance in this sector means the change in total workload sits at +20. Driven by the private sector, the proportion of members reporting an increased total workload rose from 11% to 47% in the second quarter of 2020.**

Most sectors, however, have continued to struggle. Private new build remained low at -7 (vs -26 in 2020 Q1), and social new build even more so (-29). This echoes the findings of the FMB House Builders' Survey 2020, which saw small to medium-sized (SME) house builders reporting buyer demand in England to be at its lowest levels in six years.<sup>2</sup> Economic uncertainty due to the coronavirus and Brexit has led house hunters to adopt a 'wait and see' approach. To note, it is too soon for the effects of the Stamp Duty holiday to have been reflected in this data.

Within the non-residential sector, the situation for those working on industrial and commercial buildings remained poor between June and August, with a change of -28 and -21 when compared to the previous three months.



**Smaller companies have whilst heeding the Governments advice got on with what they could. This resilience as always, been typical of the SME sector.**

FMB member, 11 August

<sup>2</sup> [https://www.fmb.org.uk/media/56838/fmb\\_house\\_builders\\_survey\\_2020\\_final.pdf](https://www.fmb.org.uk/media/56838/fmb_house_builders_survey_2020_final.pdf)

## Residential workload

**Activity in the residential sector saw a strong performance in Q2 2020, however this was solely driven by the private RM&I part of the market with homeowners looking to upgrade their homes post-lockdown.**

The change in total residential work rose by 67 percentage points to +19 (Table 1). This is driven almost exclusively by the private RM&I sector in which two in five (45%) FMB members report higher workloads over the past three months than in the period March to May. One in five (21%) reported lower workloads in this sector, demonstrating that the recovery is far from uniform.

Time spent indoors during the period March to May forced homeowners to consider how their homes functioned for them. Our members tell us many households are now looking to see how they can install a home office, or have more enhanced outside space to retreat to.



**We have seen an increased demand since lockdown has eased with people making lifestyle choices.**

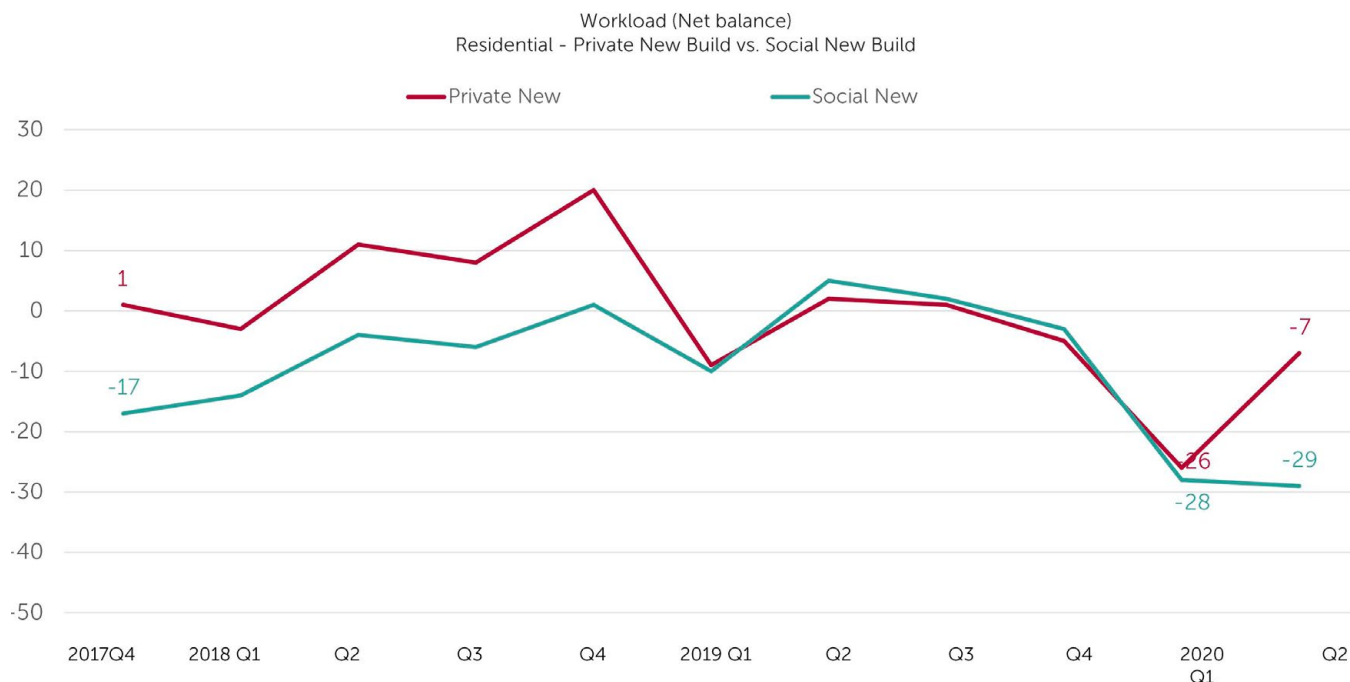
FMB member, 29 July

### Residential workload (net balance)

Workload	2018				2019				2020			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Private new	+1	-3	+11	+8	+20	-9	+2	+1	-5	-26	-7	
Private RM&I	+18	+8	+24	+17	+18	+2	-2	+1	+3	-46	+23	
Social new	-17	-14	-4	-6	+1	-10	+5	+2	-3	-28	-29	
Social RM&I	-15	+4	-1	-4	+9	-15	-2	+7	-1	-34	-12	
<b>Total Residential</b>	<b>+11</b>	<b>-1</b>	<b>+12</b>	<b>+5</b>	<b>+22</b>	<b>-9</b>	<b>+6</b>	<b>-1</b>	<b>+1</b>	<b>-48</b>	<b>+19</b>	

**Table 1** - Looking back, how does your company's workload in the period June – August 2020 compare to that in March – May 2020? Base: Total (n=166); Private new (n=76); Social new (n=46); Private RM&I (n=134); Social RM&I (n=45); Total residential (n=159) Excluding N/As

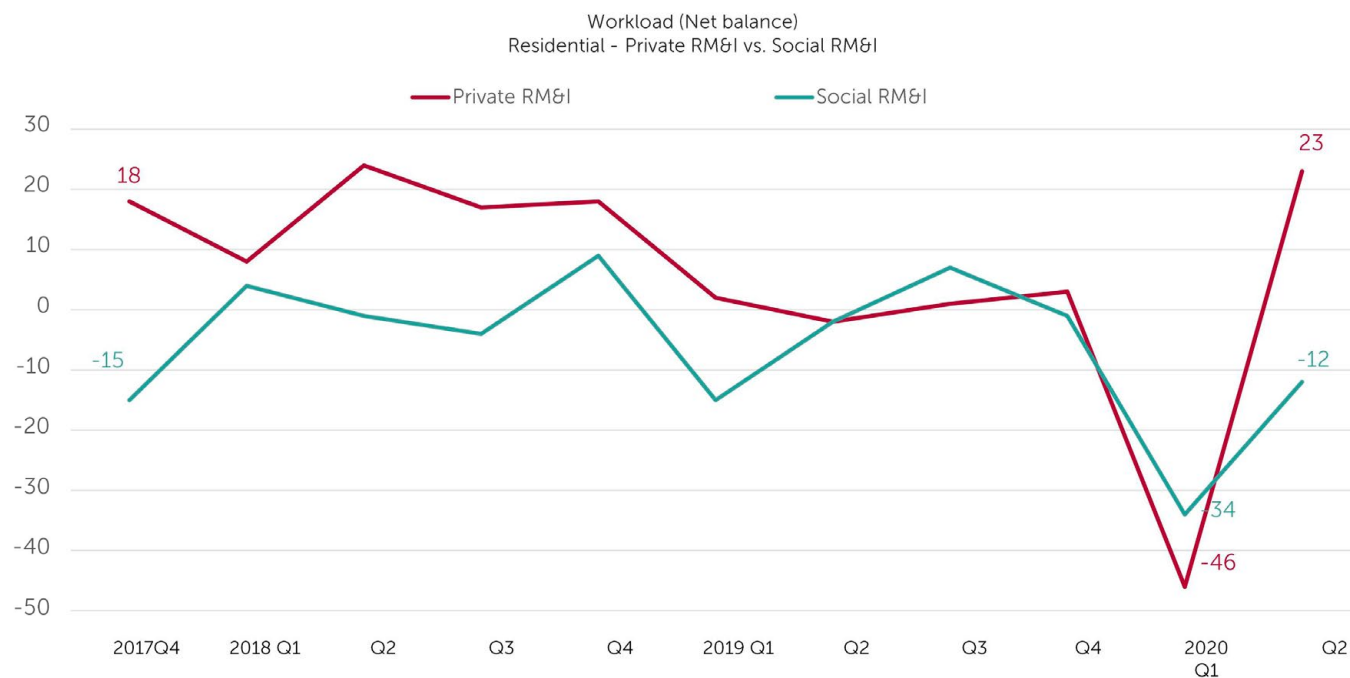
## Residential workload (continued)



**Graph 3** - Looking back, how does your company’s workload in the period June – August 2020 compare to that in March – May 2020? Private new (n=76); Social new (n=46); Private RM&I (n=134); Social RM&I (n=45) Excluding N/As

By contrast, workload in the social new build sector has remained low over the past three months, with 41% reporting lower workloads than the three months previous. A notable rise occurred in the social RM&I sector, but with 31% reporting a decrease and only 19% seeing an increase, this remains negative at -12.

