

REPORT

COVID-19: GLOBAL SURVEY

THE IMPACT ON THE CONSTRUCTION SECTOR ACROSS THE WORLD

OCTOBER 2020 - ISSUE 6

RLB

Rider
Levett
Bucknall

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INTRODUCTION

This latest edition of our global survey provides a bi-monthly snapshot of the continued development of the COVID-19 pandemic and its effects on the built environment around the globe.

This issue features responses from 45 RLB offices from 22 countries on 5 October 2020, providing current views on a series of structured questions designed to elicit detailed and comparable responses to show the differing and evolving impact of the pandemic.

Moreover, as successive waves of the virus are now seeming to break in regions at different times, the period of time between surveys will enable a more all-encompassing assessment of the consequences, rather than simply a point-in-time picture.

At the macro level, there will be a focus on the question of how to deal with the huge debt-burden that has arisen in almost every economy, as well as how to deal with globally record high levels of failed businesses and unemployment, while trying to re-establish growth in a business and workplace environment that may well have changed forever.

Construction is traditionally seen as a major economic bellwether in understanding economies' growth prospects, and that position may become even more central as governments seek ways to re-enliven their commercial entities.

Methodology: Colleagues from around the world were asked a series of questions, and their responses were ranked, so that comparisons could be made. The aim was to produce numerical and visual analysis of their views, reflecting their current position regarding the COVID-19 outbreak. One survey response per city was collected, completed by a senior colleague, who adopted an industry-wide local appreciation of marketplace effects.

Surveys 1 to 5 were produced monthly. Survey 6 onwards will be produced in two-month intervals to allow time to digest the changes that are taking place and to be more proactive in commenting on possible outcomes.

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HIGHLIGHTS



Relaxation of lockdown
44%
of respondents claim a return to normal or lockdown being significantly reduced.

Lost productivity 

Over **82%** respondents claim the fall of productivity is less than **20%**.

Tender enquiries 

Almost **80%** of our respondents reported less than **30%** drop-off of enquiries.

Consistent best performing sectors



Data centres



Healthcare




Infrastructure



Industrial & Logistics

Government response **Almost 50%**

of respondents considered the actions of their respective governments to have achieved little.

Least affected cities sectorally by **continent**

- WAIKOLOA
- BEIJING
- BRUSSELS
- CAPE TOWN
- WELLINGTON

AMERICAS

CHINA & NORTH ASIA

EUROPE & UK

MIDDLE EAST & AFRICA

OCEANIA & SOUTH ASIA

- CHICAGO
- SEOUL
- MILAN
- DURBAN
- MELBOURNE

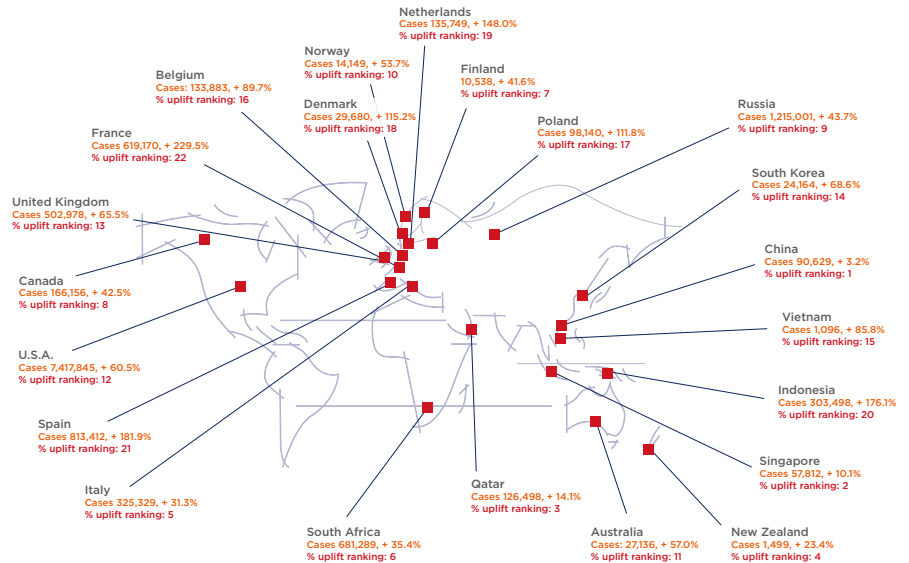
Most affected cities sectorally by **continent**

GLOBAL SURVEY

The map of the world shown here shows the countries with RLB offices that have contributed to Issue 6 of the survey. We have represented in orange the number of COVID-19 cases confirmed in each country as at 5 October 2020, and a percentage increase from the number of cases confirmed as at 3 August 2020.

