

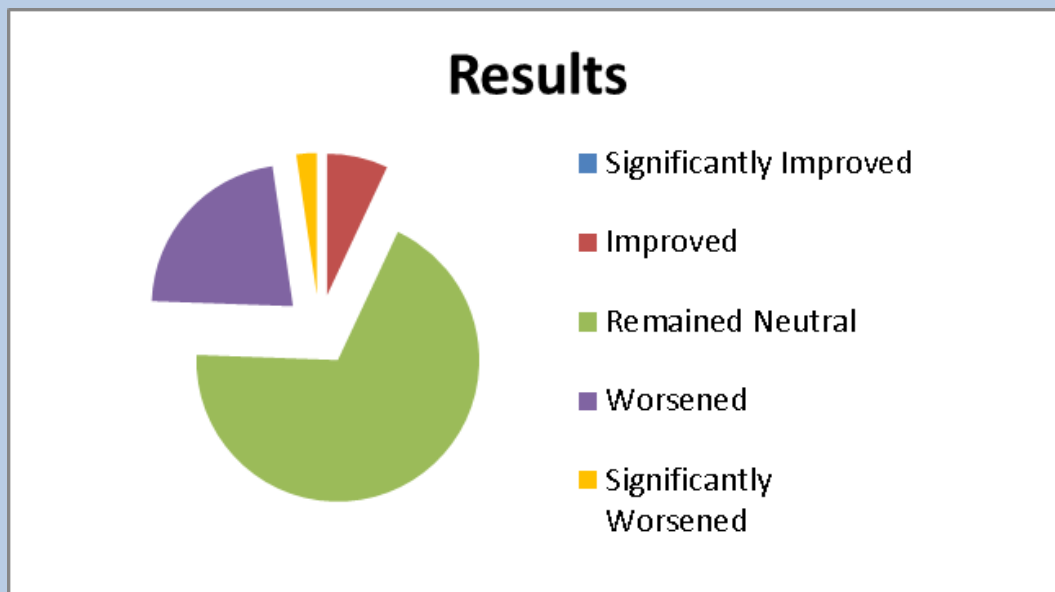
Brexit Survey Results

Presented by Jon Williams – Southern Construction
Framework South West Regional Manager

Compiled By Gabby Stevens, Apprentice for Southern
Construction Framework



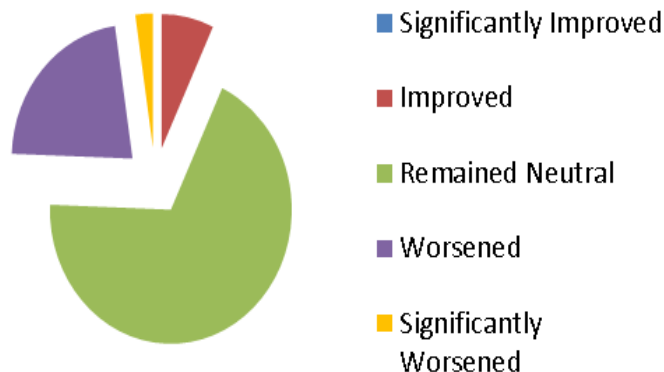
Question 1	In your opinion has construction market confidence changed since pre Brexit?		
		Results from 86 surveys	Percent from 86%
	Significantly Improved	1	1.20%
	Improved	6	6.90%
	Remained Neutral	58	67.50%
	Worsened	19	22.10%
	Significantly Worsened	2	2.30%



Question 1 Comparison: In your opinion has construction market confidence changed since pre Brexit?

	<u>All Regions</u>	<u>Mid Region</u>
	Results from 86 surveys from all regions	Results from 13 surveys from mid region
Significantly Improved	1	0
Improved	6	0
Remained Neutral	58	12
Worsened	19	1
Significantly Worsened	2	0

