



CIOB

The Chartered
Institute of Building



FEDERATION OF
**MASTER
BUILDERS**

The SME State of Trade Survey

July to December 2025

Savanta:



State of Trade Survey

Second half of 2025



For more than 30 years, the State of Trade Survey has monitored key indicators and predicted future short-term developments for micro and SME building firms.

This is the second iteration of the refreshed State of Trade, with the survey commissioned by the Federation of Master Builders (FMB) and the Chartered Institute of Building (CIOB).

It is the only survey of its kind to focus exclusively on small and medium-sized (SME) firms throughout the construction sector. The report looks at activity from July to December 2025, referred to in this report as **H2 2025**. It also casts ahead to January to July 2026.

The FMB is the UK's largest representative body for SME building companies. The CIOB is the world's largest and most influential professional body for construction management and leadership.

The supporting survey to this report was sent to FMB members who are inspected builders and sent to CIOB's Chartered Companies who have been accredited by the CIOB.

Please note that in the last wave of the survey (H1 2025), there were changes in the sample composition that are still in effect for this wave. **A total of 493 responses were received, comprising of FMB members, CIOB members, joint FMB-CIOB members and Savanta's 'free-find' sample.**



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Key performance

indicators: All key measures returned a positive net balance; workloads (+22%), enquiries (+18%), and employment (+17%), however these all decreased compared to H1 2025.

Key indicators in the

home nations: All UK nations returned a positive net balance workload, with +35% in Northern Ireland, +28% in Scotland, +22% in England, and +7% in Wales. All home nations also saw positive net balance scores for enquiries, with +19% in England, +16% in Scotland, +14% in Wales, and +12% in Northern Ireland.

Key indicators in the

English regions: All English regions saw positive net change in workload, with +39% in the North, +24% in Greater London, +14% in the Midlands, and +12% in the South. However, only three of the four English regions returned positive net balance score for enquiries, with +39% in the North, +35% in Greater London, +12% in the South, then -11% in the Midlands.

Workload and enquiries

by sector: Every major sector saw positive net change in workloads, with house building at +23% and repair/maintenance at +26%. However, 'total enquiries' fell from +34% in H1 2025 to +19% with house building seeing a negative net change in enquiries with -6% (vs +11% in H1 2025). The score for repair and maintenance was +12%, compared to +25% in H1 2025. The negative change here is likely an effect of proposed changes to the National Planning Policy Framework (NPPF) causing greater uncertainty in the planning system. This will likely recover once a new NPPF is in place.



Every major sector saw positive net change in workloads, with house building at +23%

Type of activity by

sector: Renovation (70%), home improvement (70%), and major works (65%) were the top three most common activities.

Employment and skills

shortages: Employment is still on the rise (35% saw an increase), but skilled trade recruitment remains a challenge, with respondents reporting that carpenters (30%), bricklayers (29%), and plumbers/HVAC trades (23%) as most difficult to recruit.



Employment is still on the rise

The difficulty of

recruiting staff: 51% have found it difficult to recruit staff with building safety regime knowledge and 57% on understanding of modern sustainable building practices, and 58% reported difficulty finding staff with knowledge of new technologies to help businesses innovate.

Impact of a lack of skilled

tradespeople: 72% of firms were affected by skilled labour shortages, resulting in job delays for 49%, halting plans for company expansion for 30%, and leading to jobs being cancelled for 22%.

Job delays: Among those experiencing delays, 40% were due to extreme weather or climate events, 36% were due to delays in the planning process, and 35% were due to market uncertainty.

Among those experiencing delays, 40% were due to extreme weather or climate events



Prices and costs: In H2 2025, 75% have seen increased material costs, 57% have experienced rising wages, and 61% have increased the price they charged for their work.



75% have seen increased material costs

Impact of cost increases: Increased outgoing costs led 56% to raise prices, 51% to report lower-than-expected profits or losses, 34% to restrict recruitment, 20% to fear for business viability, and 16% to make redundancies.



Increased outgoing costs led 56% to raise prices

Contracting companies: 42% changed contractors, and of those who changed - 49% did so to respond to competition, 47% to improve cost-effectiveness, 39% reacting to poor performance, and 24% were forced to as a result of insolvency.

Invoice payment: 57% had their invoices paid on time, 29% received payments on a varied timeline, and 13% reported frequent late payments.



57% had their invoices paid on time

Business outlook for H1 2026: Looking forward 48% of businesses have a positive outlook, 38% are neutral, and only 8% hold a negative view for the first half of 2026. When it comes to impacts of changes on the construction industry, 32% of respondents feel that the relaxation of BNG requirements on small sites will have a positive impact, but 47% think that changes in National Insurance contributions will have a negative impact.

Key indicators



Construction Industry Outlook: Q3 and Q4 2025 (H2 2025)

In the second half of 2025, all of the key performance indicators (workload, employment, and enquiries) experienced net increases, but the figures fell compared to those seen in the first half of 2025. After the gains in the preceding wave, the latest results reflect a slower pace of growth. Nevertheless, all three net figures remain positive, indicating continued improvement across the board.

Workload

Respondents reported a net workload increase of +22% in H2 2025, which is a slight decrease from +25% in H1 2025. This is the first time since Q2 and Q3 2023 where the net change of workload has been positive for consecutive waves.

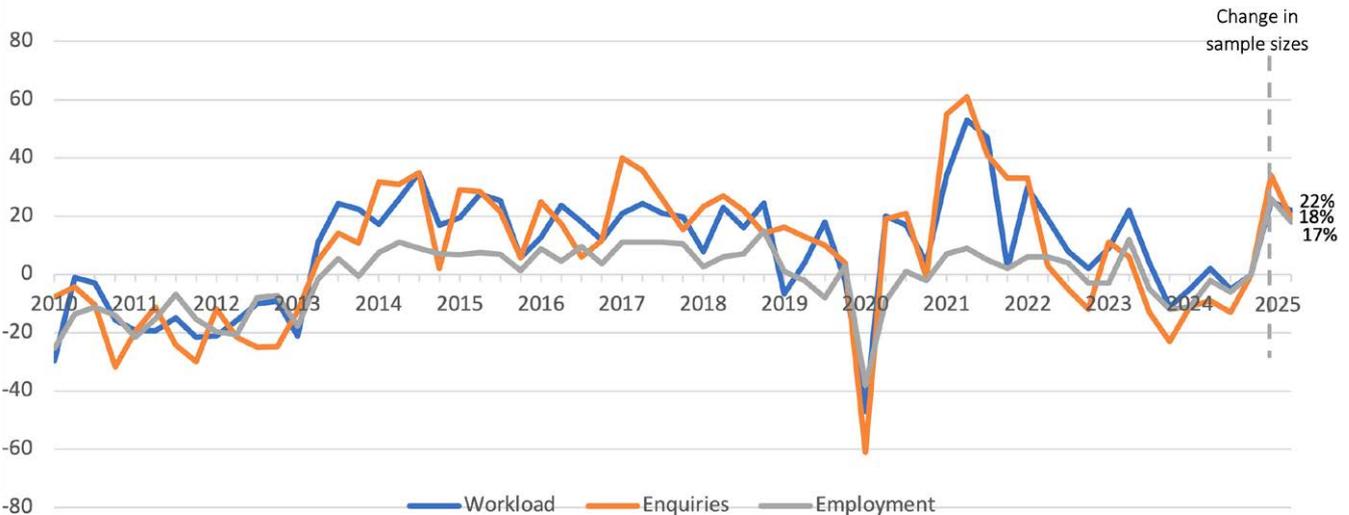
Employment

Employment was reported as a net increase, but this value fell from +26% in H1 2025 to +17% in H2 2025. However, the positive values for net change in employment are the highest they have been on record, with the next highest figure being +15% in Q4 2018.