This edition sees the least uplift once again being recorded in China, at +3.2%, followed by Singapore at +10.1% and Qatar at +14.1%. France has recorded almost +230% for the period, and Spain almost +182%.

This analysis represents very high figures for cases uplift, indicating a new wave of the virus sweeping through some countries that had looked to be faring well until recently.



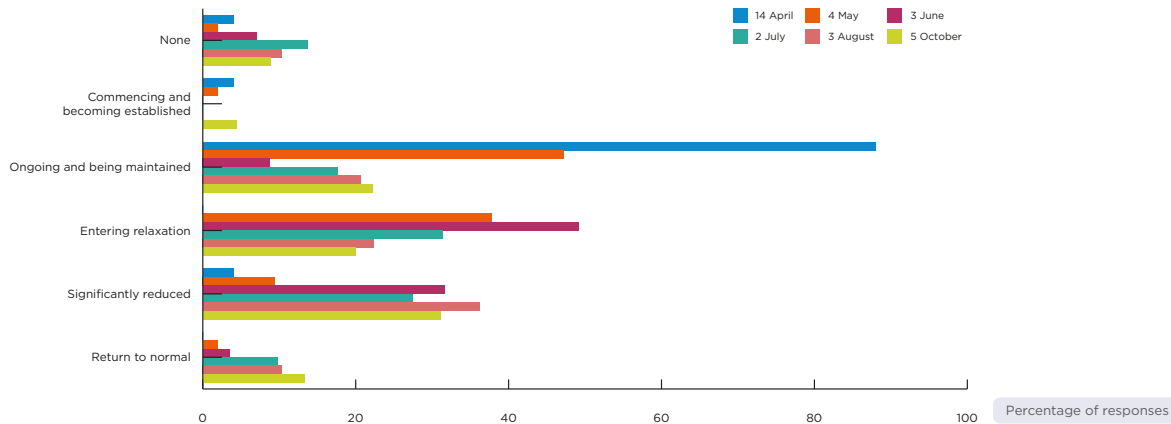
Source: RLB R&D, derived from: Hale, Thomas, Sam Webster, Anna Petherick, Toby Phillips, and Beatriz Kira (2020). Oxford COVID-19 Government Response Tracker, Blavatnik School of Government.

ANALYSIS

1. WHAT IS THE CURRENT STATE OF SOCIAL LOCKDOWN IN YOUR LOCATION DUE TO COVID-19?

This latest edition of the survey shows a similar distribution of responses to lockdown status as recently seen, including some locations reporting ongoing measures.

Overall, the message appears to be one of continuation of constraints rather than release, as the second, and even third, waves of COVID-19 sweep through regions across the globe.