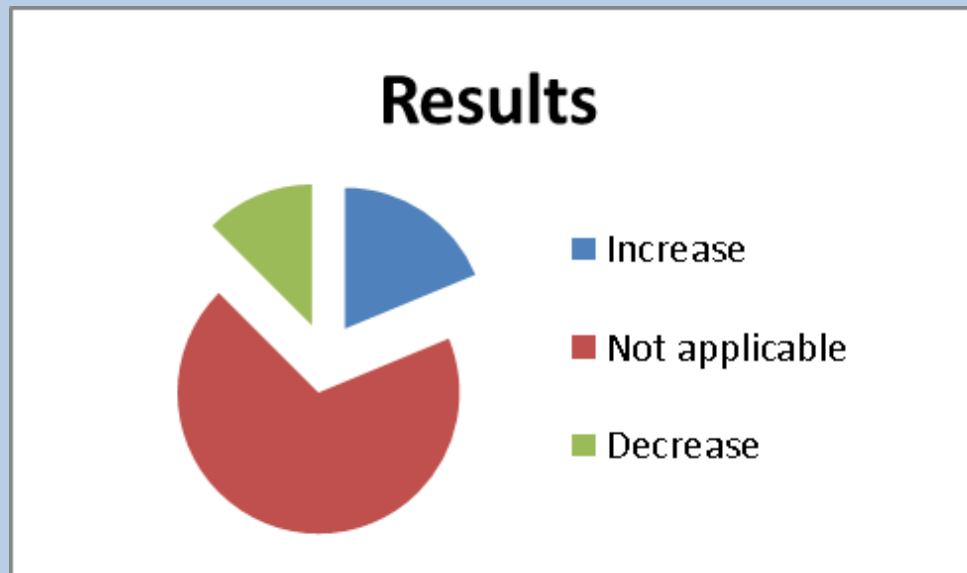
All Regions



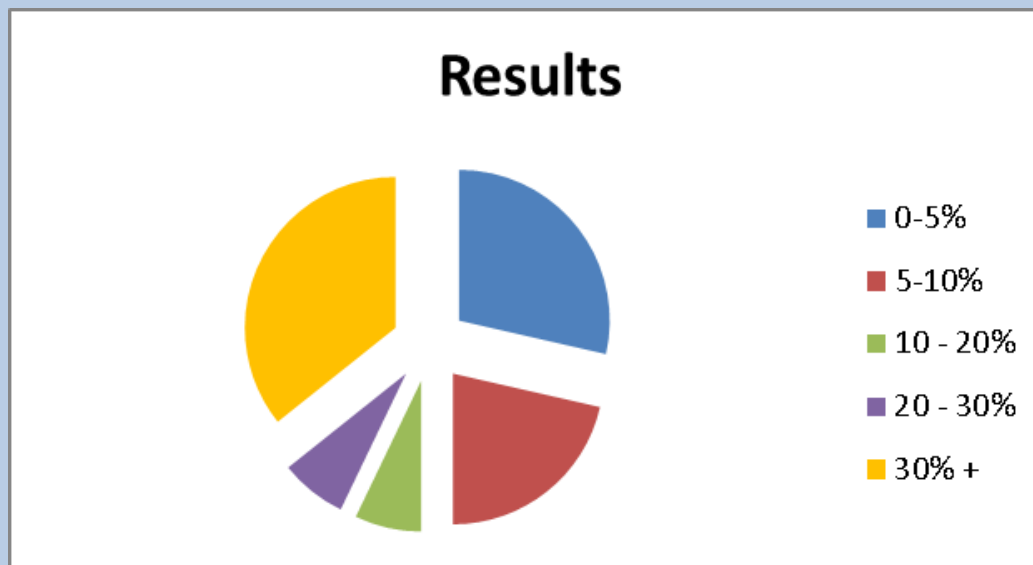
Mid Region



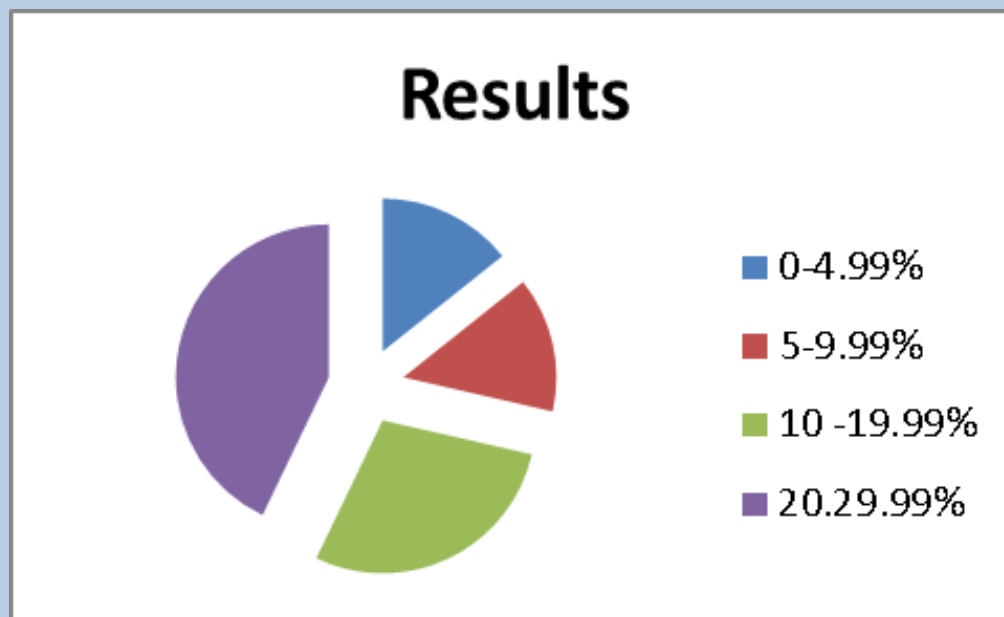
Question 2	If you are a Public Limited Company how much has your share price changed since 22/6/16?		
		Results from 86 surveys	Percent from 80 results
	Increase	15	18.75%
	Not applicable	55	68.75%
	Decrease	10	12.50%
	No response	6	N/A



Question 2.. Continued	For a Public Limited Company how much has your share price changed since 22/6/16?		
	Percentage of increase...	Results from 14 surveys	Percent from 14 results
	0-5%	4	28.60%
	5-6%	3	21.50%
	10 - 20%	1	7.10%
	20 - 30%	1	7.10%
	30% +	5	35.70%

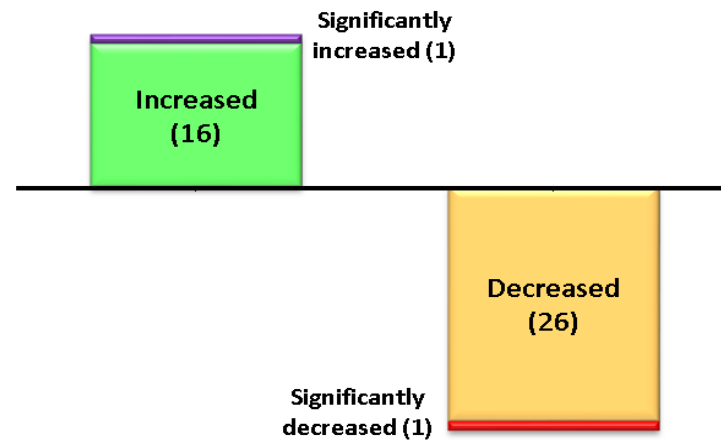
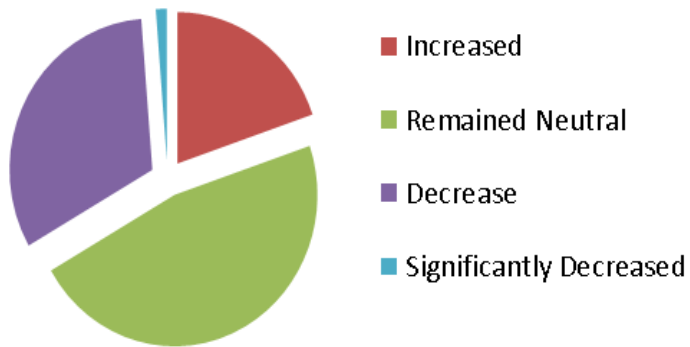


Question 2 Continued..	For a Public Limited Company how much has your share price changed since 22/6/16?		
	Percentage of Decrease...	Results from 7 surveys	Percent from 7 results
	0-5%	1	14.30%
	5-10%	1	14.30%
	10 -20%	2	28.60%
	20-30%	3	42.90%

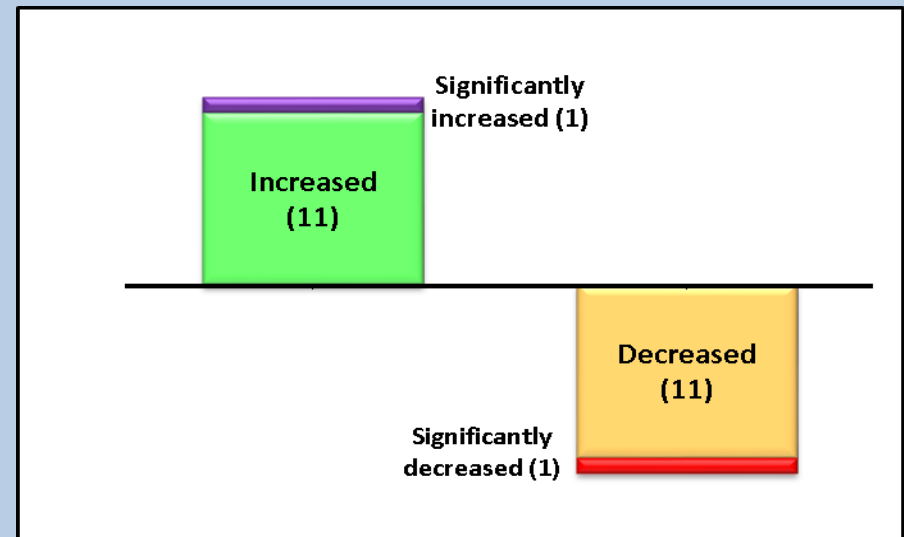
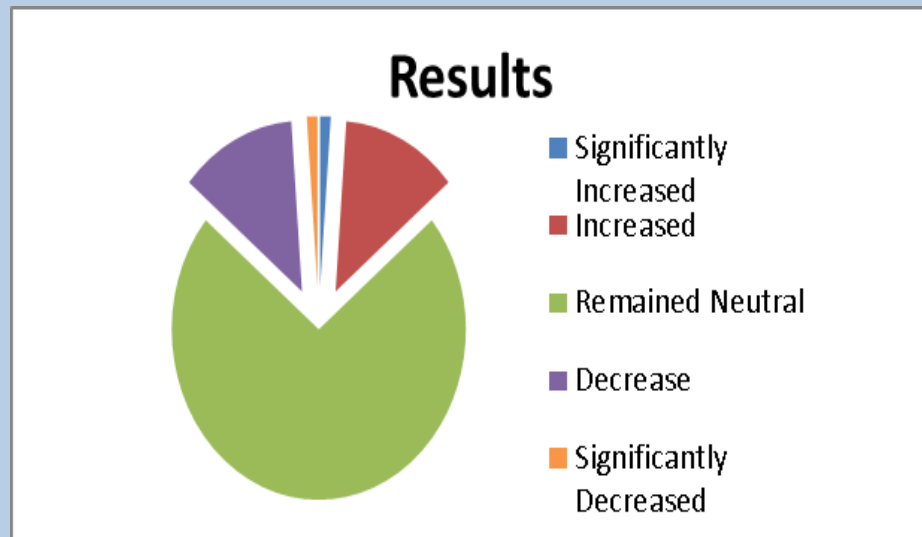


Question 3	How do you think construction companies share prices will change in next 12 months?	Results from 86 surveys	Percent out of 73 Results
	Significantly Increased	0	0
	Increased	16	19.80%
	Remained Neutral	38	46.90%
	Decrease	26	32.10%
	Significantly Decreased	1	1.20%
	No Response	5	N/A