We know local authorities have been spending considerable resources on managing local lockdowns and supporting vulnerable people. This may be having an impact on workloads in this sector as fewer resources are available.



**Graph 4** - Looking back, how does your company’s workload in the period June – August 2020 compare to that in March – May 2020? Private new (n=76); Social new (n=46); Private RM&I (n=134); Social RM&I (n=45) Excluding N/As



## Non-residential Workload

### Non-residential workload (net balance)

Workload	2018					2019				2020	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Public buildings	-7	-5	+1	+8	+2	-23	-10	-8	+2	-35	-33
Industrial	+7	0	+3	+11	0	-27	-10	-8	-6	-36	-28
Commercial	+19	+6	+3	+15	+16	-27	-6	-10	+5	-36	-21
Public R&M	-3	-3	-2	-7	-7	-27	-14	-2	+5	-35	-11
Private R&M	+6	+2	+7	+5	+10	-8	-20	-8	-5	-45	+5
<b>Total Non-Residential</b>	<b>+16</b>	<b>-2</b>	<b>+9</b>	<b>+22</b>	<b>+10</b>	<b>-22</b>	<b>-3</b>	<b>-4</b>	<b>+7</b>	<b>-43</b>	<b>-15</b>

**Table 2** - Looking back, how does your company's workload in the period June – August 2020 compare to that in March – May 2020? Base: Industrial (n=51); Commercial (n=66); Public buildings (n=53); Public R&M (n=48); Private R&M (n=61); total non-residential building work (n=76) Excluding N/As

**Two in five (40%) of those who work on public buildings say the workload has decreased in the period June to August compared to between March and May. Just 7% say it has increased, making this the worst performing sector.**

Similarly, in the industrial sector, two in five (39%) reported a decrease in workload compared to the previous three months and 11% reported an increase.

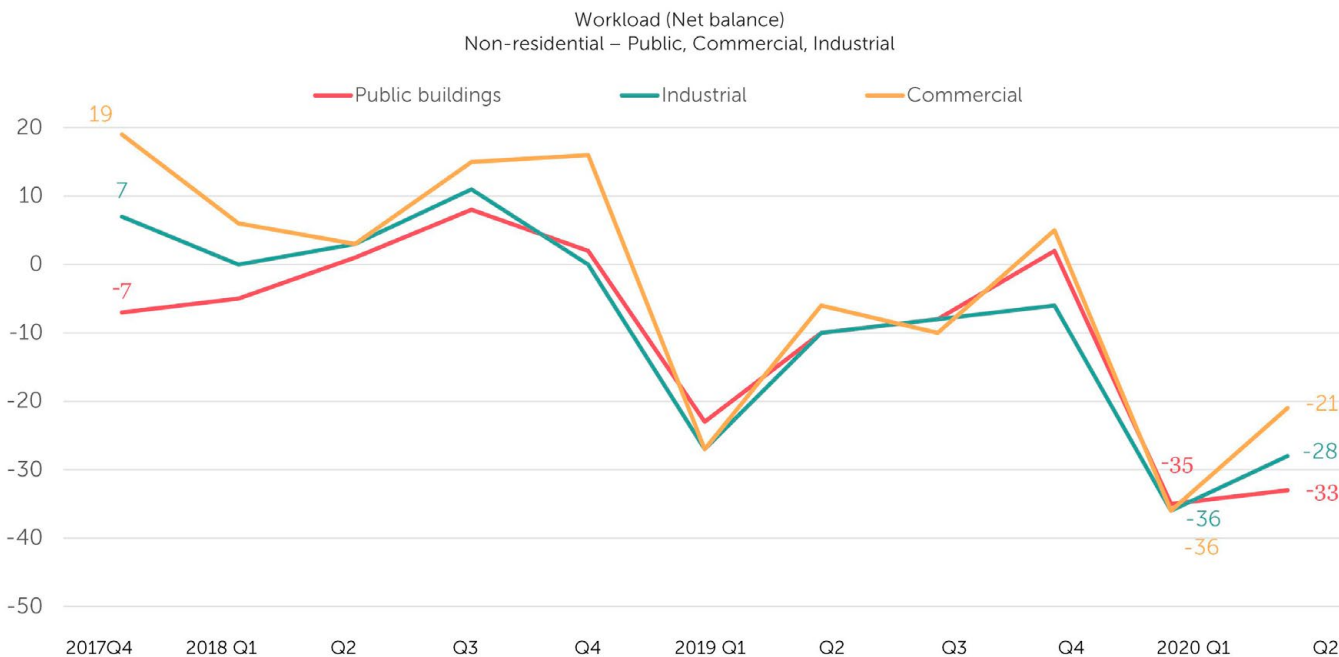
In Wales, as part of the recently established Welsh Construction Forum, the FMB collaborated with Welsh Government and other industry stakeholders to produce a 6 to 12 month programme of public sector construction work. Bringing this pipeline of work into one easily accessible place will help instil confidence within the industry to invest and encourage future investment.<sup>3</sup>



**The non-residential sectors are showing fewer signs of stabilizing.**

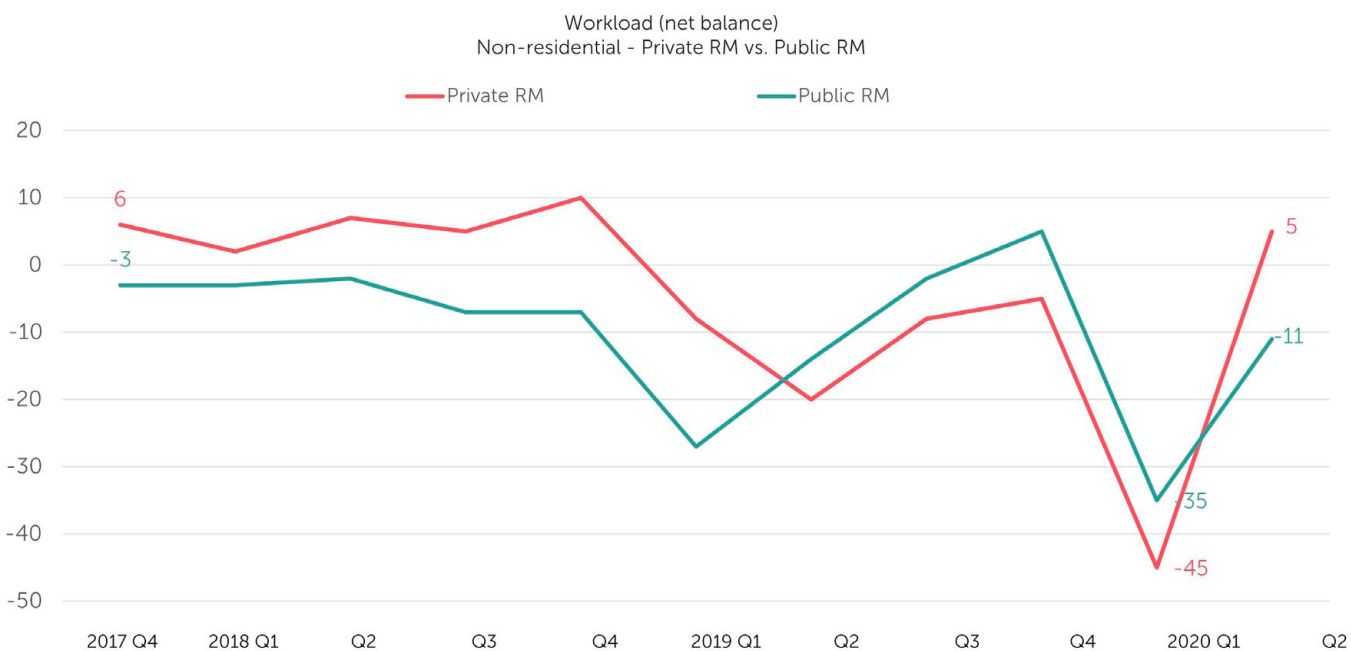
<sup>3</sup> [https://businesswales.gov.wales/sites/business-wales/files/Pipeline%20of%20Welsh%20Public%20sector%20works%202020\\_21%20FV.pdf](https://businesswales.gov.wales/sites/business-wales/files/Pipeline%20of%20Welsh%20Public%20sector%20works%202020_21%20FV.pdf)

## Non-residential workload (continued)



**Graph 5** - Looking back, how does your company’s workload in the period June – August 2020 compare to that in March – May 2020? Base: Private new (n=76); Social new (n=46); Private RM&I (n=134); Social RM&I (n=45) Excluding N/As

The most notable increase across non-residential work was in the Private R&M sector, which rose by 50 percentage points compared to the previous quarter (Graph 6). This illustrates there has been a strong performance in private repair and maintenance in both residential and non-residential sectors.