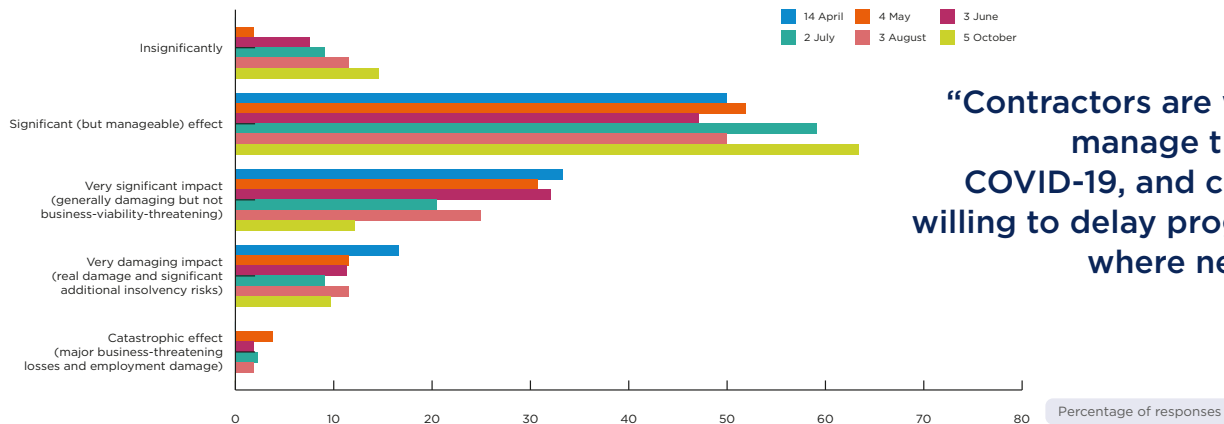


2. HOW SIGNIFICANTLY HAS THE LOCKDOWN AFFECTED NORMAL CONSTRUCTION ACTIVITY?

The major change in this survey is the consolidation of responses recording significant but manageable effects. Almost two thirds of respondents selected this statement as best depicting the situation in their local market, which suggests an acceptance and understanding of the impacts on the industry. As a result, the more extreme views of the seriousness of the impact on the construction industry have

reduced in number from our last survey.

Views we received in relation to the lockdown effects across various countries echoed a common theme. “Construction continues as normal, with procedures in place. Looks like contractors are starting to figure out how to manage the projects, given the current situation” was the input from our respondent in Washington DC, **USA** and “some projects have slowed on site but mostly continuing, lots of projects in planning phase” from Canberra, **Australia** were both typical of comments received across regions.



“Contractors are willing to manage the risk of COVID-19, and clients are willing to delay programmes where necessary”

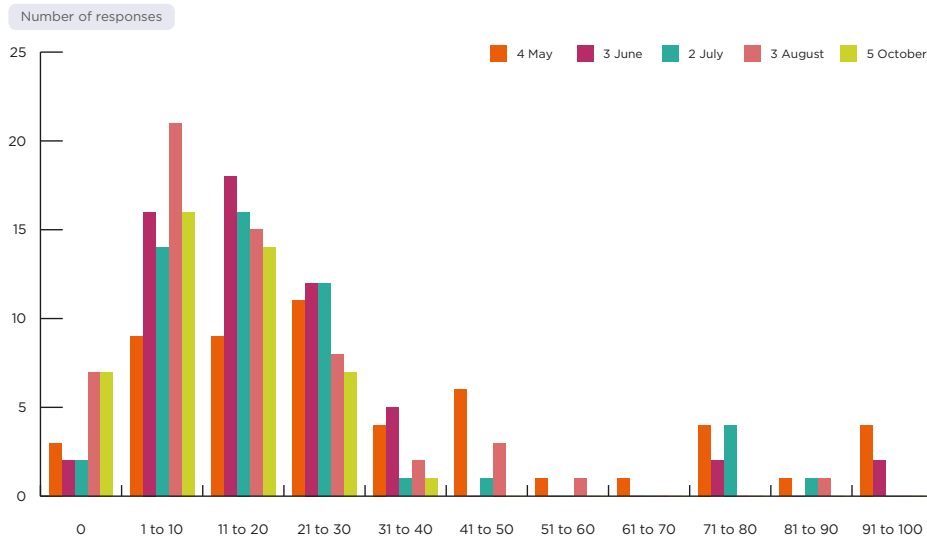
London, UK

3. WHAT IS THE ESTIMATED PERCENTAGE FALL IN PRODUCTIVITY OF ON-SITE CONSTRUCTION OPERATIONS?

The concentration of views on lost productivity lies in the brackets of up to 20%. Leaving to one side the seven respondents that suggested they were seeing no productivity

loss, two thirds of respondents reported that losses were not in excess of 20%.

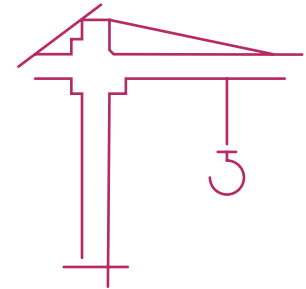
This is broadly in line with the responses collated in August and suggests ongoing consistency of understanding of the negative effects on on-site activities.



Within survey issues 2 to 6 we asked a question on productivity to gain a better understanding of how COVID-19 has affected on-site construction operations.

3. WHAT IS THE ESTIMATED PERCENTAGE FALL IN PRODUCTIVITY OF ON-SITE CONSTRUCTION OPERATIONS?

There was a mix of comments shared about the causes of any fall in productivity. Some of our respondents indicated that ensuring safety measures were implemented was having an impact, whereas some suggested that the delay of materials and components from countries under lockdown was reducing productivity. Others, such as in San Francisco, **USA** commented that “labour shortages continue to be an issue, as does financing.” In Durban, **South Africa**, they responded that they “were back to normal working hours and production.”