Results

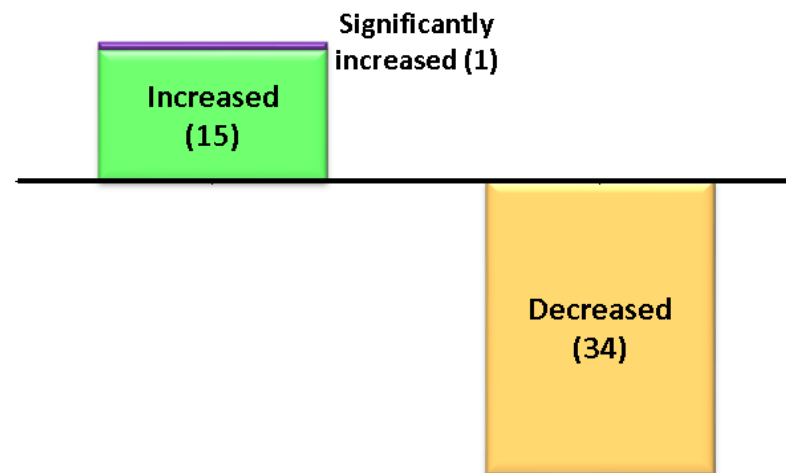
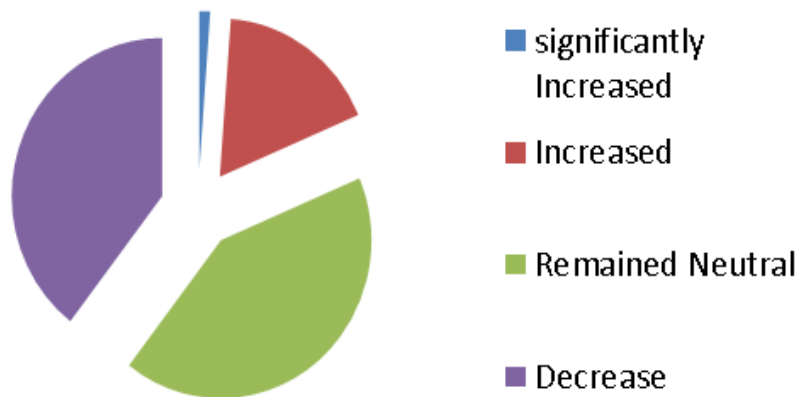


Question 4 How has the <u>volume of work</u> coming to the market changed since 22/6/16?			
A.	...For a 'Public Sector'	Results from 86 surveys	Percent from 86 results
	Significantly Increased	1	1.20%
	Increased	11	12.80%
	Remained Neutral	62	72.00%
	Decrease	11	12.80%
	Significantly Decreased	1	1.20%



Question 4	How has the <u>volume of work</u> coming to the market changed since 22/6/16?		
B.	...For ' <u>Private Sector</u> '	Results of 86 surveys	Percent from 86 results
	significantly Increased	1	1.20%
	Increased	15	17.40%
	Remained Neutral	36	41.90%
	Decrease	34	39.50%
	Significantly Decreased	0	0

Results



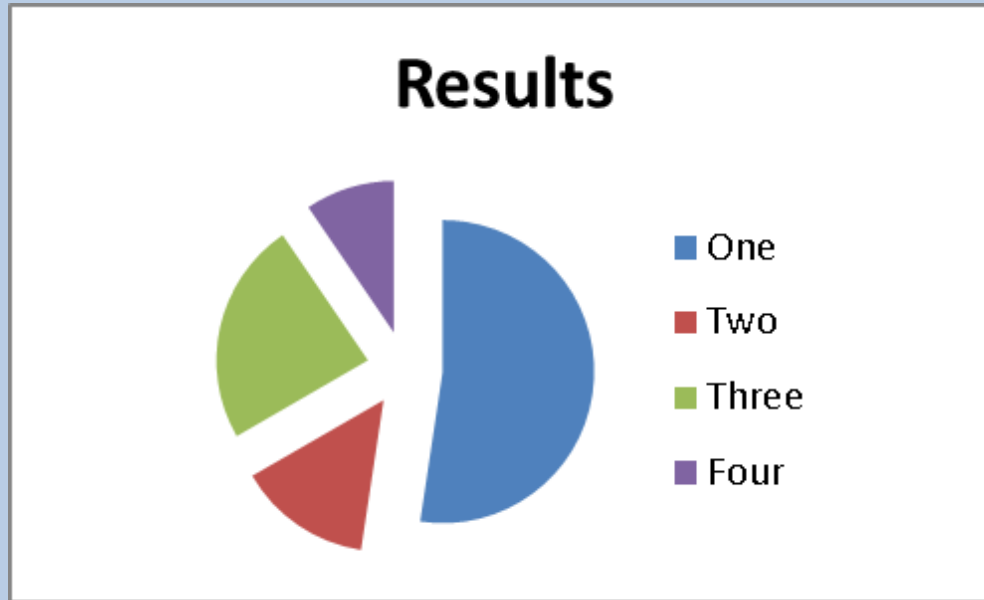
Question 4	Have any projects been cancelled as a result of Brexit?		
C.		Results of 86 surveys	Percent from 86 Results
	Yes	14	16.30%
	No	72	83.70%



Question 4	Have any projects been postponed for a significant period as a direct result of Brexit?		
D.		Results of 86 surveys	Percent from 86 results
	Yes	29	33.70%
	No	57	66.30%



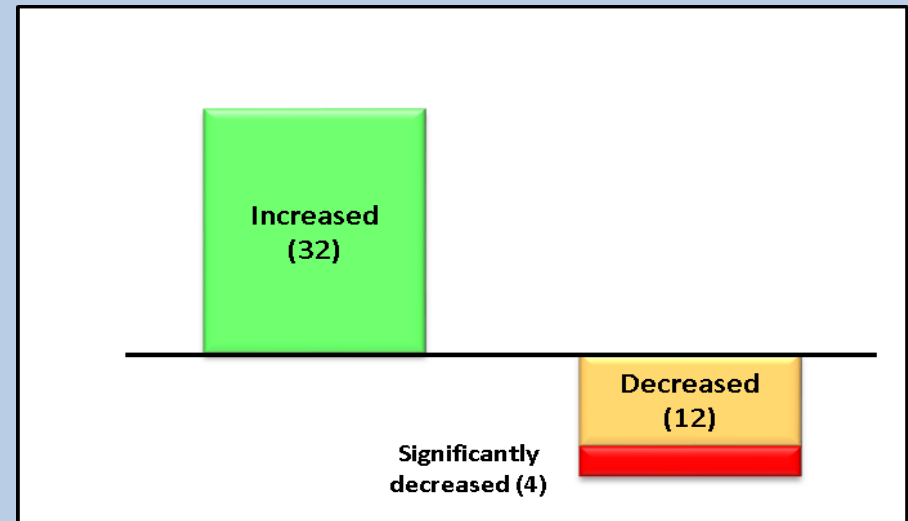
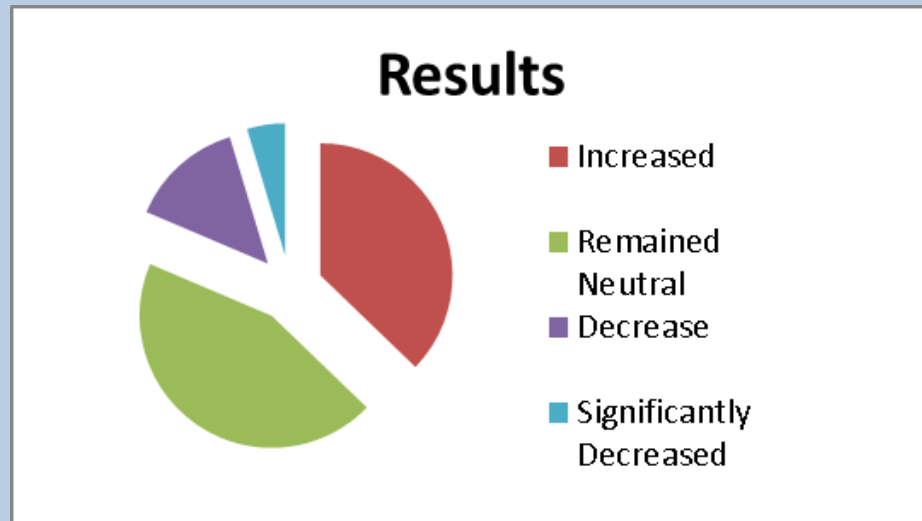
4D Comment	If yes how many..		
		Results of 78 surveys	Percent 21 results
	One	11	52.40%
	Two	3	14.30%
	Three	5	23.80%
	Four	2	9.50%
	No comment	65	N/A