**Graph 6** - Looking back, how does your company’s workload in the period June – August 2020 compare to that in March – May 2020? Base: Private new (n=76); Social new (n=46); Private RM&I (n=134); Social RM&I (n=45) Excluding N/As

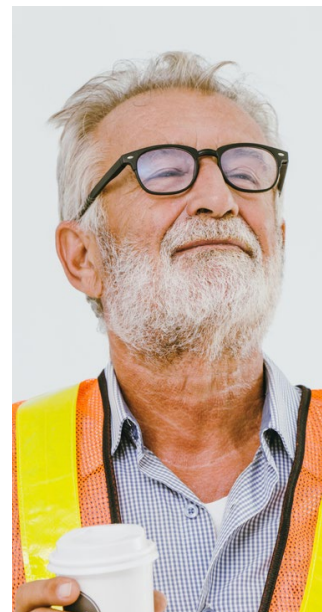
## Expected workload

**Looking forward there is cautious optimism, as four in ten (42%) respondents expect a higher level of workload over the next two months, and two in ten (19%) forecast a lower level of workload (Graph 7). This is largely driven by the private RM&I sector and results in a net change for total expected workload of +23.**

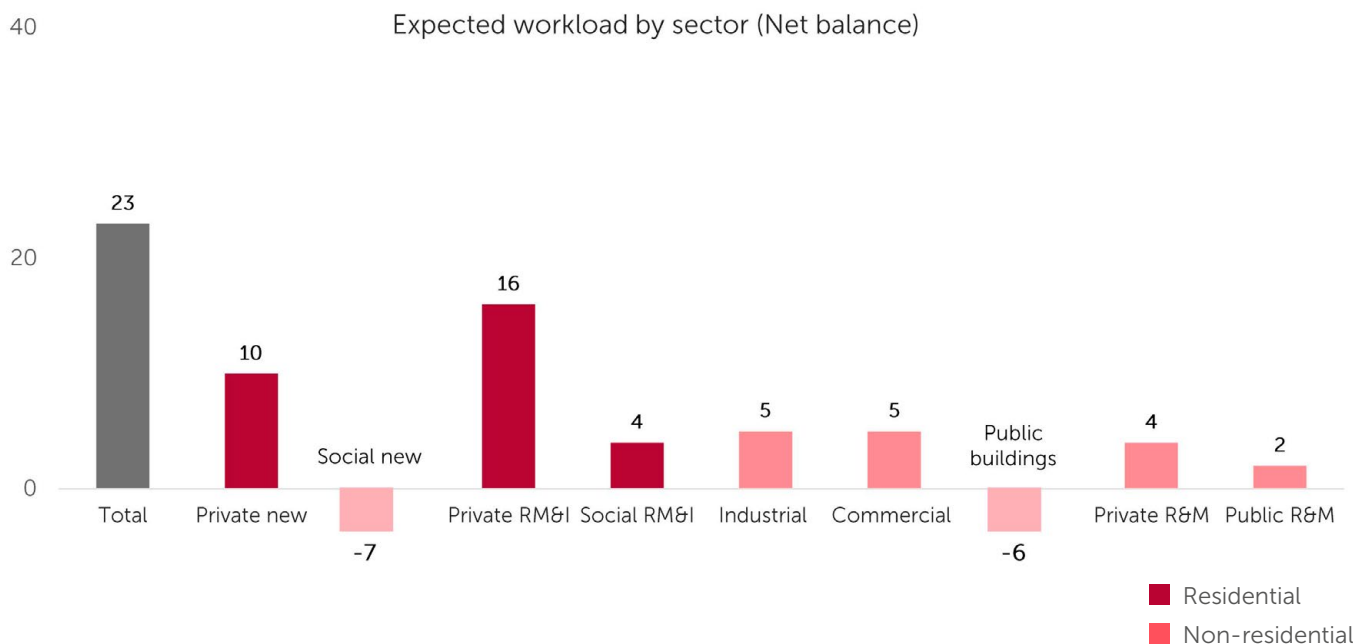
While the majority of sectors are seeing a change in positive territory for the period September to October, most respondents are not expecting improved workloads. While this suggests there will not be a significant boost in the short term, stabilizing workloads are welcome as the industry has been working together to avoid a repeat of the 2008 economic crash when hundreds of thousands of people left the sector.

The FMB has been working collaboratively under the umbrella of the Construction Leadership Council to devise an Industry Recovery Plan that supports the industry in the short, medium and long-term.<sup>4</sup>

For house builders in the private new build sector in England, these cautious forecasts echo the findings of the FMB House Builders' Survey 2020 which saw 35% of respondents predict that they will regain pre-coronavirus activity levels sometime in 2021, and 10% said they will do so by the end of 2022.<sup>5</sup>



**Looks like business is starting to pick up.**  
FMB member, 28 May



**Graph 7** - Looking forward, how do you expect your company's workload in the period September - October 2020 to compare with that in June - August 2020? Base: Private new (n=80); Social new (n=50); Private RM&I (133); Social RM&I (n=53); Industrial (n=58); Commercial (n=68); Public buildings (n=57); Private R&M (71); Public R&M (n=52) Excluding N/As

<sup>4</sup> <https://www.constructionleadershipcouncil.co.uk/news/construction-roadmap-to-recovery-plan-published/>

<sup>5</sup> [https://www.fmb.org.uk/media/56838/fmb\\_house\\_builders\\_survey\\_2020\\_final.pdf](https://www.fmb.org.uk/media/56838/fmb_house_builders_survey_2020_final.pdf)

## Expected workload (continued)

Builders in the private sector are generally more optimistic about future workloads than those in the public sector (Tables 3 and 4).

The change for total residential workload is +18. Three in ten (31%) builders in the private RM&I sector are expecting a higher workload than in the previous three months. Conversely, three quarters (76%) of those working in the social RM&I industry are anticipating no change in workload over the period September to October.

Increased activity in the private RM&I sector could point to anticipation of the implementation of the Green Homes Grant Scheme, which aims to fund energy efficiency improvements for households in England between September and March.

Within each of the non-residential sectors, a majority are anticipating no change.



### Expected workload (net balance)

Residential	2018					2019				2020	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Private new	-3	+28	+20	+10	+4	+11	+18	+17	+7	-20	+10
Private RM&I	+12	+31	+36	+18	0	+23	+10	+14	+13	-13	+16
Social new	-3	+5	+8	-2	+6	+8	+6	+3	-6	-26	-7
Social RM&I	-2	+14	+4	+4	-1	+4	+8	+8	+7	-32	+4
<b>Total Residential</b>	<b>+12</b>	<b>+28</b>	<b>+20</b>	<b>+11</b>	<b>+12</b>	<b>+11</b>	<b>+18</b>	<b>+5</b>	<b>+10</b>	<b>-19</b>	<b>+18</b>