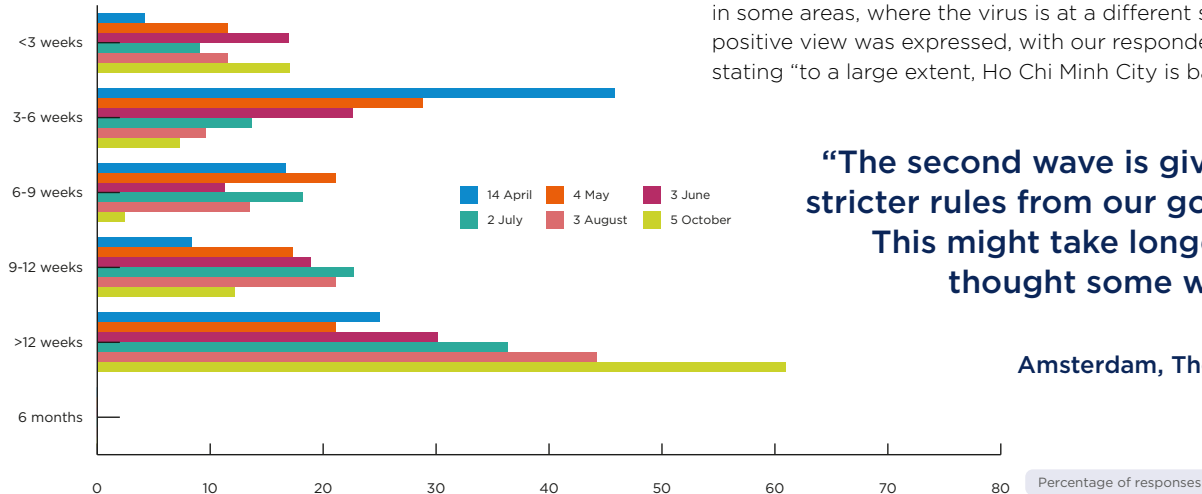


“People have become used to the new normal and are able to change to cope with the measures to contain the virus imposed by Macau SAR”

Macau, China

4. FROM THIS POINT, HOW LONG DO YOU FORECAST FOR LOCKDOWN TO BE COMPLETELY REMOVED?

The major change here from our previous survey is the fact that now over 60% of our respondents suggest that removal of lockdown constraints is more than three months away.



This would seem to indicate a growing acceptance that there is a long process underway, which may carry on into the new year as we begin to see the impact of the second and third waves of the virus.

A number of respondents shared the view that with cases of the virus on the rise in their regions, more restrictions were being brought back in. Our office in Milan, **Italy**, commented “I would expect these restrictions to remain in place until there are no (or at least, very few) new daily cases.” However, in some areas, where the virus is at a different stage, a more positive view was expressed, with our respondent in **Vietnam** stating “to a large extent, Ho Chi Minh City is back to normal.”

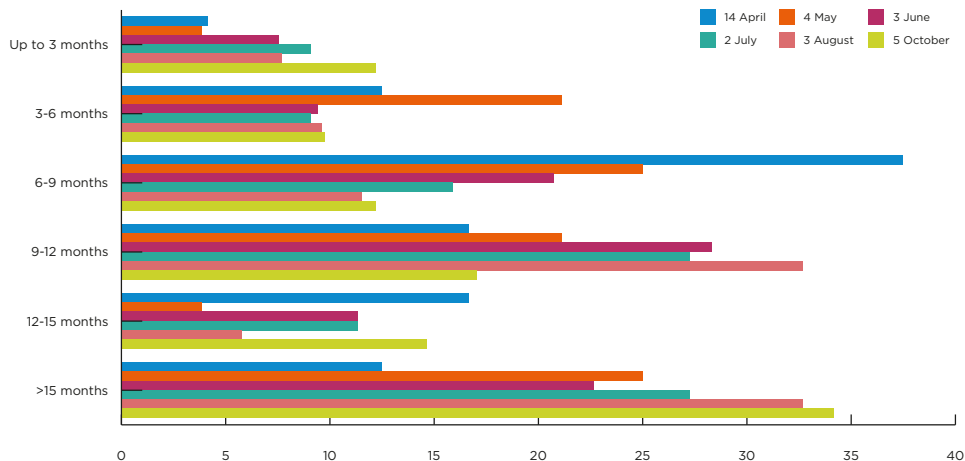
“The second wave is giving rise to stricter rules from our government. This might take longer than we thought some weeks ago”