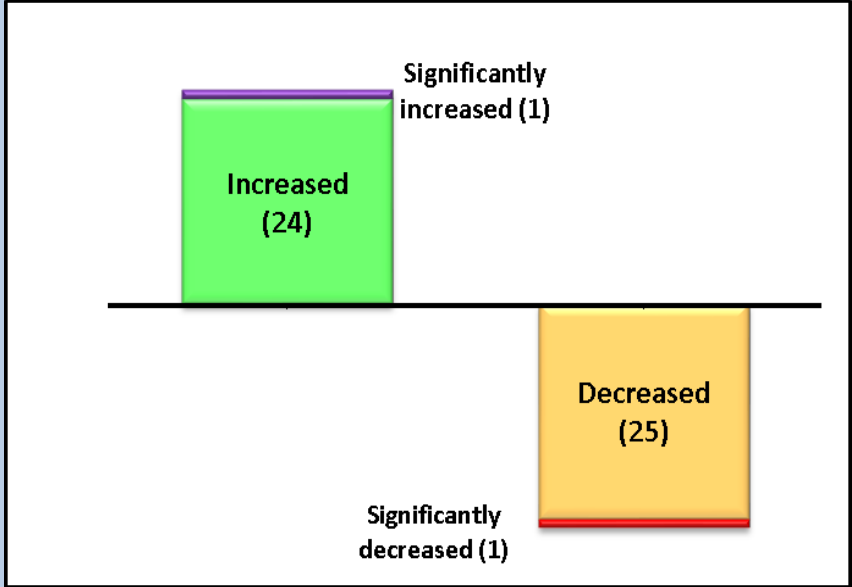
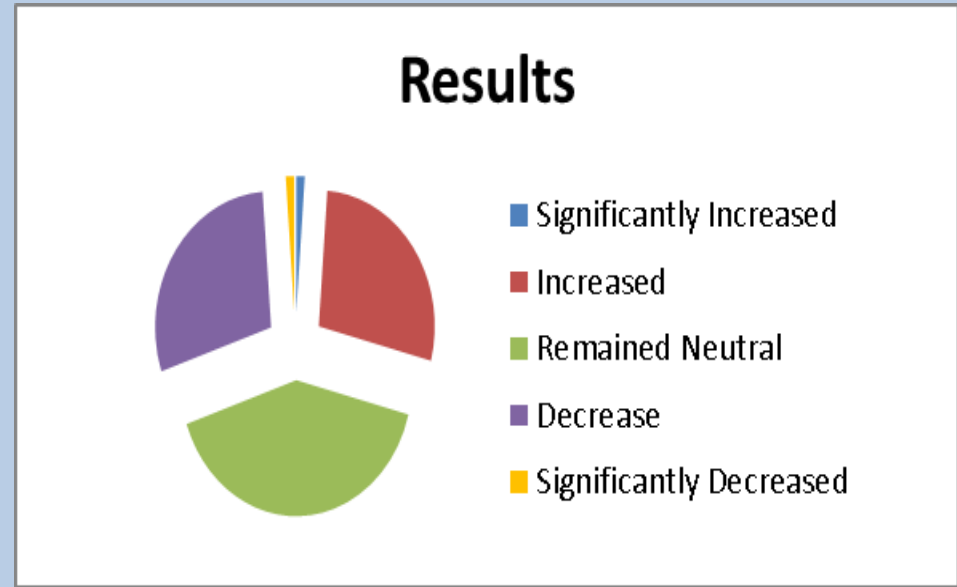
Question 4 Have any projects been accelerated as a direct result of Brexit			
E.		Results of 86 Surveys	Percent from 83 results
	Yes	5	6.03%
	No	78	93.97%
	No response	3	N/A



Question 5	The next 12 months how will the <u>volume of work</u> coming to the market change?		
A.	...For ' <u>Public Sector</u> '	Results of 86 surveys	Percent from 86 results
	Significantly Increased	0	0.00%
	Increased	32	37.20%
	Remained Neutral	38	44.20%
	Decrease	12	13.90%
	Significantly Decreased	4	4.70%

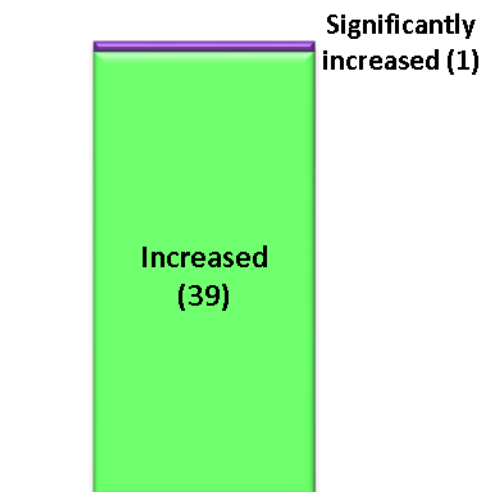
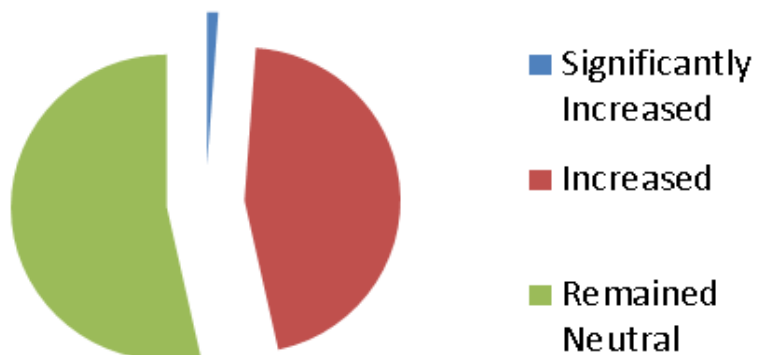


Question 5	The next 12 months how will the <u>volume of work</u> coming to the market change?		
B.	...For the ' <u>Private Sector</u> '	Results of 86 Surveys	Percent from 86 results
	Significantly Increased	1	1.20%
	Increased	24	27.90%
	Remained Neutral	35	40.70%
	Decrease	25	29.00%
	Significantly Decreased	1	1.20%



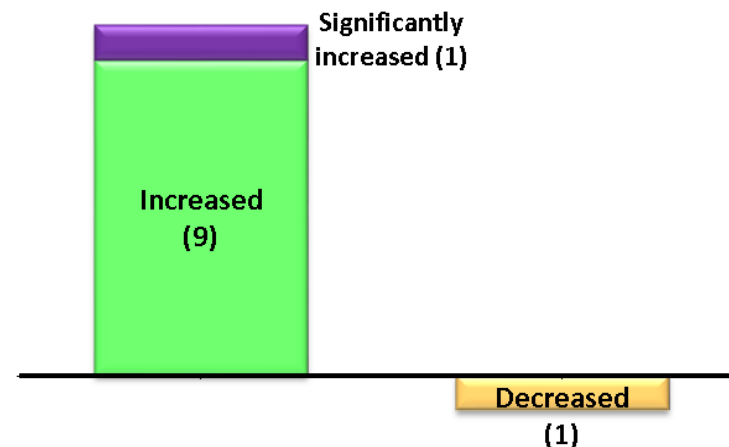
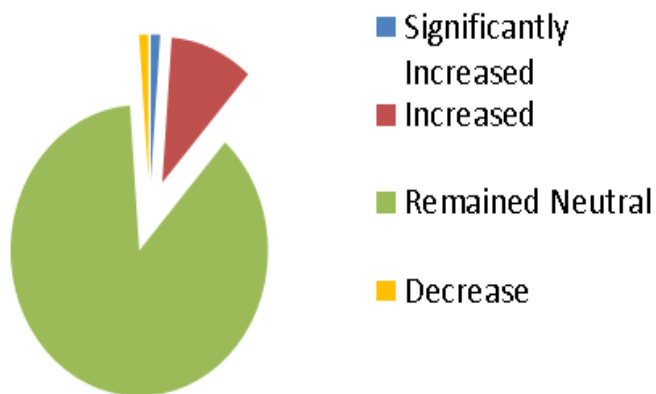
Question 6	How much has the fall in the exchange rate since 22/6/16 impacted on project construction costs?	Results of 86 Surveys	Percent of 78 results
	Significantly Increased	1	1.20%
	Increased	39	45.30%
	Remained Neutral	46	53.50%
	Decreased	0	0.00%
	Significantly Decreased	0	0.00%

Results



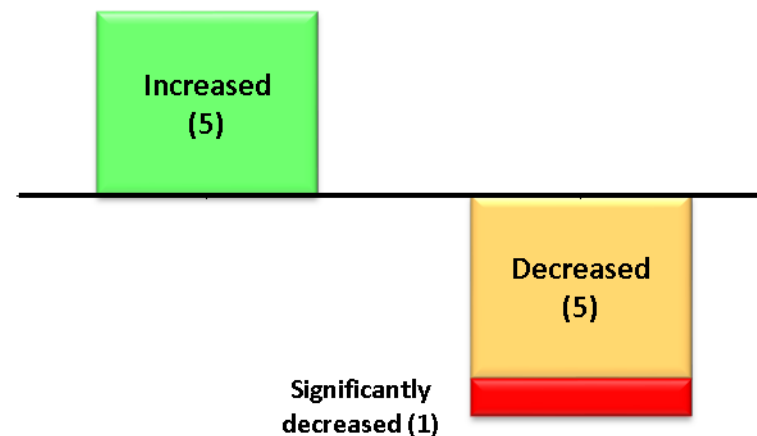
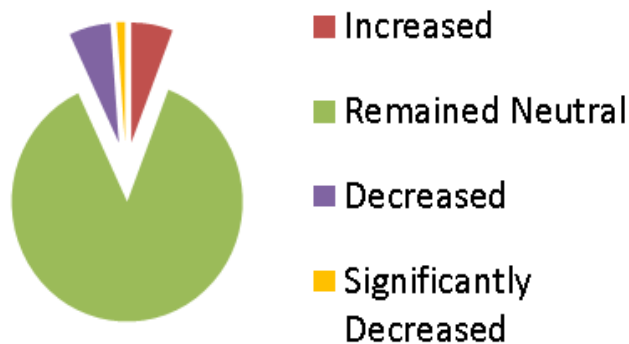
Question 7	How much has the fall in the exchange rates since 22/6/16 impacted on project construction?	Results of 86 Surveys	Percent from 86 results
	Significantly Increased	1	1.20%
	Increased	9	10.40%
	Remained Neutral	75	87.20%
	Decrease	1	1.20%
	Significantly Decreased	0	0.00%