### Non-residential

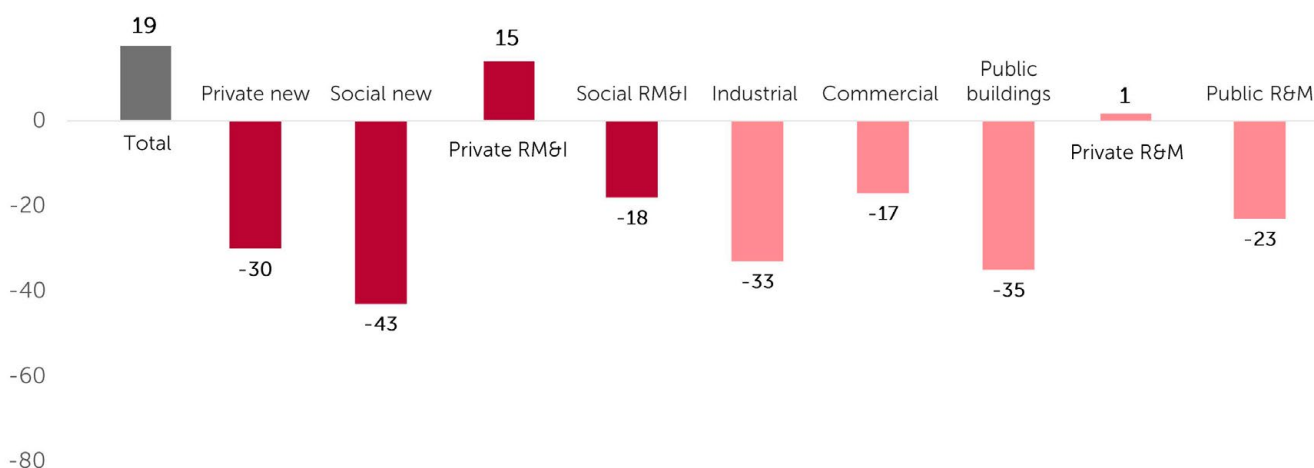
Public buildings	+2	+9	+8	-10	-13	+3	+2	-19	+12	-26	-6
Industrial	+7	+15	-3	+5	+11	-13	0	-10	+7	-33	+5
Commercial	+13	+32	+11	+2	+10	+4	+9	0	+20	-32	+5
Public R&M	+3	+5	+8	-9	-6	-3	-2	-5	+10	-32	+4
Private R&M	+3	+16	+15	+6	+2	+11	+3	-2	+17	-13	+2
<b>Total Non-Residential</b>	<b>+10</b>	<b>+19</b>	<b>+12</b>	<b>0</b>	<b>+12</b>	<b>-7</b>	<b>+6</b>	<b>-4</b>	<b>+7</b>	<b>-29</b>	<b>+4</b>

**Tables 3 and 4** - Looking forward, how do you expect your company's workload in the period September - October 2020 to compare with that in June - August 2020? Base: Private new (n=80); Social new (n=50); Private RM&I (133); Social RM&I (n=53); Total residential (n=160); Industrial (n=58); Commercial (n=68); Public buildings (n=57); Private R&M (71); Public R&M (n=52); Total non-residential (n=82). Excluding N/As

# Enquiries



Enquiries by sector (Net balance)



**Graph 8** - Looking back, how has the level of enquiries regarding future work changed in the period June - August 2020 compared to March - May 2020? Total (n=166); Base: Private new (n=91); Social new (n=54); Private RM&I (n=134); Social RM&I (n=53); Industrial (n=61); Commercial (n=74); Public buildings (n=51); Private R&M (76); Public R&M (n=51) Excluding N/As

■ Residential  
■ Non-residential

**Respondents from most sectors say that the total level of enquiries they received was lower over the second part of 2020 than in the previous quarter. However, a stronger performance in the Private R&M sector has resulted in a net change of +19 compared to the previous quarter.**

As with total workload, the level of enquiries across the industry varies

greatly depending on the sector. The change for enquiries among those working on residential new builds is firmly in the negative territory at -43 for social new and -30 for private new (Graph 8). These responses are unexpected, given the Stamp Duty Land Tax holiday announced in July. They do however point to ongoing economic uncertainty linked to the coronavirus and the unknown potential impact of Brexit in the new year.



## Enquiries

### Enquiries (net balance)

Residential	2018				2019				2020			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	
Private new	+4	+18	+24	+12	+7	-3	+6	-3	-3	-54	-30	
Private RM&I	+8	+18	+25	+20	+7	+11	+12	+9	+6	-61	+15	
Social new	-17	+13	-2	+6	+12	-3	-1	-16	-11	-44	-43	
Social RM&I	-9	+5	-1	+2	+8	+5	0	-6	+6	-50	-18	
Total Residential	+10	+15	+16	+17	+12	-2	+9	-5	0	-62	+14	

### Non-residential

Public buildings	-3	+7	+2	+3	-9	-18	-1	0	-5	-48	-35
Industrial	+4	+6	0	+7	-1	-13	-12	-8	+2	-53	-33
Commercial	+15	+12	+15	+6	+9	-7	-3	+3	+3	-56	-17
Public R&M	-3	+6	+1	+4	0	-8	-11	-2	+4	-51	-23
Private R&M	+4	+10	+9	+1	+7	+9	-5	+2	+6	-60	+1
Total Non-Residential	+14	+3	0	+13	+5	-5	-5	-1	-1	-58	-13

**Tables 5 and 6** - 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 (n=91); Social new (n=54); Private RM&I (n=134); Social RM&I (n=53); Total residential (160); Industrial (n=61); Commercial (n=74); Public buildings (n=51); Private R&M (76); Public R&M (n=51); Total non-residential (n=86). Excluding N/As



# Output

**The coronavirus crisis is still having a significant impact on SME businesses in the construction industry. Three quarters of FMB members (74%) say that the coronavirus is constraining their firm's current output, and a similar proportion (70%) expect this to be the case over the next 12 months (Graph 9).**

Four in ten (59%) say that material/equipment shortages are constraining output, and a similar percentage believe they will continue to do so over the next 12 months.

Looking ahead, the industry is considering what impact Brexit will have on the supply of materials. This is because many important building

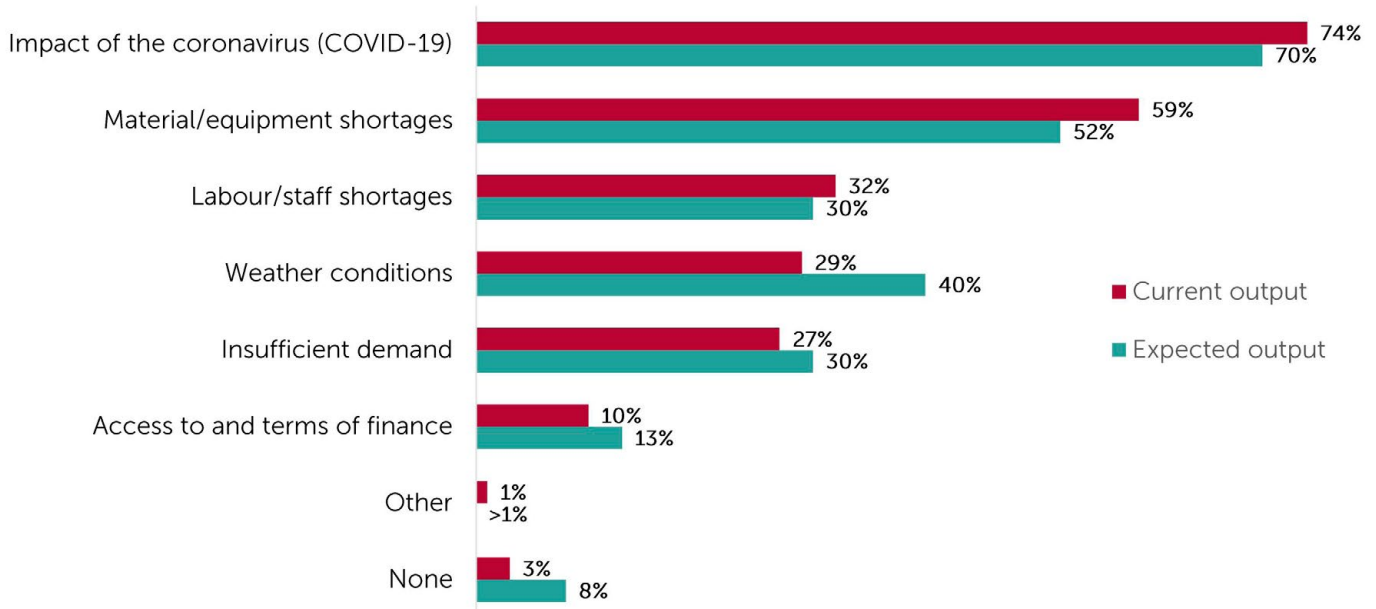
products, like timber, are imported from the EU. The FMB is working with manufacturers and merchants to share forecasts of demand and ensure that the supply chain is in step.

As in Q1 2020, one third of FMB members (32%) say that their company's output is being constrained by insufficient demand. A similar proportion (29%) say that their current output is being constrained by the weather conditions. This figure rises to 40% when looking forward to the next 12 months, as we approach the autumn and winter period. This raises concerns over the impact adverse weather will have on the implementation of the Green Homes Grant Scheme and other stimulus implemented over the winter.