Amsterdam, The Netherlands

5. AFTER RELAXATION OF LOCKDOWN, WHAT IS THE ESTIMATE OF RECOVERY TIME FOR YOUR LOCAL MARKET?

Views as to the recovery period for construction markets are now hardening toward periods exceeding 12 months. Almost 50% of respondents globally now view a recovery taking in excess of 12 months, and over one third see the recovery taking more than 15 months.

Responses from across the regions generally reflected a longer-term recovery period. However, some respondents indicated that recovery by sectors varied with “some bouncing back in ‘V-shaped’ recovery”. Our respondent from Birmingham, **UK** stated that “we are suffering a long and sustained impact”. The view from Auckland, **New Zealand**, that “the impacts on the global market will affect the NZ market for some time” also typified comments reflecting the long-term recovery expectations.

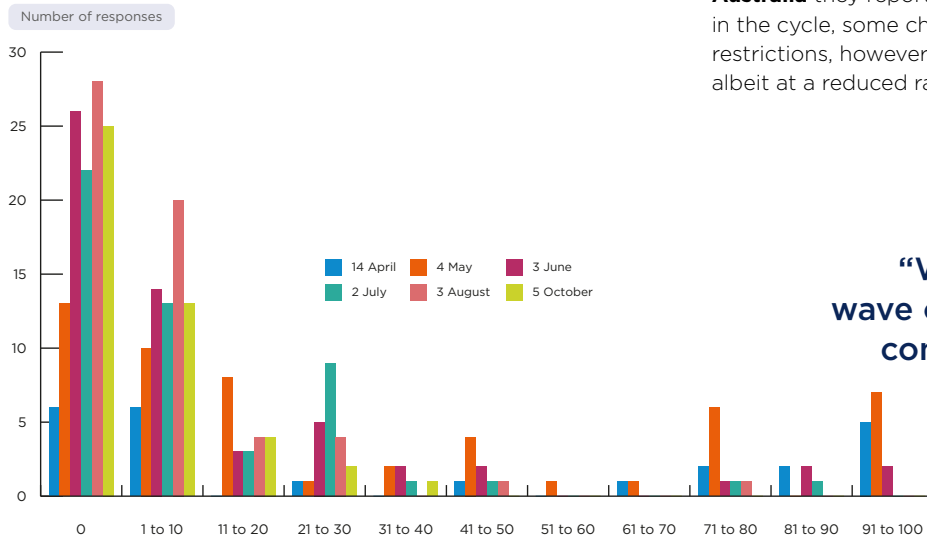


“Recovery will be based on a COVID-19 vaccine and any infrastructure stimulus funding”

Tucson, USA

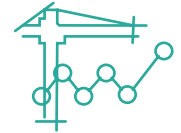
6. WHAT PERCENTAGE OF CONSTRUCTION SITES ARE CURRENTLY CLOSED?

Over half of our respondents now report no site closures, with none reporting more than 40% of sites being closed. The higher levels of closed sites seem to be reflective of site works having been deferred rather than sites having been closed by



lockdown, or intermittent site closures as a result of positive tests having been received.

Views expressed across many regions reflected that construction activity is seen as crucial. For example, our office in Portland, **USA** commented “construction has always been deemed an essential service in Oregon so projects have not been halted due to public health concerns” and in Melbourne, **Australia** they reported that “depending on where sites were in the cycle, some chose to shut down completely given restrictions, however most maintained a presence on site albeit at a reduced rate of productivity.”