Results



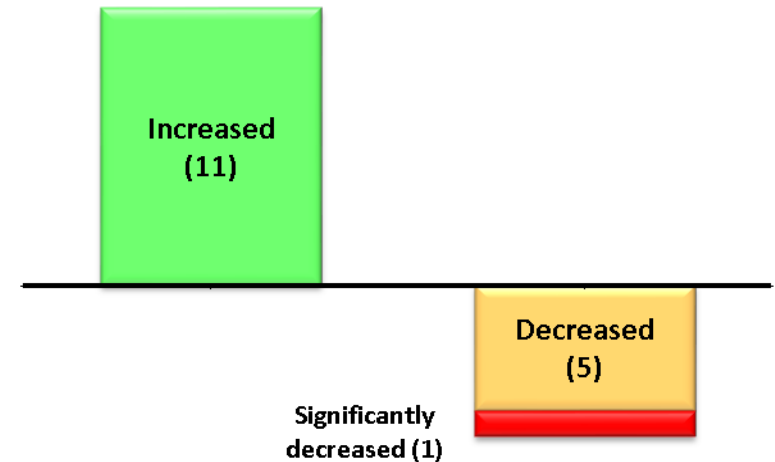
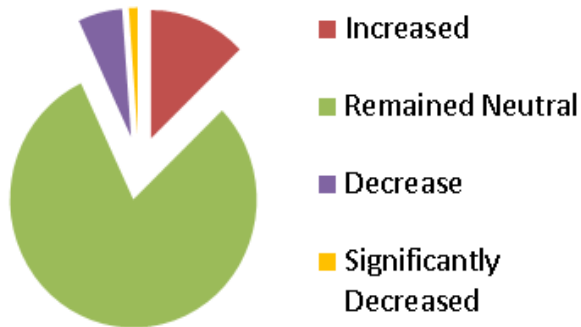
Question 8	How much has labour supply in the following groups <u>been effected since 22/6/1?</u>		
A.	...Site Operations	Results of 86 Surveys	Percent from 86 results
	significantly Increased	0	0
	Increased	5	5.80%
	Remained Neutral	75	87.20%
	Decreased	5	5.80%
	Significantly Decreased	1	1.20%

Results



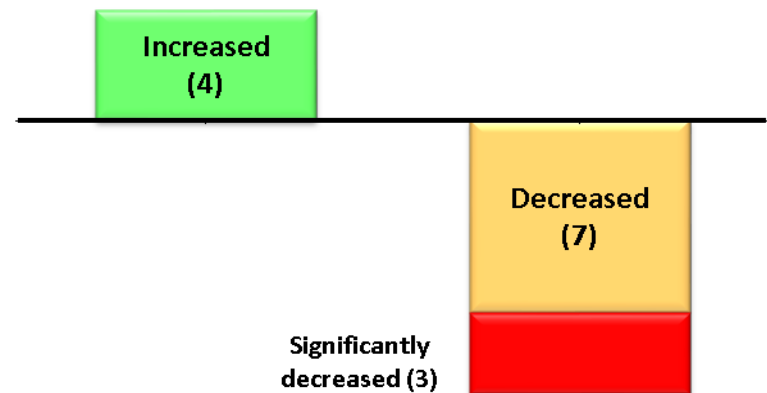
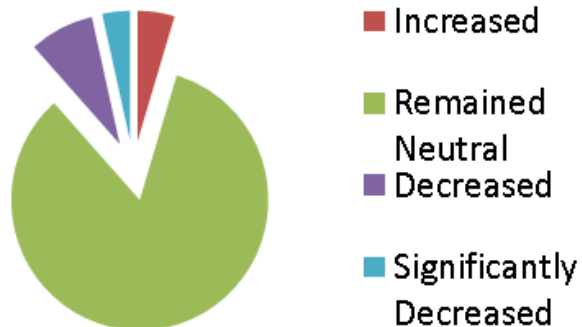
Question 8	How much has labour supply in the following group been effected since 22/6/16?		
B.	...Site Management Staff	Results of 86 Surevys	Percent from 86 results
	Significantly Increased	0	0
	Increased	11	12.80%
	Remained Neutral	69	80.20%
	Decrease	5	5.80%
	Significantly Decreased	1	1.20%

Results



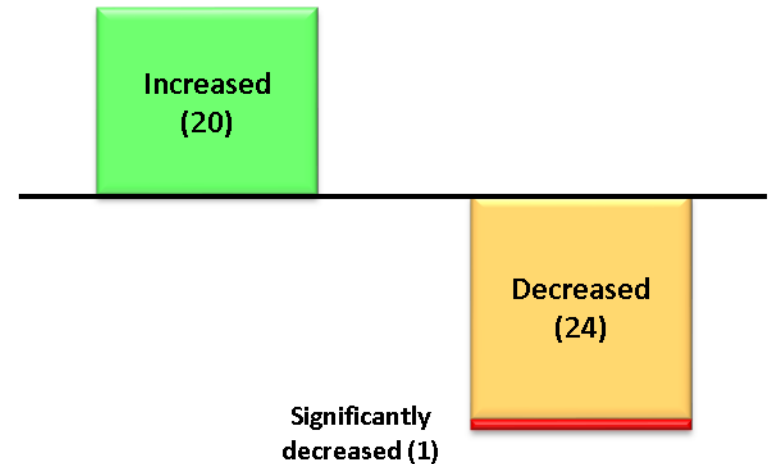
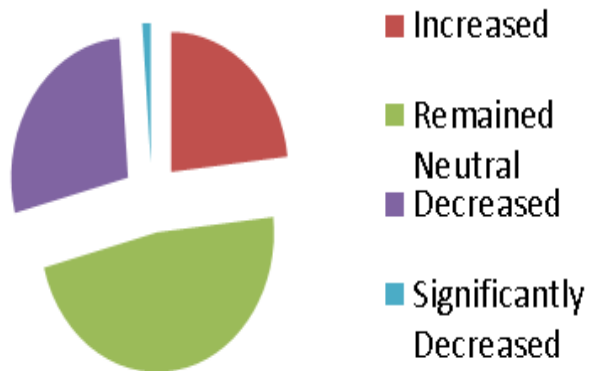
Question 8	How much has labour supply in the following group been effected since 22/6/16?		
C.	...Corporate (non Site) Management	Results of 86 Surveys	Percent from 86 results
	Significantly Increased	0	0
	Increased	4	4.70%
	Remained Neutral	72	83.70%
	Decreased	7	8.10%
	Significantly Decreased	3	3.50%