**The inbound material supply chain has been totally disrupted [...] It's an incredibly frustrating time.**

FMB member, 14 July

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



**Graph 9** - 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=166)

# Prices & costs

## Actual prices & costs

**Costs for builders and the prices of their jobs have stabilised in Q2 2020, while the cost of materials has remained consistently high (Graph 10).**

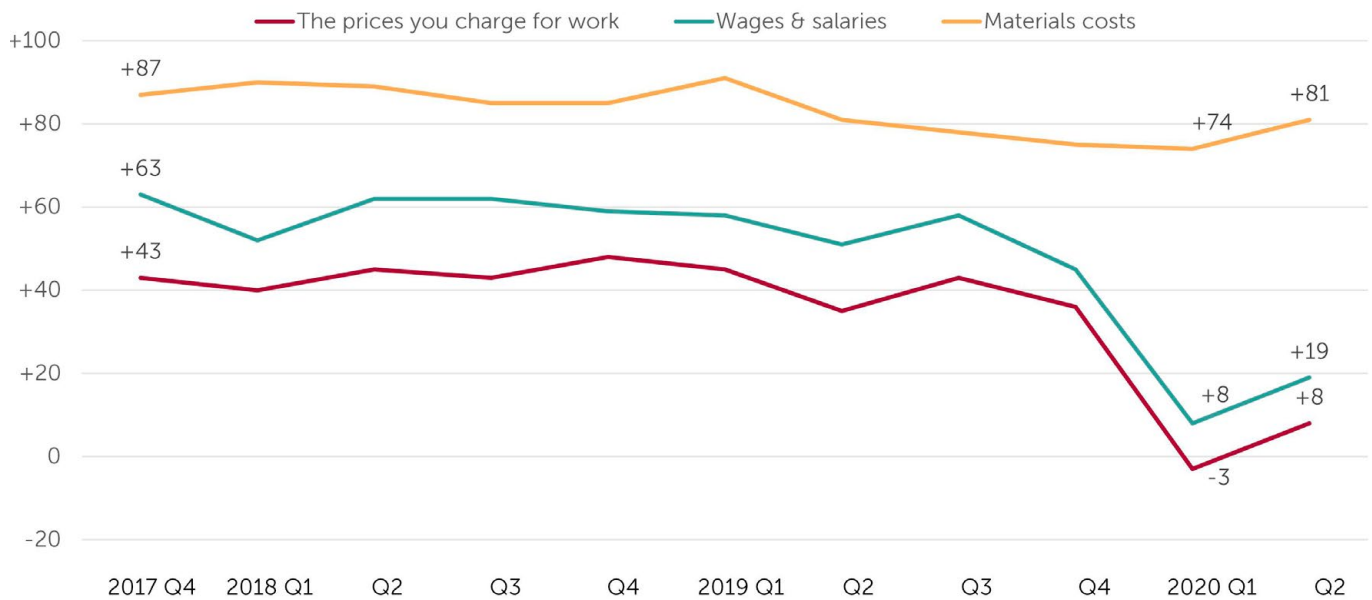
The proportion who say that output prices increased over the period June to August 2020 rose from 12% to 25% in Q2 2020 and the proportion reporting no change was 57%.

Four fifths of FMB members (82%) report that materials costs increased, while just 2% say that costs decreased. Material costs are an ongoing challenge for the building industry.



**Due to distancing and shortages in the industry, extra resources are required to function 'normally' which increases overheads.**  
FMB member, 29 June

Actual prices & costs (Net balance)



**Graph 10** - How have both the prices that you charge for work, and your outgoing costs changed over the period of June - August 2020? Base: The prices you charge for work (n=164); Wages & salaries (n=164); Materials costs (n=165) Excluding N/As



## Expected prices & costs

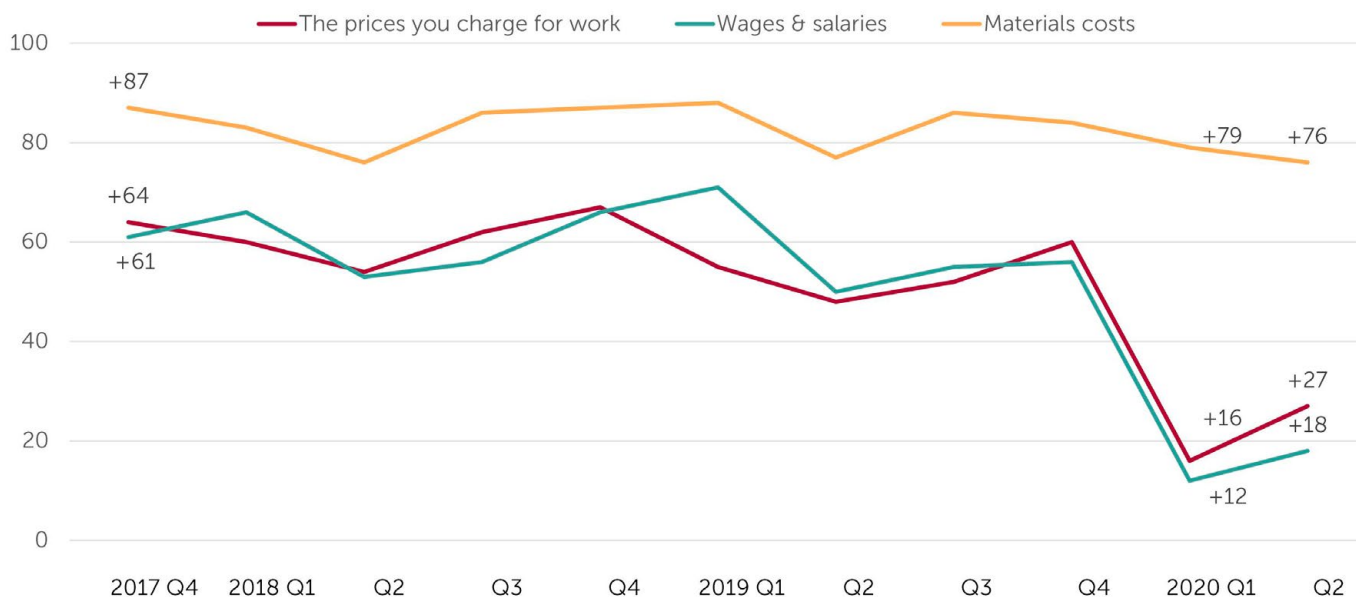
**FMB members' expectations for September to October follow a similar pattern to current prices and costs. The proportion who expect output prices to decrease is down from 18% to just 10% since Q1 2020. A notable majority (69%) expect the price of wages to be unchanged in the period September to October (Graph 11).**

Four in five FMB members (78%) say that they expect materials costs to increase over the next two months, while 2% expect them to decrease, resulting in a net balance of +76, in line with the previous wave.



**Potential stock issues in the coming months is a worry.**  
FMB member, 3 July

Expected prices & Costs (Net balance)



**Graph 11** - And how do you expect both the prices that you charge for work, and your outgoing costs to change over the period of September - October 2020? Base: The prices you charge for work (n=165); Wages & salaries (n=162); Materials costs (n=165) Excluding N/As

# Employment and labour

**FMB members report that employment in the period June to August has remained broadly the same as the preceding three-month period (Graph 12), with four in five (78%) reporting no change.<sup>6</sup> Just 7% say that the number of builders within their firm increased in the last three months, while 16% say that the number of specialists decreased. Employment in the industry is therefore showing signs of stabilising.**

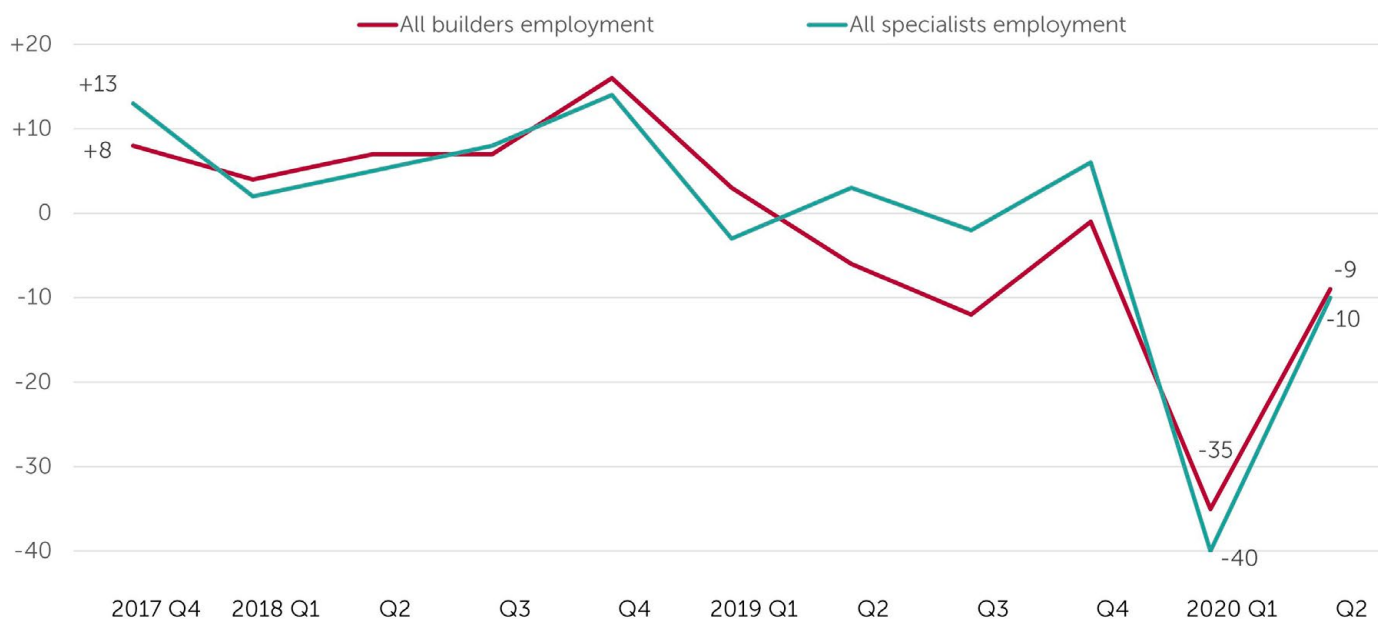
Seven in ten (70%) respondents reported no change from the previous three months with regards to the number of specialists in the firm. Contrastingly, one in five respondents (17%) expect