Enquiries

The industry saw a net increase of +18% in new enquiries in the H2 2025, compared to +34% in H1 2025. Even with this decrease, this figure continues to be positive, and comparable to figures seen before the Covid-19 pandemic.

Key indicators



Graph 1 – Q3. Looking back, how does your company's workload in the period of July to December 2025 (Q3 and Q4) compared to that in April to June 2025 (Q2), thinking about total workload, and in the specific sectors of the industry that you work in? (n=493) Q6. Looking back, how has the level of enquiries regarding future work changed in the period of July to December 2025 (Q3 and Q4) compared to that in April to June 2025 (Q2), thinking about total enquiries, and in the specific sectors of the industry that you work in? (n=493) Q8. How has the number of employees within your company's workforce changed during the period of July to December 2025 (Q3 and Q4) compared to that in April to June (Q2)? (n=493) Graph shows net balance of change





Workload and enquiries by sector



In H2 2025, respondents once again reported increases across both total workload and total enquiries within the construction sector. However, the net balance figures are lower than the last wave (H1 2025). The net balance for total workload fell to +22%, down from +25% in H1 2025. Similarly, total enquiries also declined, falling to +19% from +34% in the previous half of 2025.

The industrial and commercial sectors saw growth in workload and enquiries, returning a net workload change of +11%, up from +6%. Enquiries for this sector moved to a net positive figure of +7% in H2 2025, compared to -4% in H1 2025, perhaps indicating the positive influence of an enshrined infrastructure strategy.

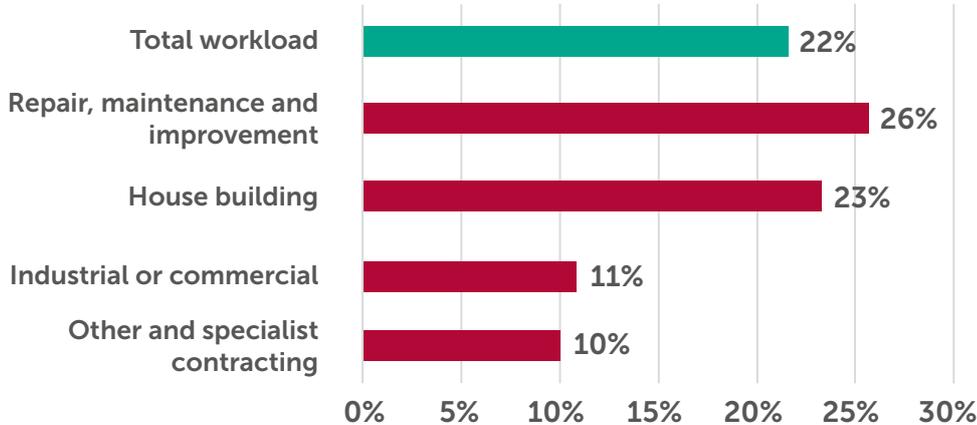
Those active in the other and specialist contracting sectors noted increases in both workload and enquiries. Net change in workload is +10% in

H2 2025, compared to +1% in H1 2025, whilst net change in enquiries returned a positive figure of +6%, up from -10% last half.

For the repair, maintenance and improvement sector, respondents reported net positive figures for both workload and enquiries, but these are not as strong as H1 2025. Net change in workload decreased by 9 percentage points to +26% (+35% in H1 2025), and net change in enquiries fell by 13 percentage points to +12% (+25% in H1 2025).

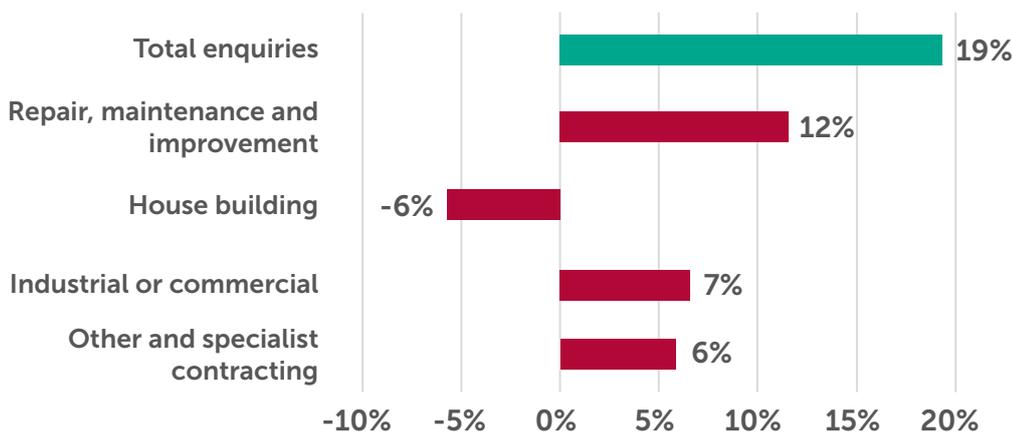
The house building sector has had the most notable decline across workload and enquiries this half. Respondents reported a net workload change of +23%, a decline of 16 percentage points from +39% in H1 2025. Enquiries also fell, returning a net negative of -6% from +11% in the previous half of 2025.

Workload by sector



Graph 2 - Q3. Looking back, how does your company's workload in the period of July to December 2025 (Q3 and Q4) compared to that in April to June (Q2), thinking about total workload, and in the specific sectors of the industry that you work in? Base: Total workload (n=493); Repair, maintenance and improvement (n=466); House building (n=371); Industrial or commercial (n=376); Other and specialist contracting (n=358) Excluding N/As

Enquiries by sector



Graph 3 - Q6. Looking back, how has the level of enquiries regarding future work changed in the period of July to December 2025 (Q3 and Q4) compare to that in April to June (Q2), thinking about total enquiries, and in the specific sectors of the industry that you work in? Base: Total enquiries (n=493); House building (n=396); Repair, maintenance and improvement (n=466); Industrial or commercial (n=382); Other and specialist contracting (n=372) Excluding N/As