Results



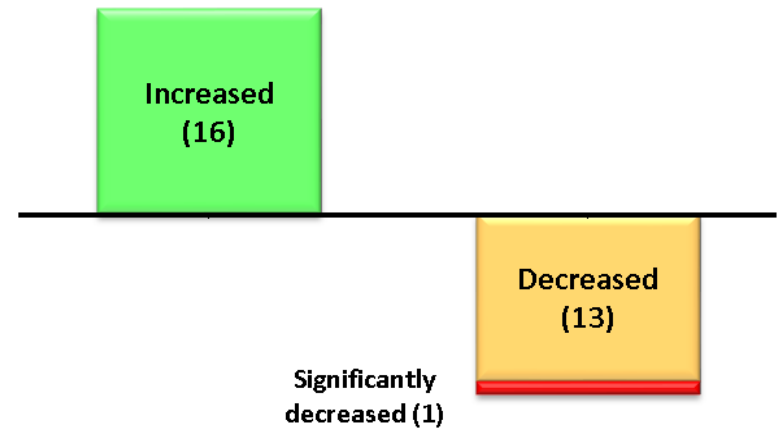
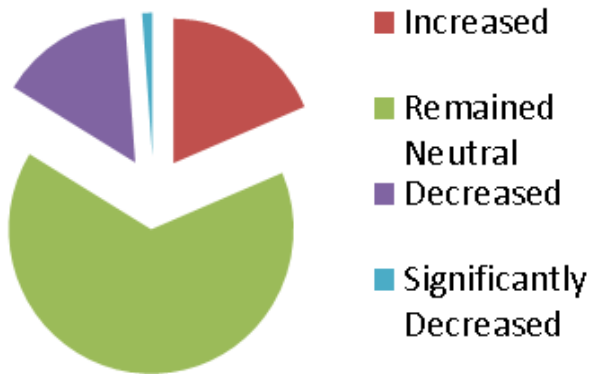
Question 9	How much will labour supply be effected in the next 12 months in the following group?		
A.	...Site Operatives	Results of 86 Surveys	Percent from 86 results
	Significantly Increased	0	0
	Increased	20	23.30%
	Remained Neutral	41	47.60%
	Decreased	24	27.90%
	Significantly Decreased	1	1.20%

Results



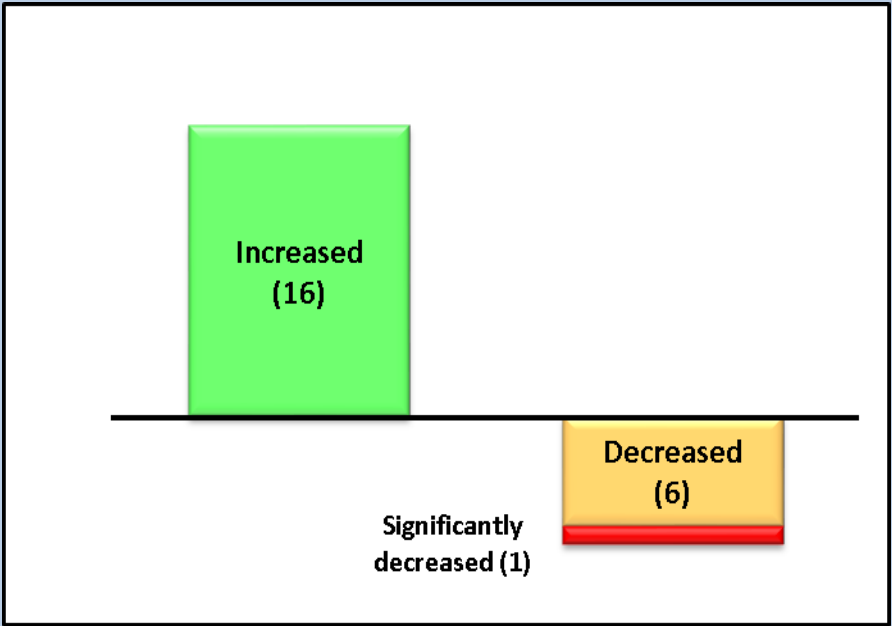
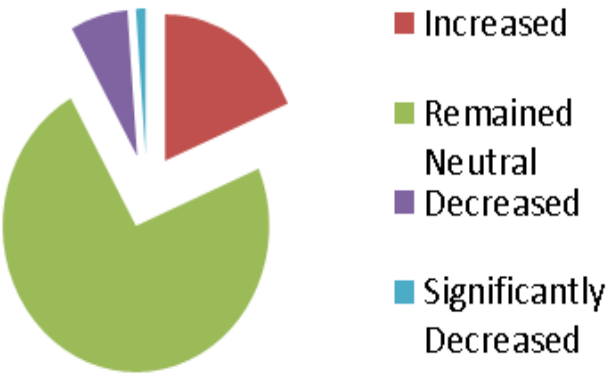
Question 9	How much will labour supply be effected in the next 12 months in the following group?		
B.	...Site Management Staff	Results of 86 surveys	Percent from 86 results
	Significantly Increased	0	0
	Increased	16	18.60%
	Remained Neutral	56	65.10%
	Decreased	13	15.10%
	Significantly Decreased	1	1.20%

Results



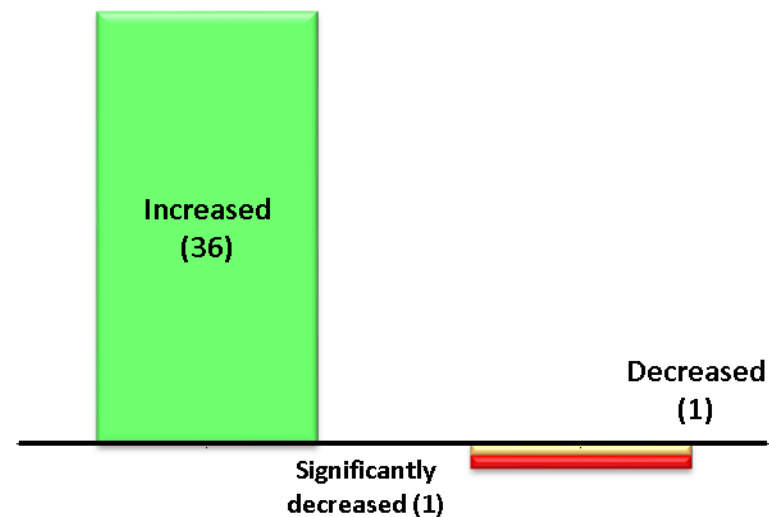
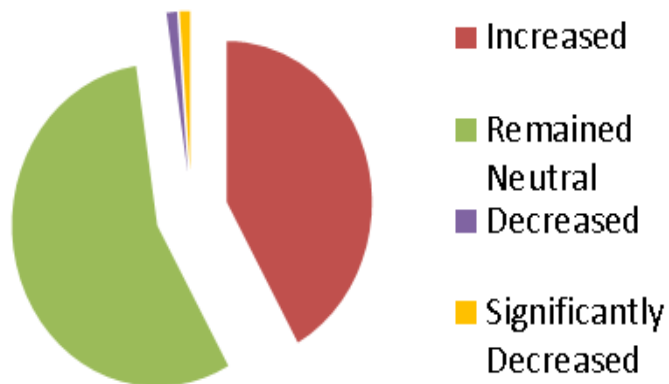
Question 9	How much will labour supply be effected in the next 12 months in the following group?		
		Results of 86 Surveys	Percent from 86 results
C.	...Corporate (non Site) Management		
	Significantly Increased	0	0
	Increased	16	18.60%
	Remained Neutral	63	73.30%
	Decreased	6	6.90%
	Significantly Decreased	1	1.20%

Results



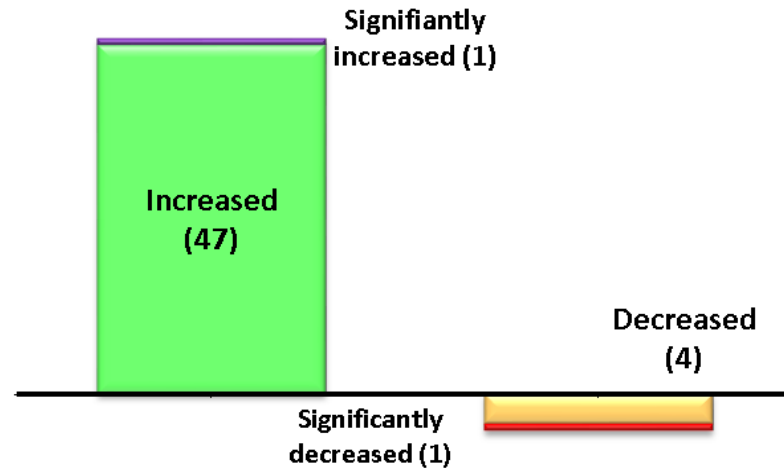
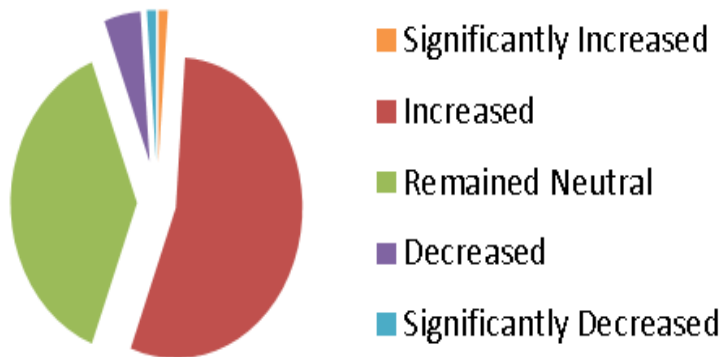
Question 10	How much have the following commodities/supplies prices changed since 22/6/16?		
A.	...Concrete / Aggregates / Bricks / Blocks	Results of 86 Surveys	Percent from 86 results
	significantly Increased	0	0
	Increased	36	41.80%
	Remained Neutral	48	55.80%
	Decreased	1	1.20%
	Significantly Decreased	1	1.20%