the number of builders within their workforce to increase over the next two months, whereas just 5% expect this to decrease. One in five (16%) is planning to increase the number of specialist tradespeople on site in the months ahead.

That one in five employers is looking to grow the number of builders on site is reassuring, and points to capacity in the industry to absorb new recruits. Indeed, we know that one in three FMB house builder members in England plan to increase their headcount on site over the year ahead.<sup>7</sup> Data from the ONS also shows that construction saw an increase of 4,000 in vacancies in the period April to June 2020.<sup>8</sup>

**Employment levels of builders and specialists have stabilised in the summer months.**

Current employment (Net balance)



**Graph 12** - How has the number of employees within your company's workforce changed during June - August 2020, when compared with March - May 2020? Base: Builders (n=161); Specialists (n=155) Excluding N/As



<sup>6</sup> 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).

<sup>7</sup> [https://www.fmb.org.uk/media/56838/fmb\\_house\\_builders\\_survey\\_2020\\_final.pdf](https://www.fmb.org.uk/media/56838/fmb_house_builders_survey_2020_final.pdf)

<sup>8</sup> <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/employmentintheuk/september2020>

# Employment and labour (continued)

With the expected change in employment for both builders and specialists above zero, and expected workload increasing across the sectors, this suggests FMB members are, on balance, cautiously optimistic about their prospects over coming months.

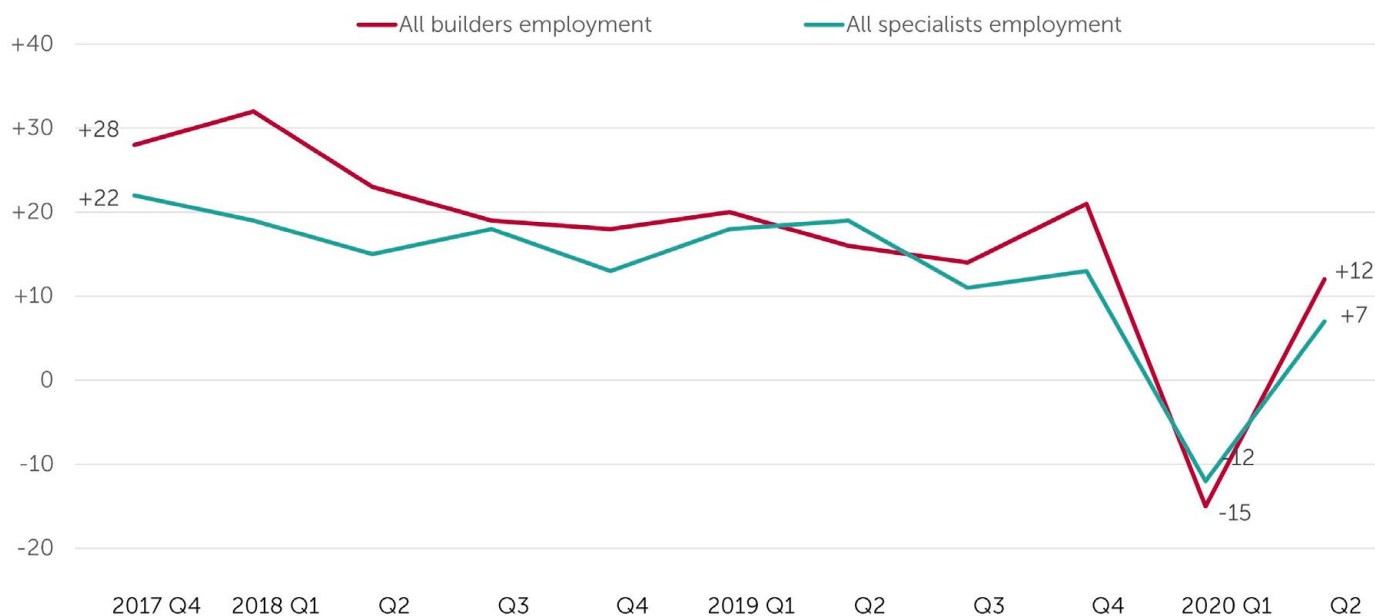
FMB members are slightly more likely to report difficulty in recruiting skilled staff across all occupations than in Q1 2020 (Graph 14), bearing in mind a sharp decrease in the first part of the year. This could reflect the stabilisation in current

and expected workload across some sectors.

The Chancellor of the Exchequer announced funding in July to launch the Talent Retention Scheme for construction, an online portal that supports the redeployment of staff at risk of redundancy across the sector. The Chancellor announced additional measures to encourage training, including £2,000 grant for SMEs training apprentices. The FMB welcomed these measures to support builders to train.

**A £2,000 grant for training an apprentice will go towards the typical costs of training that apprentice and reward our contribution.**  
FMB member, 8 July

Expected employment (Net balance)



**Graph 13** - How do you expect the number of employees within your company's workforce to change over the period of September - October 2020? Base: Builders (n=158); Specialists (n=156) Excluding N/As



# Employment and labour (continued)

Carpenters and joiners are the most difficult trades for firms to recruit for, with 34% saying that they were struggling to recruit into these roles. These are the most notable increases from Q1 2020.

The report also finds that one in three employers (30%) is struggling to hire general labourers and plasterers. 27% are also struggling to hire bricklayers.

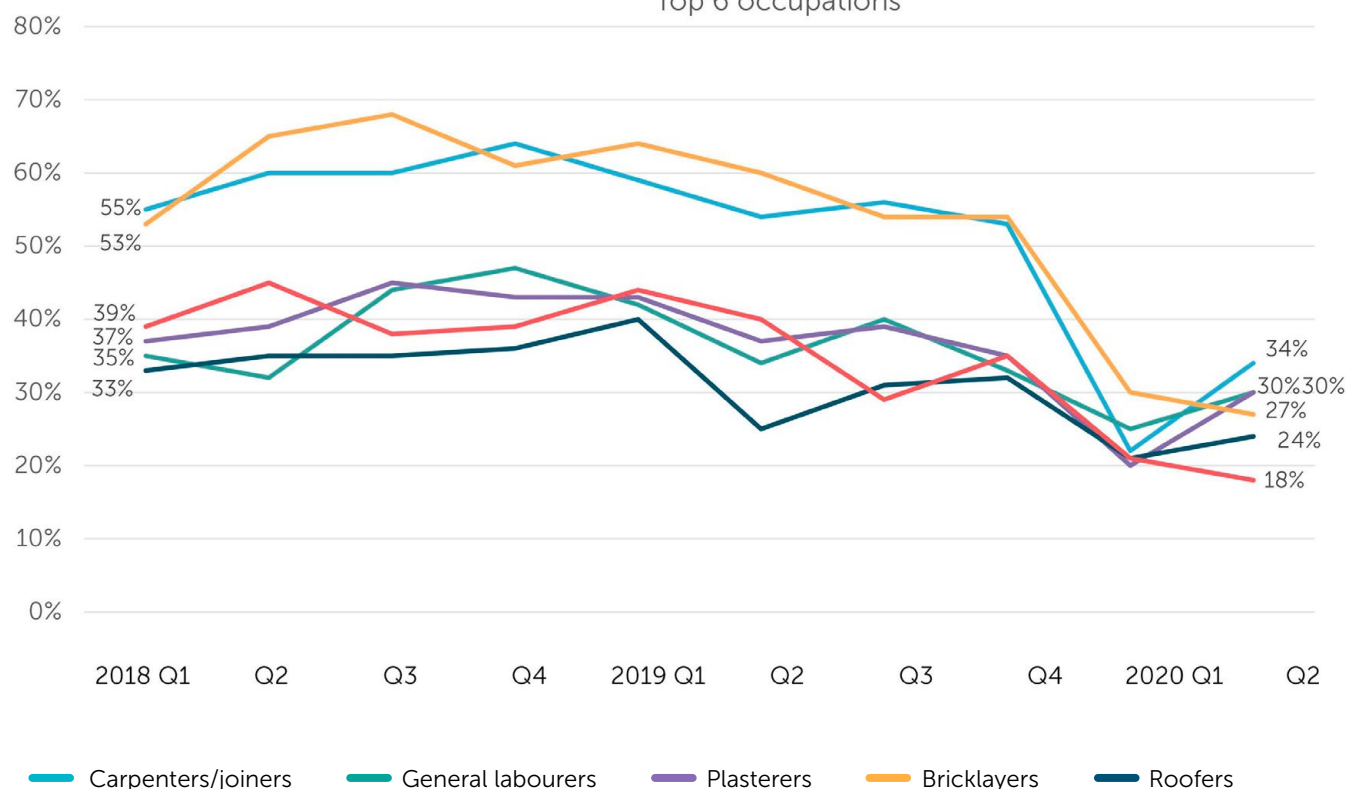
The reported easing of skills shortages is also echoed in the FMB's House Builders' Survey which saw 'a shortage of skills workers' plummet down the list of concerns for builders in England, with just 23% of respondents citing this issue.<sup>9</sup>