Type of activity by sector

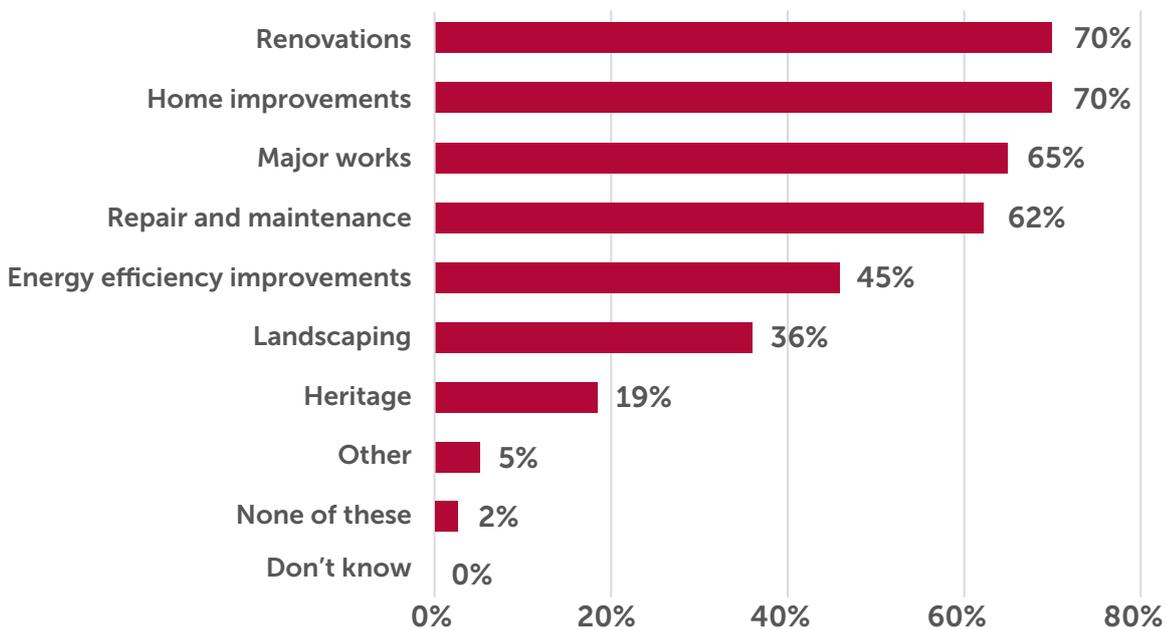


Renovation, home improvement, and major works are the top three types of work delivered by respondents in H2 2025. In H1 2025, the leading types of work were renovation, home improvement, and repair and maintenance.

Other commonly reported types of work include repair and maintenance (62%), energy efficiency improvements (45%) and landscaping (36%). All types of repair works increased in H2 2025, apart from heritage which fell by 2 percentage points.

Renovation is the joint-most common activity with home improvements, both with 70% of respondents reporting their involvement in these areas. This is an increase of 6 percentage points for renovation (64% in H1 2025), and a 7 percentage point increase for home improvement (63% in H1 2025). Major works is ranked third, with 65% reporting this in H2, up from 55% in H1 2025.

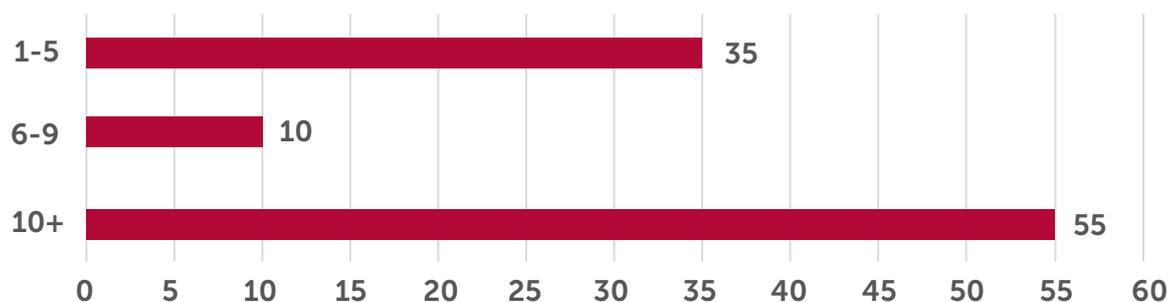
Types of repairs, maintenance and improvement works that has been delivered in the period of July to December 2025



Graph 4 - Q4. You said that your company works in the repair, maintenance and improvement sector. Which of the following repair, maintenance and improvement works has your company delivered for existing domestic dwellings in the period of July to December 2025 (Q3 and Q4)?
Base: All working in the RMI sector. (n= 466)

In the second half of 2025, more respondents reported building larger numbers of houses compared to the first half. Around one in three respondents (35%) built between 1 and 5 houses, and one in ten (10%) built 6 to 9 houses, which is a notable decrease from 27% in the first half of 2025. The share of respondents building 10 or more houses rose to 55%, which is a significant increase from 12% in H1 2025.

Number of houses that have been built in the period of July to December 2025



Graph 5 - Q5. How many housing starts has your company done in the period of July to December 2025 (Q3 and Q4)? Base: All working in the housebuilding sector excluding no housing starts and don't know (n=270)



Employment and skills shortages



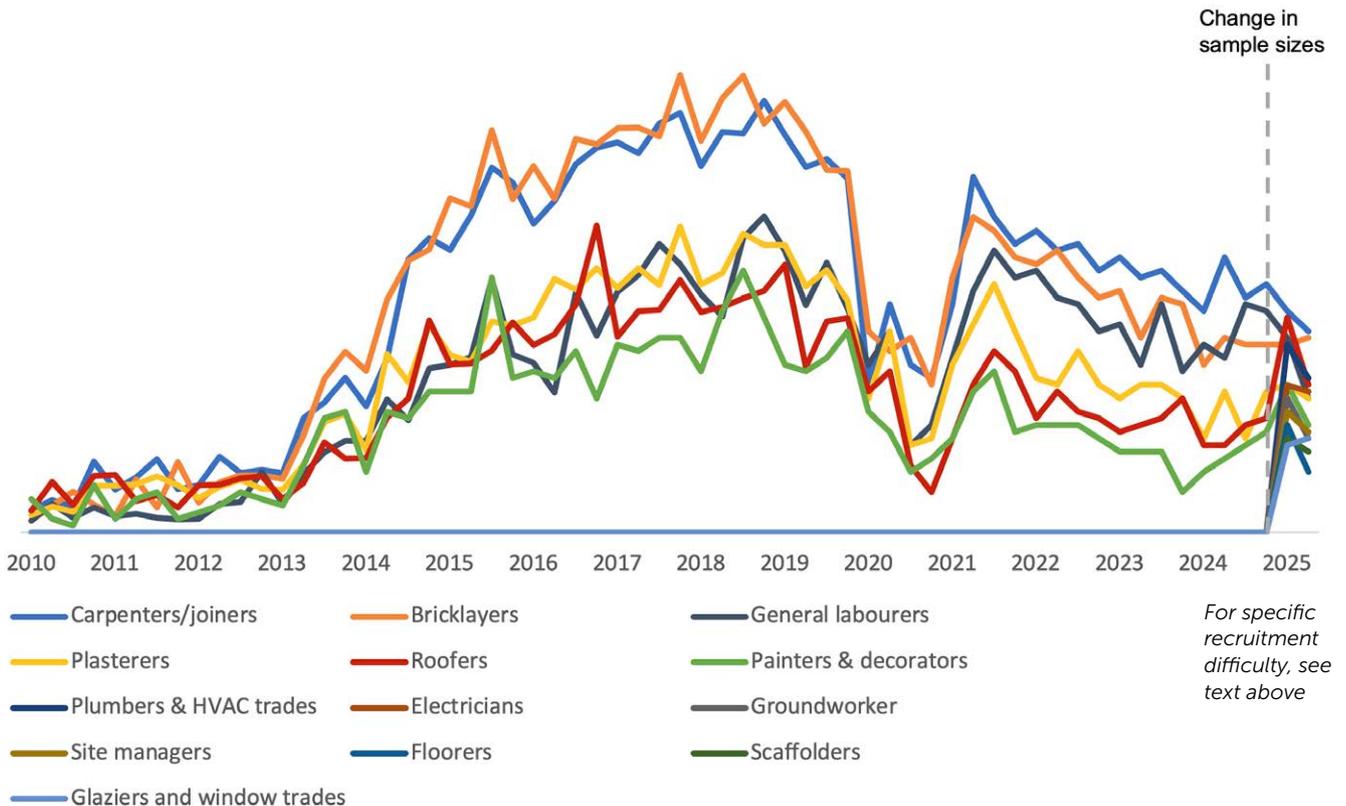
In H2 2025, 47% of respondents reported no change in their company's workforce size, this is a similar proportion to H1 2025 with 48%. In employee numbers, 35% of respondents reported an increase, this was down from 39% in the H1 2025. Conversely, 18% of respondents said their workforce had decreased, up from 13% in H1 2025.