“While there has been a third wave of infection since early July, construction sites have largely been operating normally”

Hong Kong, China

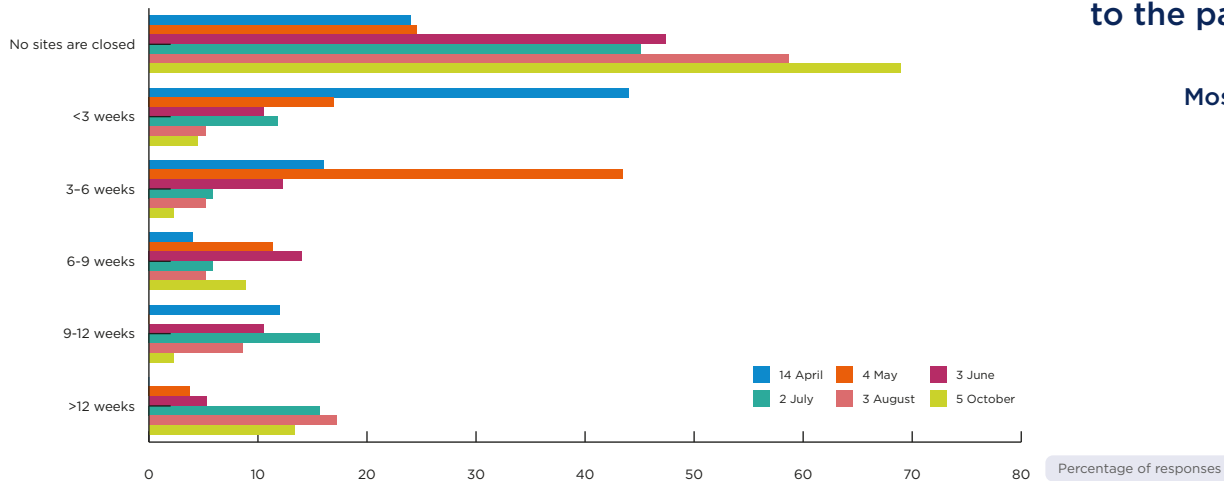
7. ON AVERAGE, FOR SITES THAT ARE CURRENTLY CLOSED, HOW LONG HAVE THEY BEEN CLOSED?

Although overall almost 70% of locations' construction sites appear now to be open, only 55% of our respondents reported all sites to be open in their respective locations. The 15% gap, indicates that these respondents reported that a very small number of sites remain closed.



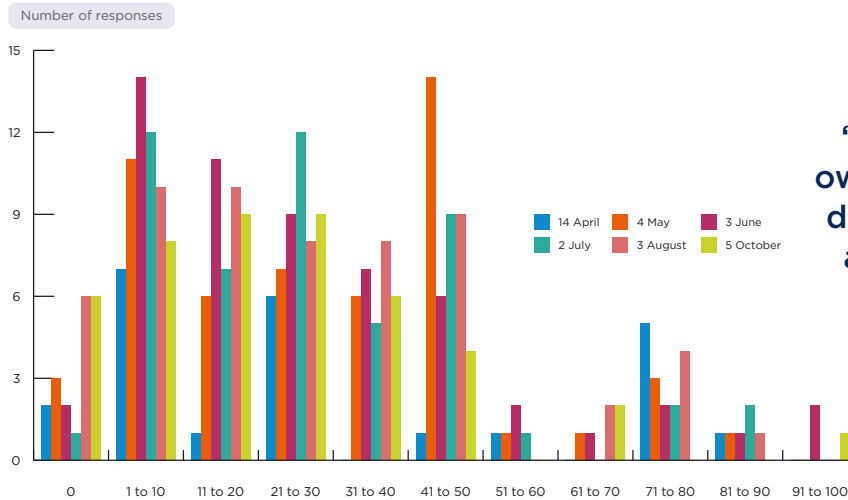
“Long-term closures relate to sites that had a problem with project finance prior to the pandemic”

Moscow, Russia



8. WHAT PERCENTAGE OF PROJECTS (BY NUMBER) HAS BEEN PUT ON HOLD AT PRE-CONSTRUCTION STAGE?

There is now a fairly clear balanced weight of distribution centred around 10-30%, which represents a movement towards fewer numbers of projects on hold than shown in the last survey.



Not surprisingly, commentary from the regions differs significantly dependent on the impact the pandemic has had on their country and how far lockdown restrictions have affected their economy. So, for example in London, **UK**, the feeling was optimistic; “there has been a number of commercial sector projects put on hold, but many are still progressing at pre-construction, as around 95% of the work can be done remotely.”