However, the relative easing of skills shortages should be considered within the context of lower levels of activity in the industry, and there is a risk that a lack of demand for skills is masking an ongoing systemic shortage of construction trades.

Members report that bricklaying on scaffolds, fixing plaster boards and working in small houses all represent some of the more difficult jobs to complete within social distancing guidelines. The lower levels of employment in these trades could relate to the difficulties in conducting these works safely.



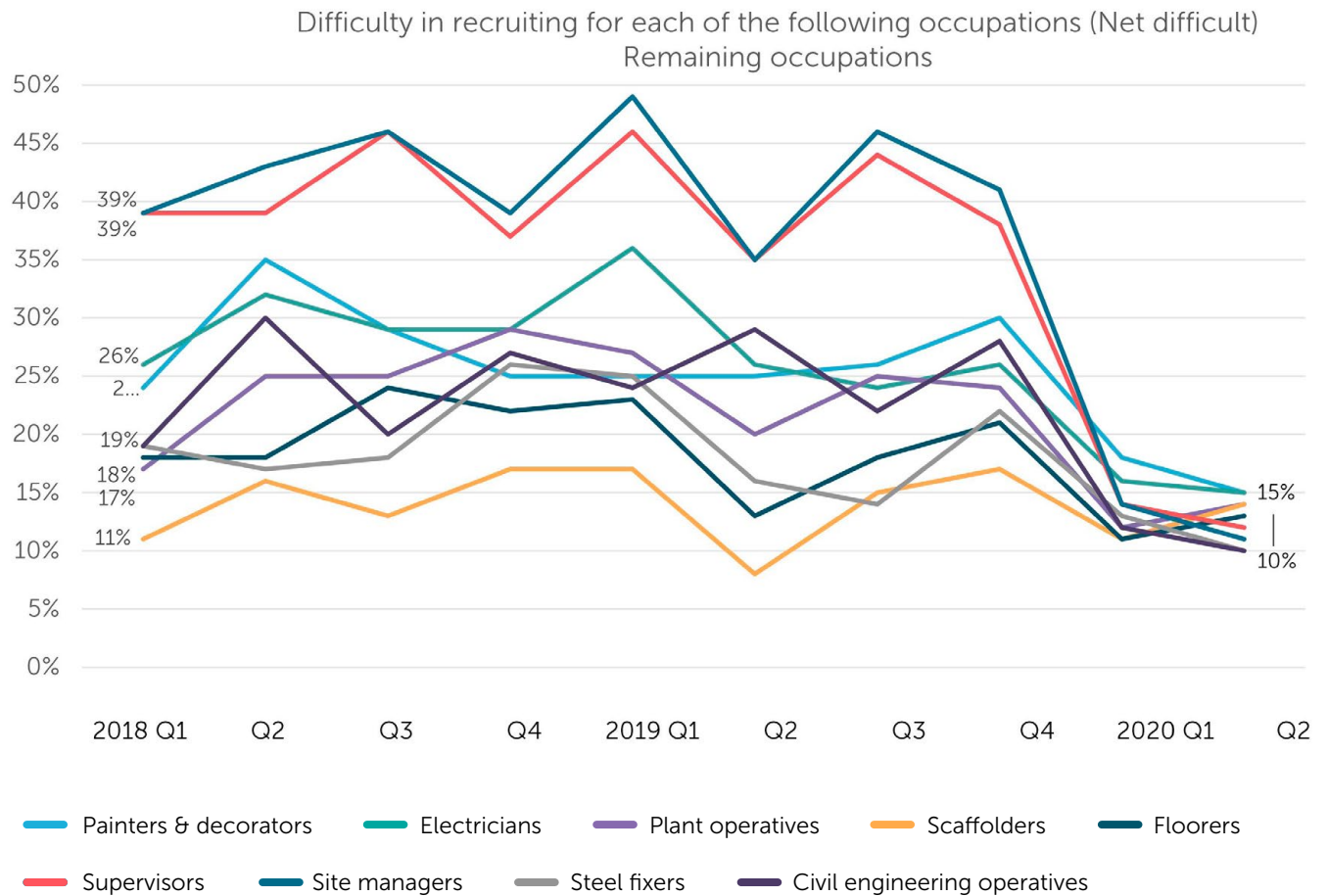
Difficulty in recruiting for each of the following occupations (Net difficult)  
Top 6 occupations



**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 June - August 2020? Base: Total (n=166)

<sup>9</sup> [https://www.fmb.org.uk/media/56838/fmb\\_house\\_builders\\_survey\\_2020\\_final.pdf](https://www.fmb.org.uk/media/56838/fmb_house_builders_survey_2020_final.pdf)

# 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 June - August 2020? Base: Total (n=166)

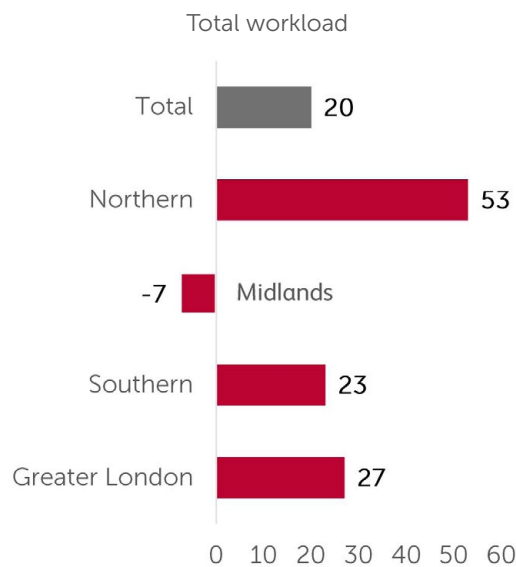


# Regional and national perspectives

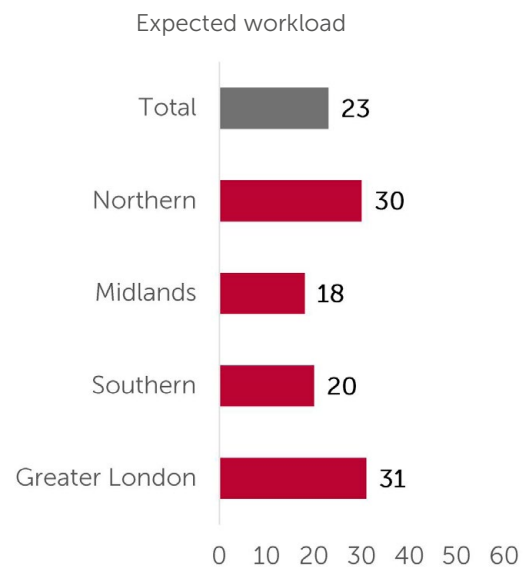
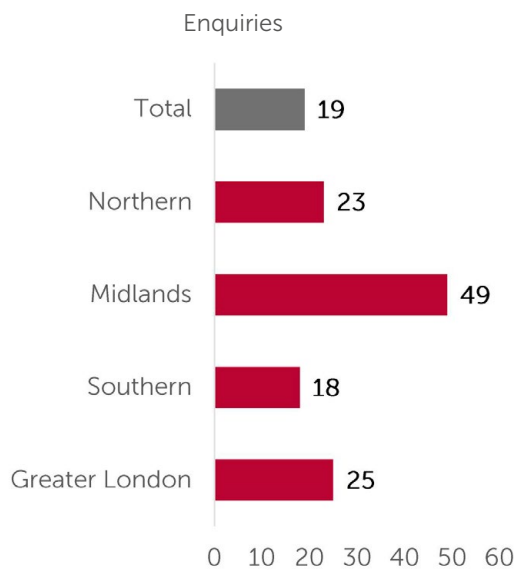
## English regions

The change for most English regions is positive (Graphs 16 to 18). Those working in the North of England are more likely to report an increase in levels of workload compared to the period March to May 2020 (+53). Greater London and the North report the highest net increase for expected workload (+31 and +30), and enquiries regarding future work is most likely to have increased in the Midlands (+49) compared to all other regions.