While most roles have become slightly easier to recruit compared to H1 2025, challenges persist for certain occupations:

- Carpenters remain the hardest position to fill, with 30% of respondents identifying this as their most difficult recruitment area. Notably, this is the first time since 2020 that the difficulty to recruit carpenters has been below 33%.

- Bricklayers are the second most difficult role to recruit, with reported difficulty rising to 29% (28% in H1 2025).
- Plumbers and HVAC trades are the third most difficult role to recruit, even though the reported difficulty fell to 23% from 28% in H1 2025.
- The reported difficulty in recruiting roofers dropped by 10 percentage points from 32% in H1 2025 to 22% in H2 2025, and 20% of respondents reporting that general labourers are difficult to recruit, falling from 29% in H1 2025.
- Other roles where recruitment was noted as challenging included electricians (21%), plasterers (20%), painters and decorators (16%), site managers (15%), groundworkers (14%), glaziers and window trades (14%), scaffolders (12%), and floorers (9%).

Difficulty in recruiting for each of the following occupations



Graph 6 - Q10. For which of the following trades has your company found it difficult to recruit skilled staff over the period of July to December 2025 (Q3 and Q4)? Base: Total (n=493)

Difficulties in recruiting staff



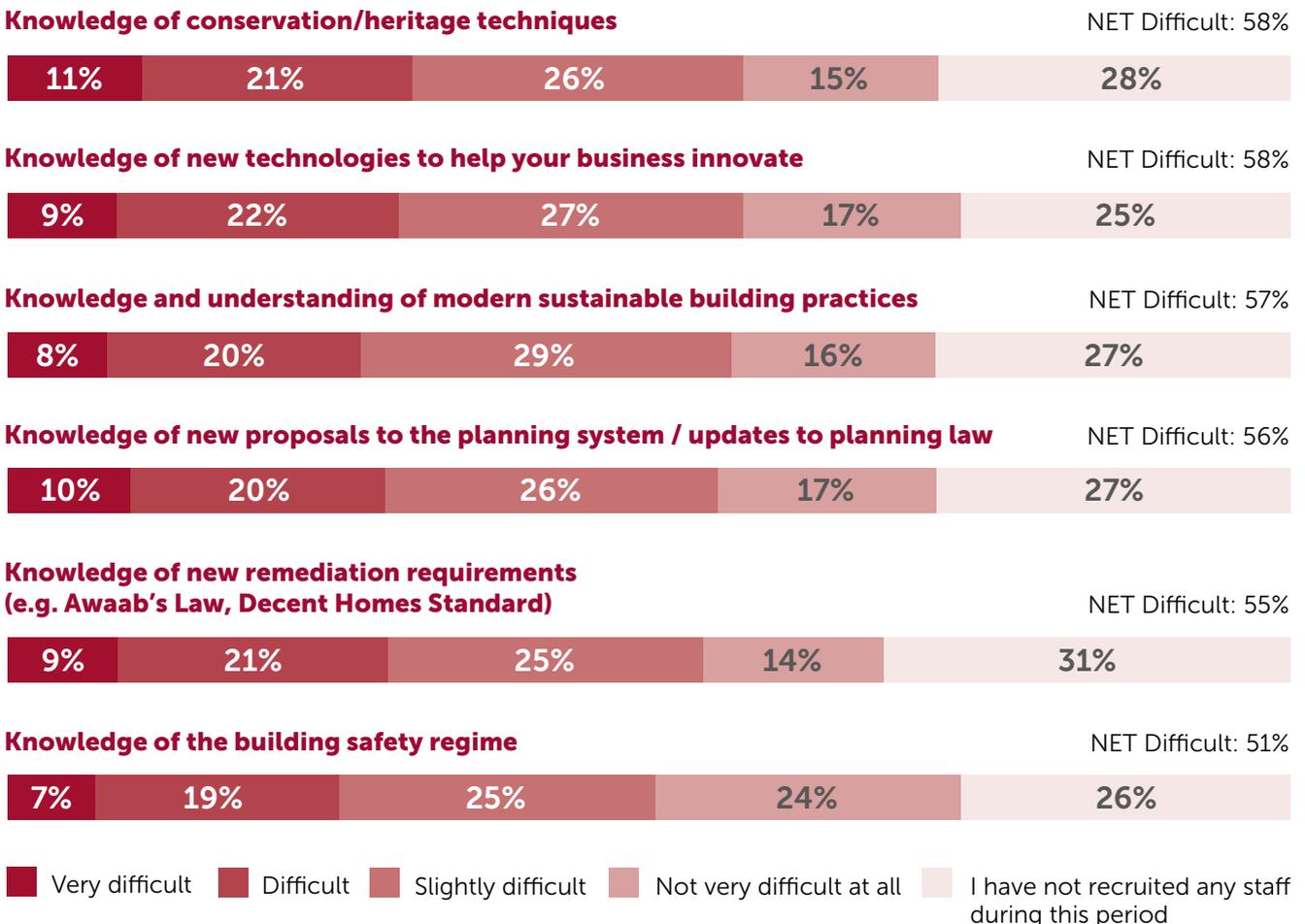
When it comes to recruiting new staff with specialist skills, notably fewer respondents reported that it is difficult to find candidates with knowledge of the building safety regime, with 51% in H2 2025 compared to 64% in H1 2025. Remaining at a similar level to H1 2025, around three in five respondents (57% in H2 2025 vs 59% in H1 2025) indicated challenges in recruiting staff with knowledge and understanding of modern sustainable building practices and those with knowledge of new technologies to support business innovation (58% in H2 2025 vs 59% in H1 2025).