“Confidence levels from a client/owner/developer point of view are down. The government is pushing ahead though with their planned or on-going projects”

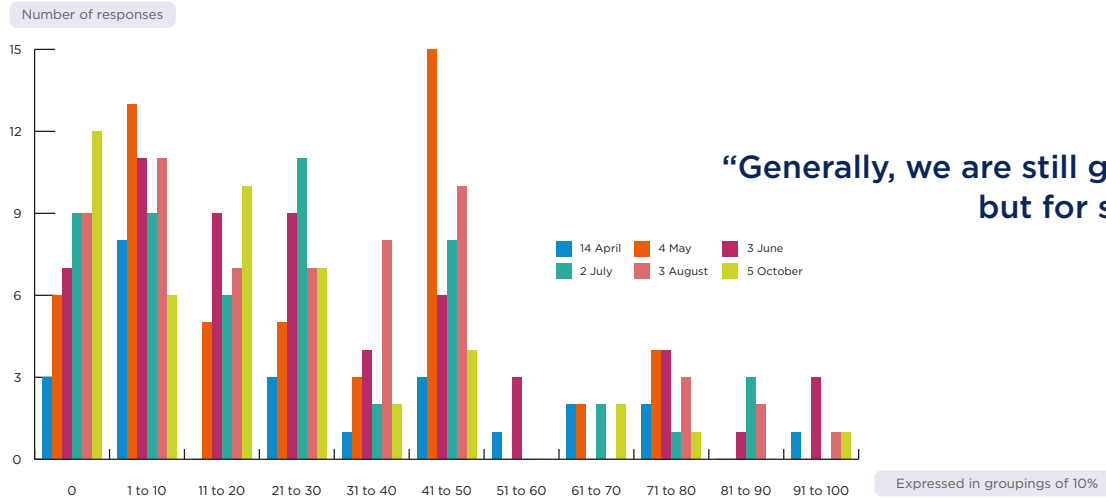
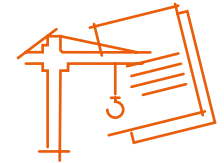
Melbourne, Australia

9. BY WHAT PERCENTAGE HAS THERE BEEN A DROP-OFF IN THE NUMBER OF TENDER ENQUIRIES?

Responses to this question produced a significantly more positive outcome than has been seen in previous surveys. Project enquiry drop-off is now focused on the lower levels, almost 80% being in bands less than 30%. This contrasts with less than 60% of responses being within these bands in the

last survey, and may depict a return to the market of a higher level of enquiries, or a reduction in drop-off.

Our respondents from Oslo, **Norway**, reported that “for the time being we are moderately affected,” but raised caution about how this might play out for Q4 of 2020. **Poland** also agreed that “everything is getting back to previous levels, with the exception of certain sectors including hotels and physical retail such as shopping centres.”



“Generally, we are still getting enquiries, but for smaller projects”

St Lucia

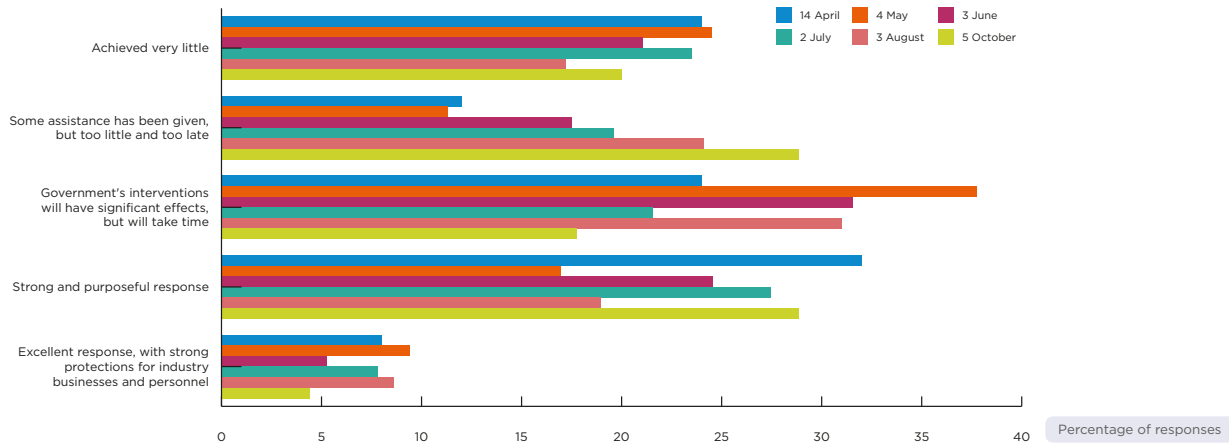
10. HOW HAS YOUR NATIONAL GOVERNMENT'S ACTIVITIES IN RELATION TO THE COVID-19 PANDEMIC AFFECTED THE CONSTRUCTION INDUSTRY?