Results of 86 Surveys



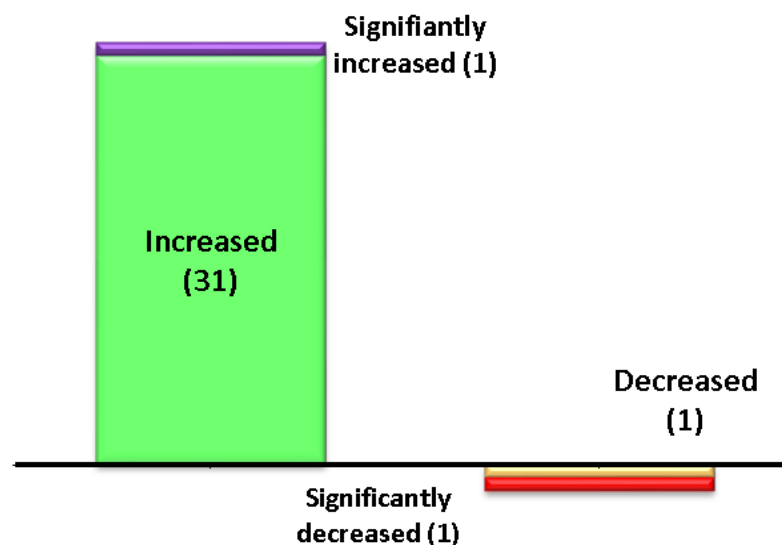
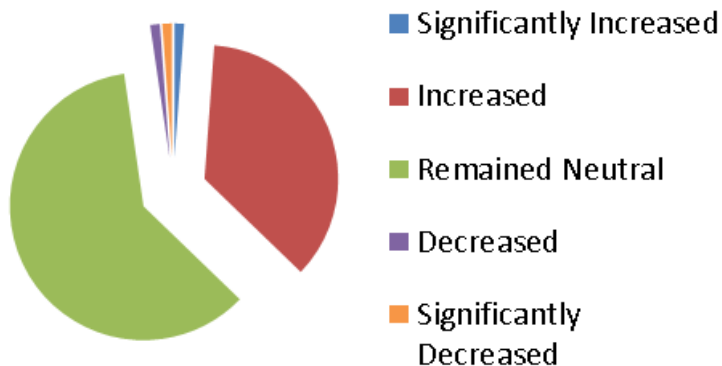
Question 10	How much have the following commodities/supplies prices changed since 22/6/16?		
B.	...Steel	Results of 86 Surveys	Percent from 86 results
	Significantly Increased	1	1.20%
	Increased	47	54.50%
	Remained Neutral	33	38.40%
	Decreased	4	4.70%
	Significantly Decreased	1	1.20%

Results

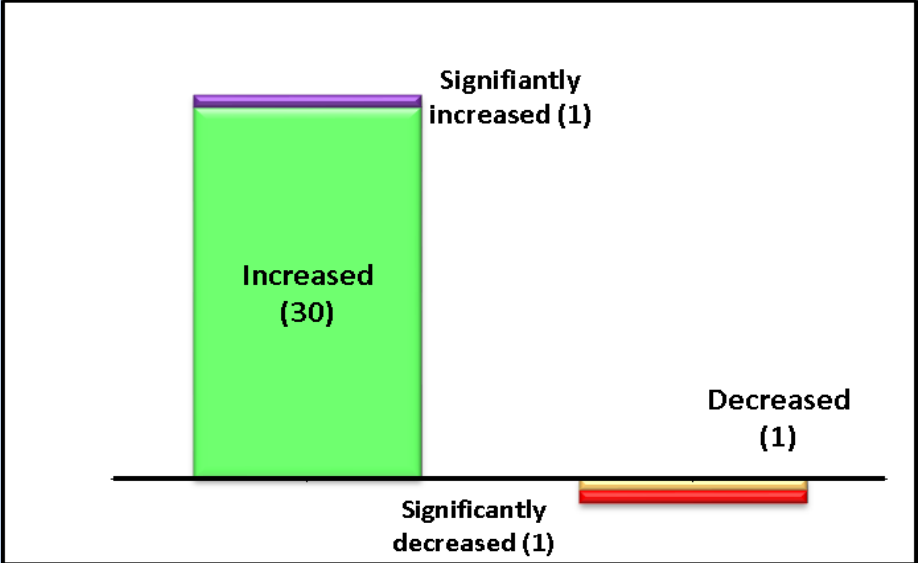
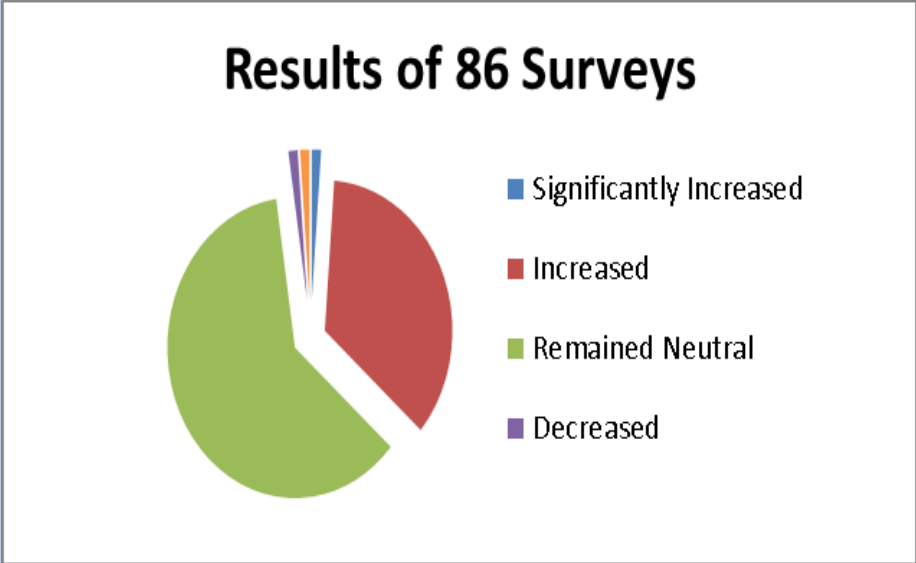


Question 10	How much have the following commodities/supplies prices changed since 22/6/16?		
C.	...Timber	Results of 86 Surveys	Percent from 86 results
	Significantly Increased	1	1.20%
	Increased	31	36.00%
	Remained Neutral	52	60.40%
	Decreased	1	1.20%
	Significantly Decreased	1	1.20%