This wave, respondents were asked about difficulties in recruiting staff with three more skills. Recruiting staff with knowledge of conservation/

heritage techniques (58%) was reported as the most difficult of the new skills, with knowledge of new proposals to the planning system (56%) and knowledge of new remediation requirements (55%) close behind.

This highlights the recruitment difficulties for employers seeking expertise in these critical areas. Particularly concerning is the figure about the difficulty to recruit staff with knowledge of new remediation requirements, especially given the increasing need to remediate older properties as set out by the UK Government's Warm Homes Plan and the results of consultations on Energy Performance Certificates (EPC) and Minimum Energy Efficiency Standards (MEES).

The difficulty of recruiting staffs with the following skills



Graph 7 - Q19. Thinking about the range of skills and competencies needed in your company, how difficult has it been to recruit staff with any of the following skills from July to December 2025 (Q3 and Q4)? BASE: All respondents (n=493)

The impact of a lack of available skilled tradespeople

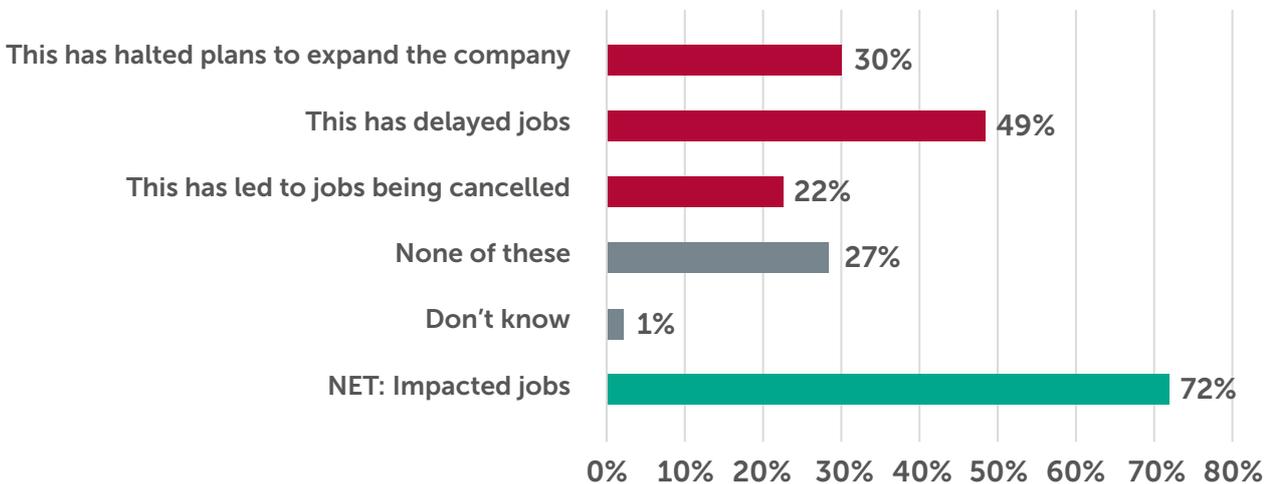


In H2 2025, 72% of respondents reported being affected by a lack of skilled tradespeople, this is a significant increase from 61% in H1 2025.

Nearly half (49%) said that shortages had caused job delays, while around one in four (22%) indicated it had led to job cancellations. Nearly a third of respondents (30%) reported that the lack of skilled tradespeople halted plans to expand the company, which was a new answer option introduced in this wave. The proportion of respondents who said the lack of skilled workers had neither delayed jobs or caused cancellations decreased notably, from 37% in the first half of 2025 to 27% in the second half.



The impact of a lack of available skilled tradespeople July to December 2025



Graph 8 - Q13_W13. How, if at all, has the lack of skilled trades people impacted your company's work over the period of July to December 2025 (Q3 and Q4)? Base: All respondents (n=493)

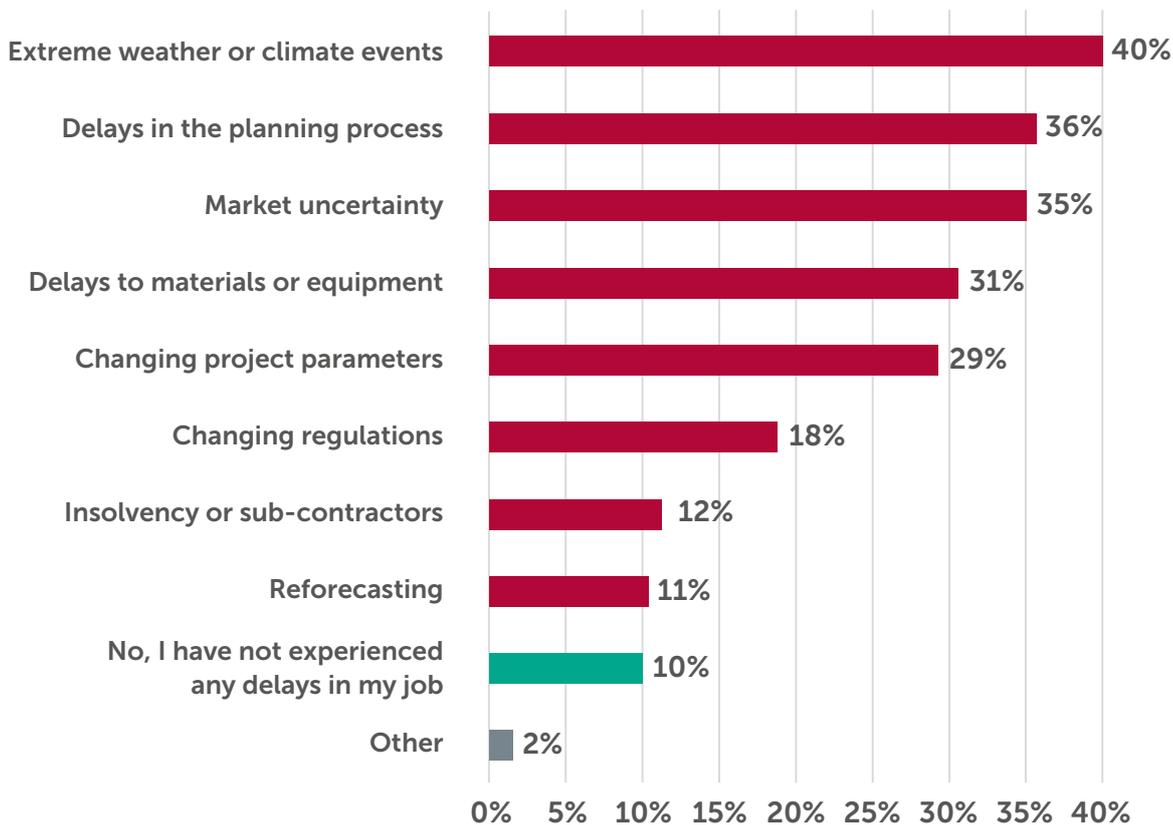
Job delays



In H2 2025, the most common causes of job delays were extreme weather or climate events (40%), which was a new answer option introduced in this wave, delays in the planning process (36%), and market uncertainty (35%). Other contributing factors included delays to materials or equipment (31%), and changing project parameters (29%). One in ten respondents (10%) reported experiencing no delays in their jobs, which has fallen from 19% in H1 2025.