### Regional perspective (Net balance by region)



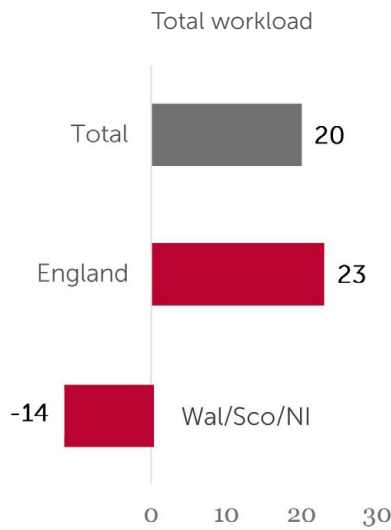
**Graphs 16 – 18** - Q3/ Q4/ Q6. Base: Northern (n=31); Midlands (n=34); Southern (n=79); Greater London\* (n=24) \*Caution: Low base size



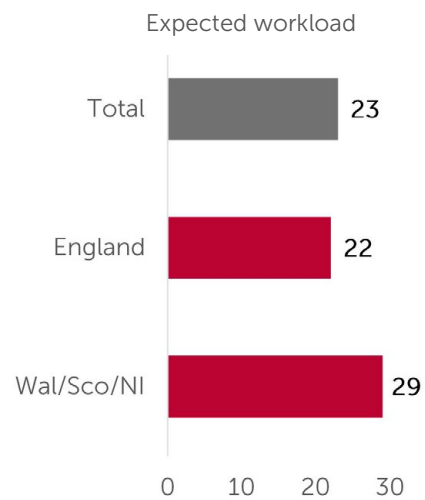
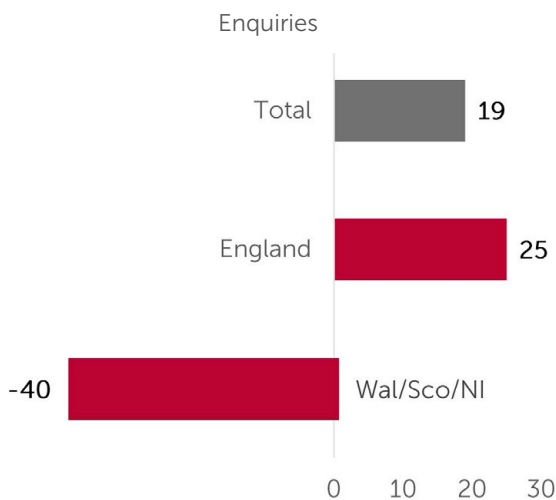
## National perspectives

Total workload stayed in negative territory for builders in Scotland, Wales and Northern Ireland. Expectations for future workloads are not optimistic, with respondents noting low levels of enquiries. Expected workload for the period September to October is relatively strong. Due to limited base sizes in the devolved nations, these results can only be treated as indicative.

### National perspective (Net balance by nation)



**Graphs 19 – 21** - Q3/ Q4/ Q6. Base: England (n=144); Wal/Sco/NI\* (n=22) \*Caution: Low base size



# Appendix

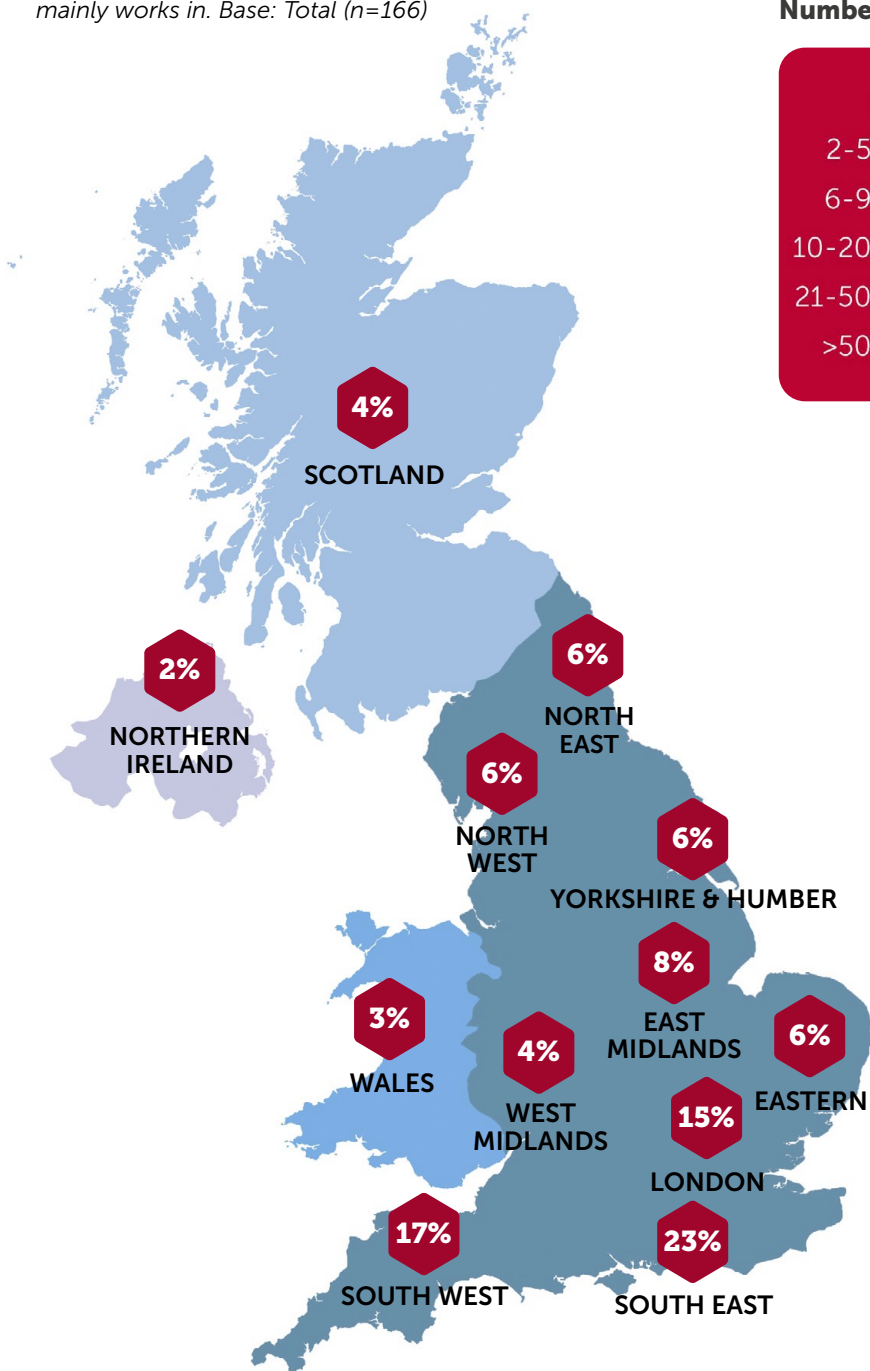
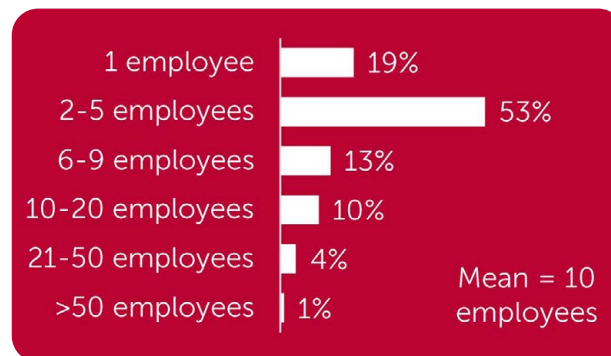
## Respondent profile

**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=166)

### Sectors worked in (mean % for each sector)



### Number of employees



**NET: Northern - 18%**  
**NET: Midlands - 17%**  
**NET: Southern - 56%**  
**NET: Wal/Sco/NI - 9%**





## 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 11 August and 7 September 2020 and received 166 responses. It was published in October 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](http://www.fmb.org.uk).  
For more information about the FMB State of Trade Survey please email [publicaffairs@fmb.org.uk](mailto:publicaffairs@fmb.org.uk).

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