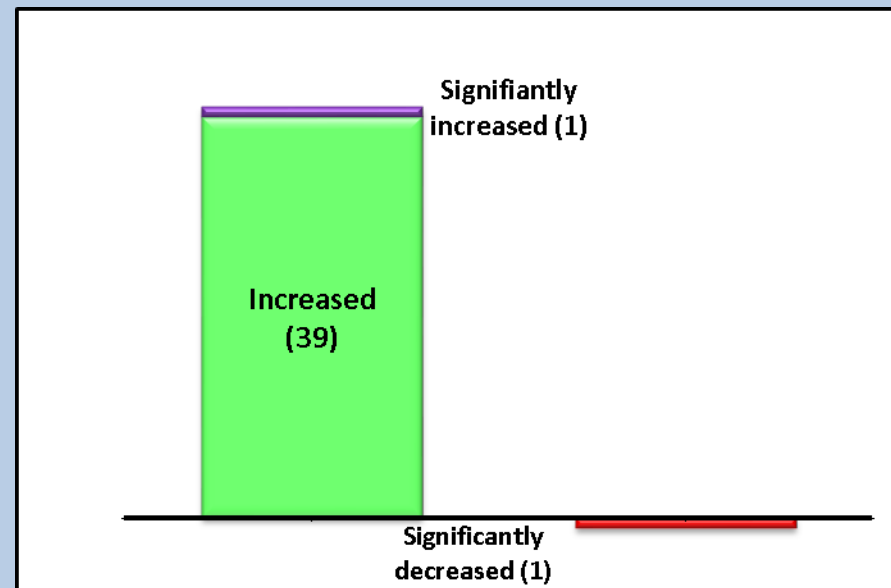
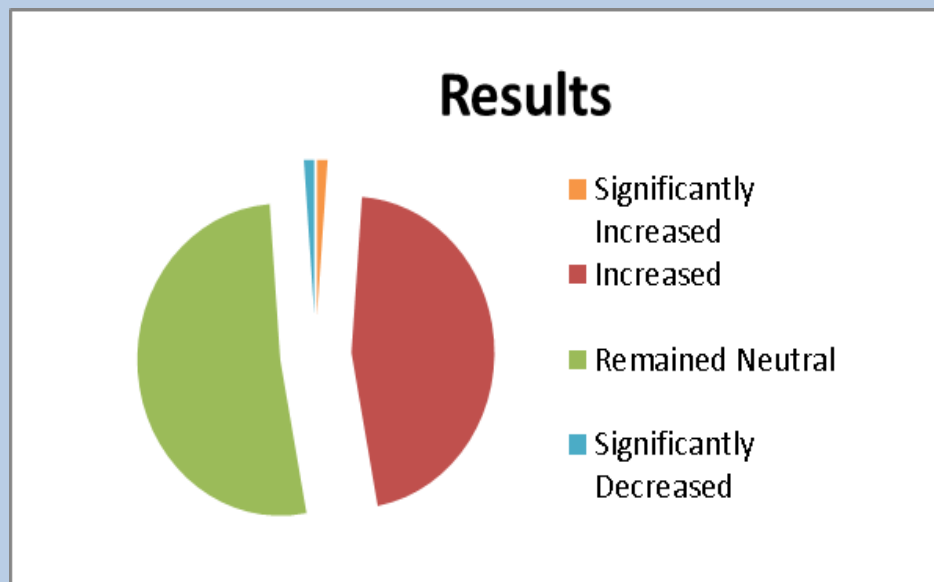
Results



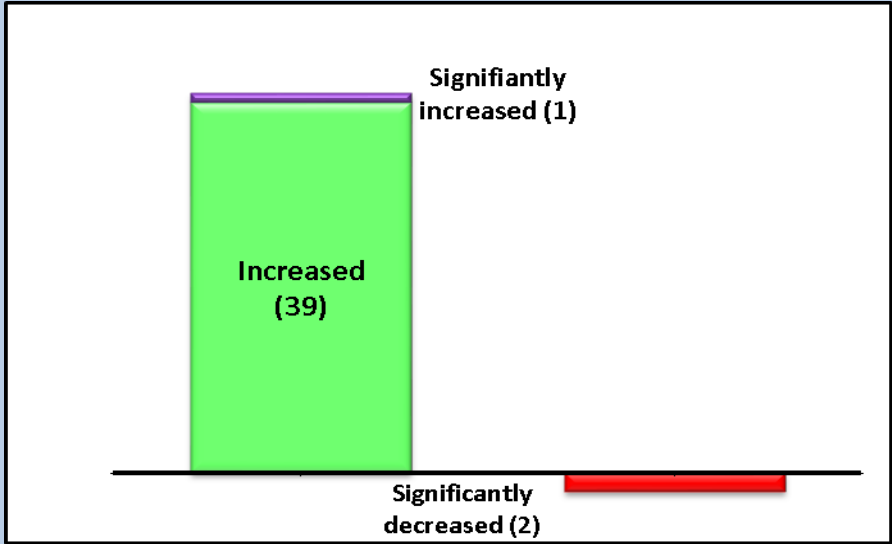
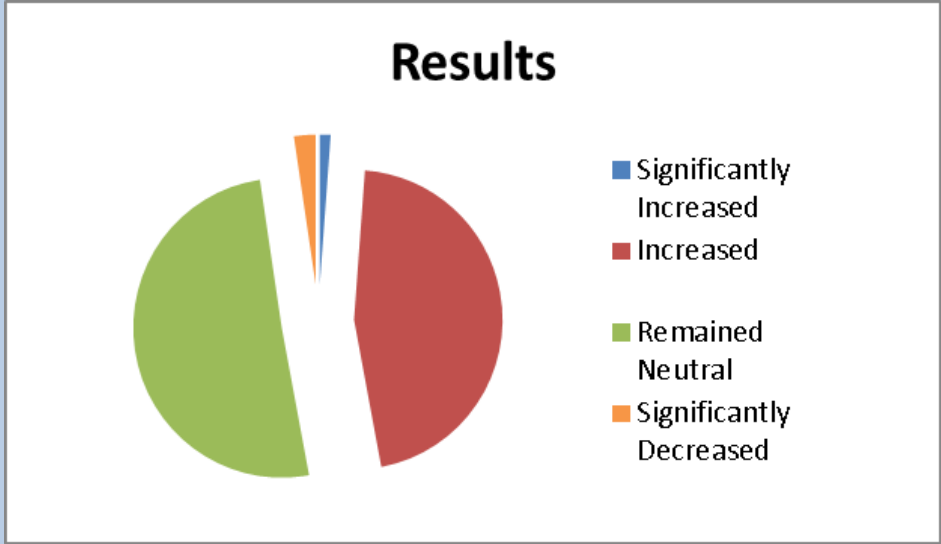
Question 10	How much have the following commodities/supplies prices changed since 22/6/16?		
D.	..Windows and Doors	Results of 86 Surveys	Percent from 85 results
	Significantly Increased	1	1.20%
	Increased	30	35.30%
	Remained Neutral	52	61.10%
	Decreased	1	1.20%
	Significantly Decreased	1	1.20%
	No Response	1	N/A



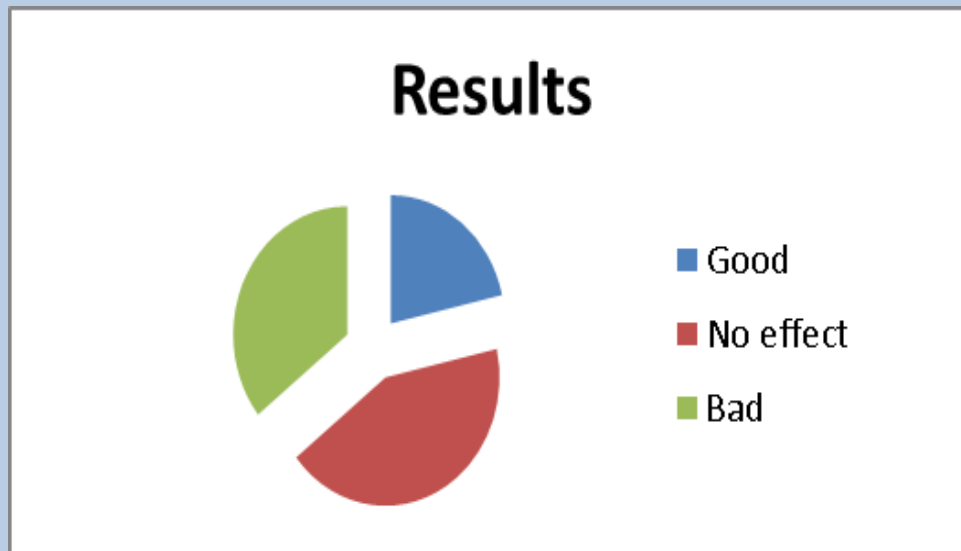
Question 10	How much have the following commodities/supplies prices changed since 22/6/16?		
E.	...Electrical equipment going into construction projects	Results of 86 Surveys	Percent from 85 results
	Significantly Increased	1	1.20%
	Increased	39	45.90%
	Remained Neutral	44	51.70%
	Decreased	0	0
	Significantly Decreased	1	1.20%
	No Response	1	N/A



Question 10	How much have the following commodities/supplies prices changed since 22/6/16?		
F.	...Mechanical equipment going into construction projects	Results of 86 Surveys	Percent from 85 surveys
	Significantly Increased	1	1.20%
	Increased	39	45.80%
	Remained Neutral	43	50.60%
	Decreased	0	0
	Significantly Decreased	2	2.40%
	No Response	1	N/A



Question 11	How would a quick exit of the UK from the EU affect the construction sector?		
		Results of 86 Surveys	Percent from 84 results
	Good	18	21.40%
	No effect	36	42.90%
	Bad	30	35.70%
	No Response	2	



	How many responses received from each Region
South East	17
South West	11
West Midlands	5
East Midlands	4
North East	3
London	7
North Wales	4
North West	15
Yorkshire and Humber	17
East of England	3
	=86 Surveys



How would a slow exit of the UK from the EU affect the construction sector?