In H1 2025, changing project parameters was the second most common cause of job delays, with 36% reporting this, but in H2 2025, fewer respondents (29%) are reporting this being an issue. Reforecasting also fell in H2 2025, with only 11% (vs 18%) of respondents attributing this as the cause of their delays. However, market uncertainty has moved to now be the third most common cause of job delays, with 35% of respondents reporting this compared to 30% in H1 2025.

Causes of delays in jobs

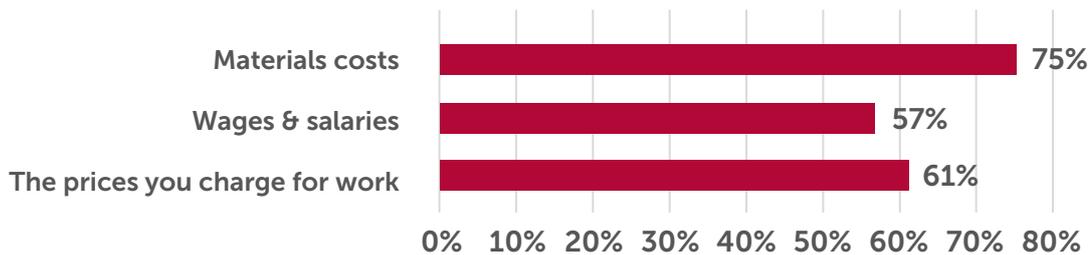


Graph 9 – Q22. Have you experienced any delays in your jobs from July to December 2025 (Q3 and Q4)? If so, what was the primary reason for the delay? BASE: All respondents (n=493)



In July to December 2025, most respondents continued to face cost pressures, with all three categories (material costs, wages & salaries, and the prices you charge for work) having a net balance over +50%, however, there have not been any increases in net balance. Three in four respondents (+75%) reported an increase in material costs, which was the same proportion as H1 2025. Similarly, +61% of respondents said they increased the prices they charged for their work, which was the same as last wave, but fewer respondents reported an increase in wages and salaries (+57% in H2 2025 vs +67% in H1 2025).

Past quarter costs July to December 2025



Graph 10 - Q11. How have both the prices that you charge for work, and your outgoing costs changed over the period of July to December (Q3 and Q4)? Base: The prices you charge for work, (n=489) Wages & salaries (n=491); Materials costs (n=490) Excl 'don't know'. Graph shows net balance of change



The impact of changes in prices and costs



In H2 2025, respondents whose businesses were affected by rising outgoing costs, specifically wages, salaries, and material costs, reported a range of impacts. Just under three in five (56%) said that these increased costs led to higher prices charged for work, and the same proportion of respondents reported this in H1 2025. Half (51%) reported lower-than-expected profits or business losses which rose from 49% in the previous half of 2025. Like the last wave, just over one third (34%) said their plans to recruit new staff had been restricted. One in five (20%) reported that the viability of their business had been affected or that their business was at risk of closure, which is down from one in four (25%) in H1 2025. Additionally, just under one in five (16%) indicated that staff redundancies or contract terminations had occurred because of changing prices and outgoing costs.



Impact of increase in outgoing costs (materials and/or wages)



Graph 11 - Q11a. You said that your outgoing costs (wages & salaries and/or material costs) have increased over the period of July to December 2025 (Q3 and Q4). How, if at all, has this impacted your company? Base: Those who have experienced an increase in outgoing costs (n=431)

Contracting companies



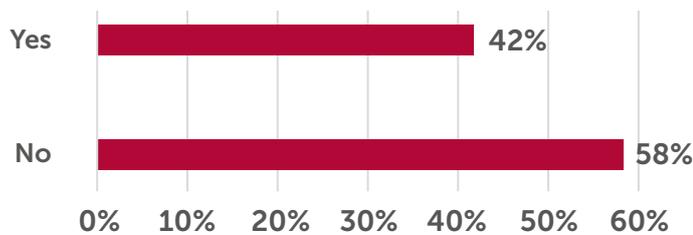
In H2 2025, the proportion of respondents who changed contractors has increased. Over two in five respondents (42%) reported changing contractors within their business, compared to 36% in H1 2025. The majority (58%) indicated they had not made any changes to their contractor arrangements during this period.

In H2 2025, among respondents who had changed their contracting companies, just under half (49%) reported that heightened competitive pressure

was the primary reason for this. Improved cost effectiveness was a factor for 47%, lower than H1 2025, where 53% said this was their primary motivation. Further behind, 39% of respondents pointed to a lack of performance from previous contractors (44% in H1 2025).

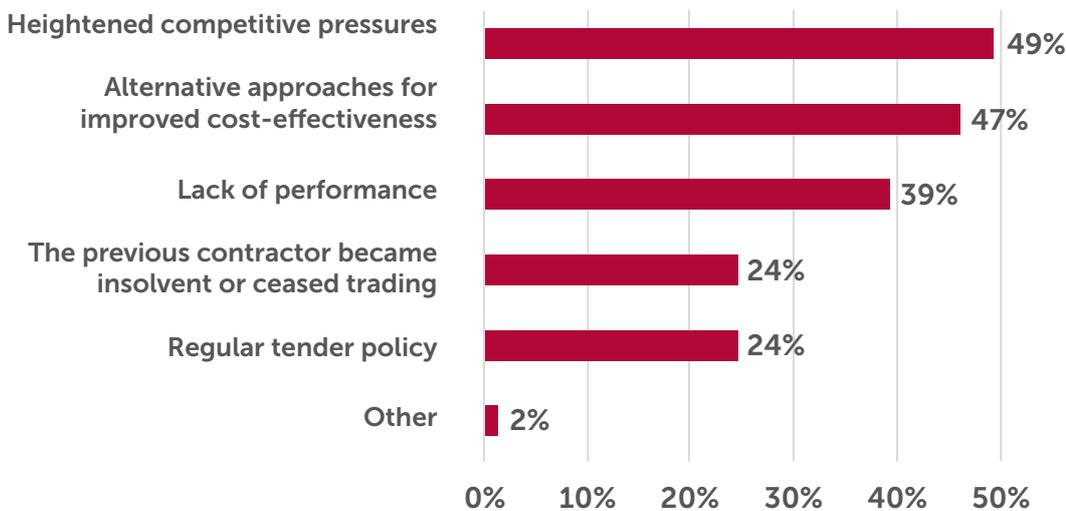
Additionally, 24% reported making changes because their previous contractor became insolvent or ceased trading. Similarly, 24% opted to switch as a result of a regular tender policy.

Have you changed any of the contracting companies that your business uses previously?



Graph 12 – Q20. Have you changed any of the contracting companies that your business uses previously? BASE: All respondents (n=493)

What was the primary motivation for contracting companies that your business used previously?



Graph 13 – Q21. What was the primary motivation for contracting companies that your business used previously? BASE: Those who have changed their contracting companies (n=205)

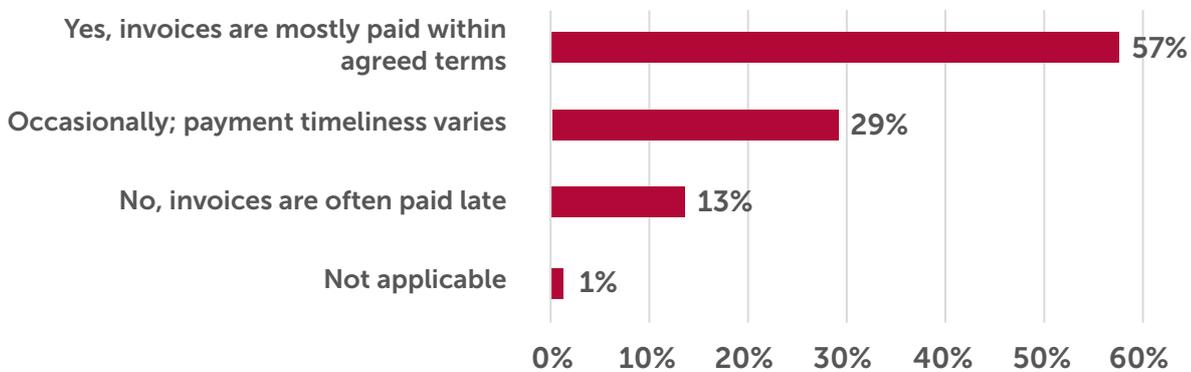
Invoice payment



In H2 2025, over half (57%) reported that their invoices were paid within the agreed terms. About one in three (29%) experienced payments on a varied timeline, while just over one in ten (13%) indicated that their invoices are often paid late.

Whilst it is concerning that there is a 3 percentage point increase in the number of respondents who indicated their invoices are often paid late, the UK Government has taken action to tackle late payments in sectors like construction. In July 2025, the UK Government launched a formal consultation on tackling poor payment practices, a formal response has now been issued and can be found [here](#).

Invoice payment



Graph 14 – Q24. Between July and December 2025 (Q3 and Q4), have the invoices owed to your business generally been paid within the agreed terms (i.e., within 30 days of issue)? BASE: All respondents (n=493)



Key indicators in the home nations



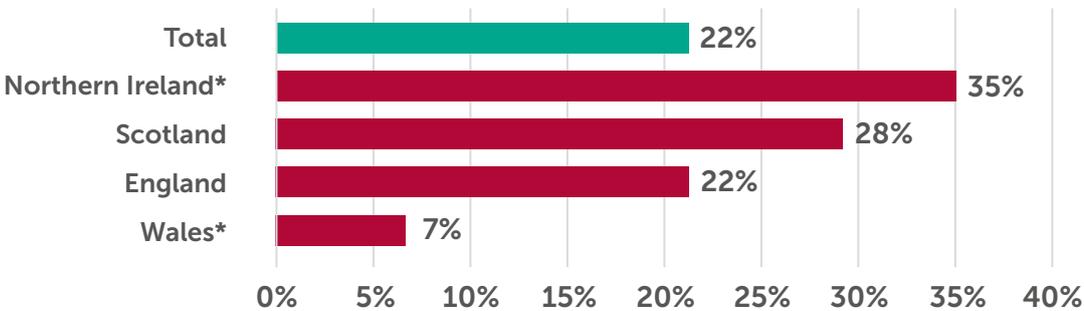
In H2 2025, the overall workload across the UK increased, but had a lower net increase of +22% than the first half of 2025 (+25%). All nations reported positive workload growth: Northern Ireland* led with a +35% net increase, followed by Scotland at +28%, England at +22%, and Wales* at +7%. England (+22% in H2 2025 vs +21% in H1 2025) and Northern Ireland* (+35% in H2 2025 vs +36% in H1 2025) remained stable, whilst Scotland and Wales* experienced declines in net change in workload- Scotland by 2 percentage points (+28% in H2 2025 vs +30% in H1 2025), but Wales* fell by 17 percentage points (+7% in H2 2025 vs +24% in H1 2025).

Enquiries also increased nationwide, but, as with workloads, saw a lower net increase of +19% (vs +34% in H1 2025). England had the highest net increase in enquiries at +19%, followed by Scotland with +16%, Wales* with +14%, and Northern Ireland* with +12%. All home nations, apart from England, saw their net change in enquiries fall in H2 2025. Northern Ireland* fell by 52 percentage

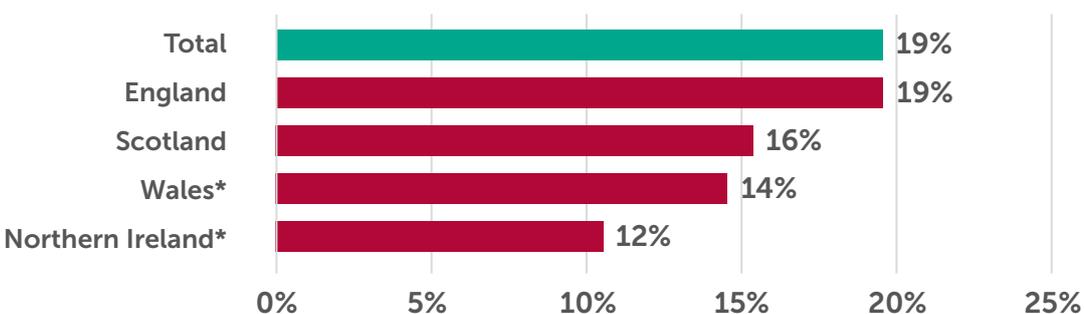
points (+64% in H1 2025 to +12% in H2 2025), Scotland fell by 40 percentage points (+56% in H1 2025 to +16% in H2 2025), and Wales* by 36 percentage points (+50% in H1 2025 to +14% in H2 2025). These decreases are significant; however they should be looked at with caution as the base sizes for Northern Ireland, and Scotland are less this wave than they were previously in H1 2025. As well as this, both Northern Ireland and Wales have base sizes below 30, so this should be taken into consideration. The net increase for England was by 1 percentage point from +18% in H1 2025 to +19% in H2 2025.

H2 2025 saw workloads remain steady for most, but enquiries fell significantly for most home nations. England remained consistent with levels reported in the first half of 2025 for both workload and enquiries, however Wales saw the opposite, with big declines for net increases in workload and enquiries. All home nations reported net increases in H2 2025, which is a positive.

National total workload



National total enquiries



Graphs 15 and 16 -. Q3/Q6. Base: England (n=416); Wales (n=28*); Scotland (n=32), Northern Ireland (n=17*)

*Caution: Results should be interpreted with caution due to limited base size. Graphs show net balance of change.

Key Indicators in the English Regions



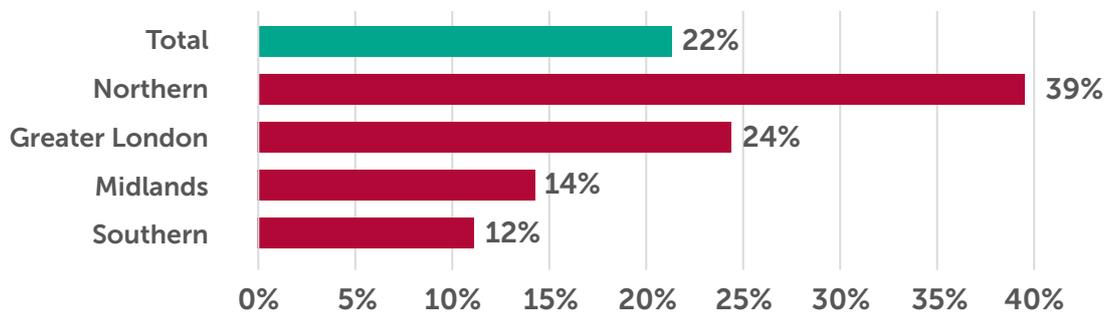
In H2 2025, the overall workload recorded a net increase of +22%, a slight decrease from +25% in H1 2025. Looking in greater detail at the English regions, the Northern region once again recorded the highest net increase, jumping from +36% in H1 2025 to +38% H2 2025. Greater London followed with a net increase of +24%, however saw this fall from +29% in the first half of 2025. The Midlands reported a net increase of +14%, falling from +22% in the first half of 2025. Similarly, the Southern region recorded a positive net increase +13%, but also falling compared to the first half of 2025, from +21%.

Total enquiries also recorded a positive net balance, but this declines from +34% in the first half of 2025 to +19% this wave. From a regional perspective,

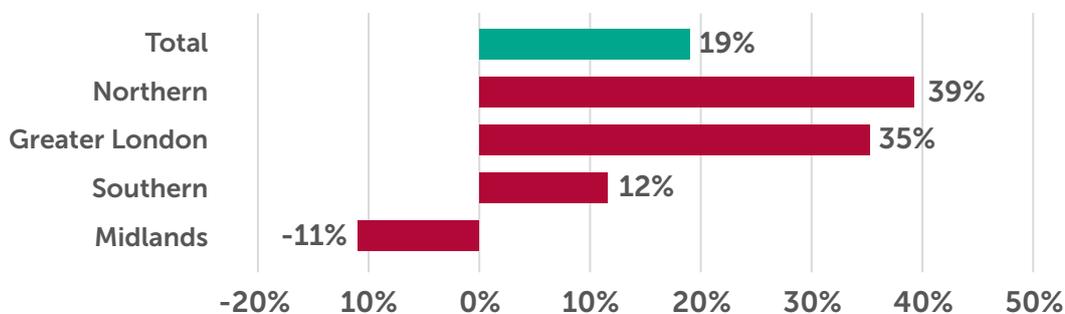
the North and Greater London stood out, with net enquiries of +39% for the North and +35% for Greater London, with Greater London seeing this rise from +15% in the first half of 2025. However, the net balance of enquiries for the North fell significantly from +64% in H1 2025. The South saw enquiries remain similar to the first half of 2025, recording a net balance of +12% (vs +14% in H1 2025), but the Midlands fell into a negative net balance in H2 2025 (-11%), from +25% in H1 2025 which is a significant decline.

Compared to the persistent declines throughout 2024, these figures signal a robust regional recovery in both workload and incoming enquiries for most regions in the first half of 2025, with the Northern region in lead.

Regional total workload



Regional enquiries



Graphs 17 and 18 - Q3/Q6. Base: Northern (n=111); Midlands (n=85); Southern (n=134); Greater London (n=86). Graphs show net balance of change.



Outlook for businesses in Q1 and Q2 (H1) 2026



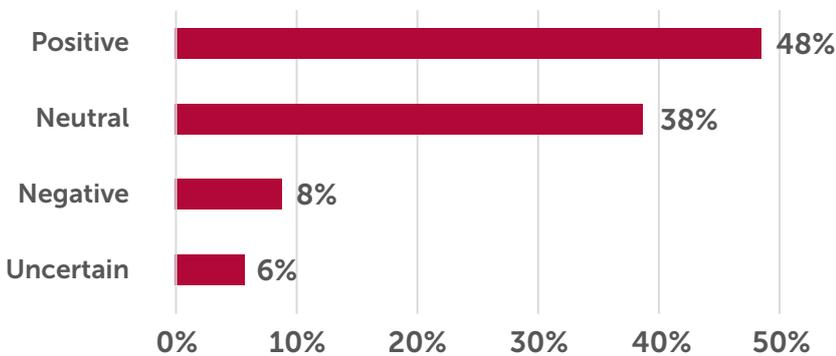
Just under half of respondents (48%) have a positive outlook for H1 2026. Almost two in five respondents (38%) hold a neutral perspective, while only 8% report a negative outlook for the H1 2026.

In this wave of the survey, a new question was introduced where respondents were asked to indicate whether they felt recent changes made across the built environment sector would have a positive, negative, or neutral impact on the construction industry going into 2026. Nearly half of respondents expect negative impacts from changes to National Insurance (NI) contributions (47%) and the Chancellor's recent budget (46%). The relaxation of Biodiversity Net Gain (BNG) requirements on small sites has the highest perceived positive impact (32%) but also the highest uncertainty (17%). Uncertainty remains notable

across environmental delivery plans (13%) and NPPF changes (16%), indicating ambiguity is common for most policy changes.

When going into more detail on changes specific to the NPPF, a similar proportion of respondents think that the impacts of changes to the application of the Building Safety Levy and the introduction of a new 'medium size' category will be positive, with over a third saying this for both changes (36% and 37% respectively). However a higher proportion of respondents reported that they think the impact of changes to the application of the Building Safety Levy on the construction industry will be negative (20%), than those who think this about the introduction of a new 'medium size' category (8%).

Outlook for the business in Q1 and Q2 (H1) 2026



Graph 19 – Q23. What is the outlook for your business going into the next two quarters (Q1 and Q2)? BASE: All respondents (n=493)



What do you think the impact of the following changes will have on the construction industry?

The most recent Chancellor's Budget (Autumn Budget 2025)



Changes in National Insurance Contributions



Relaxation of Biodiversity Net Gain (BNG) requirement on small sites, allowing payment for an offset



Environmental Delivery Plans



Changes to the National Planning Policy Framework (NPPF)



■ Positive ■ Neutral ■ Negative ■ Uncertain / Don't know

Graph 20- Q23bNEW. What do you think the following changes will have on the construction industry? Base: All respondents (n= 493)

What impact do you think the following NPPF changes will have on the construction industry?

Changes to the application of the Building Safety Levy



Introduction of a new 'medium size' category (10-49 homes)



■ Positive ■ Neutral ■ Negative ■ Uncertain / Don't know

Graph 21- Q23cNEW. What impact do you think the following NPPF specific changes will have on the construction industry? Base: All respondents, excluding those who are uncertain on the impact of changes to the NPPF on the construction industry (n= 414)

For more information

This survey was issued between 26th January and 20th February 2026 and received 493 completed responses. It was published in March 2026.

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