There is a broad sweep of views as to the efficacy of governments' interventions.

Given the diversity of governmental political colours, such a

result is not surprising. It does indicate, however, not only the disparities in approach, but also the extent of respondents' views as to success of measures taken.

Overall, there does seem to be a consensus with over half of those responding agreeing that more could and should have been done by their government.

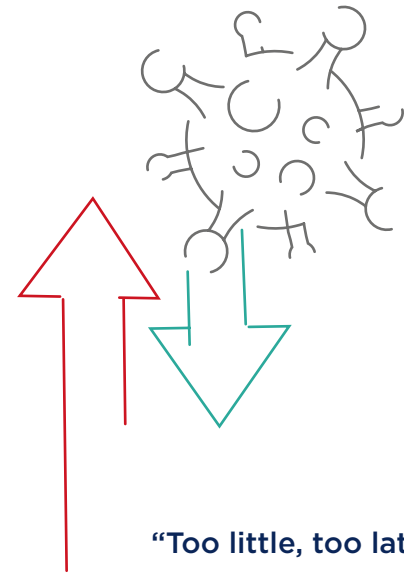


10. HOW HAS YOUR NATIONAL GOVERNMENT'S ACTIVITIES IN RELATION TO THE COVID-19 PANDEMIC AFFECTED THE CONSTRUCTION INDUSTRY?

Many of our respondents reported that the responsibility to apply for government support sat with the business owners initially. However, complicated administrative processes to qualify for subsidies meant it was difficult to obtain such support.

Many respondents reported that government intervention is slowing down as we move towards the end of the year.

Hong Kong quoted "with completion of the Employment Support Scheme in November, the government is expected not to introduce further measures to assist companies in general."



"Too little, too late"

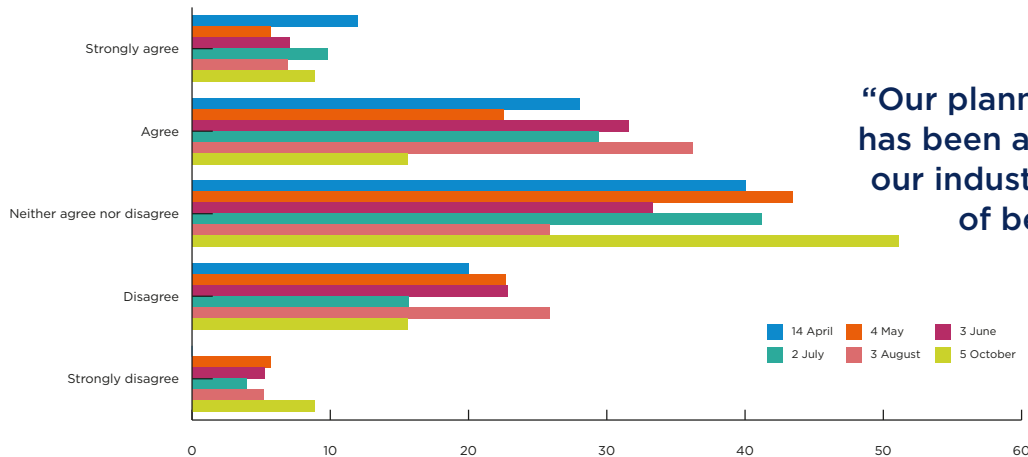
Moscow, Russia

11. WILL THE AFTERMATH OF THE PANDEMIC INCLUDE RELAXED PLANNING CONSTRAINTS AS A STIMULUS TO SPEEDY RESUMPTION OF ACTIVE DEVELOPMENT?

The majority of respondents felt that the pandemic wouldn't affect the planning process within their region but there were other factors at play that could help speed up active development, from presidential election promises to pledges on public spending on capital projects.

Waikoloa in **Hawaii** stated that “planning departments have extended timeframes for expiration of permits, however, the process takes the same length of time, or longer, to approve permits.”

The feedback from our respondent in Birmingham, **UK**, was that “a number of initiatives suggest that planning reform is on the cards. However, not all of these appear to relate directly to pandemic-targeted investment.”



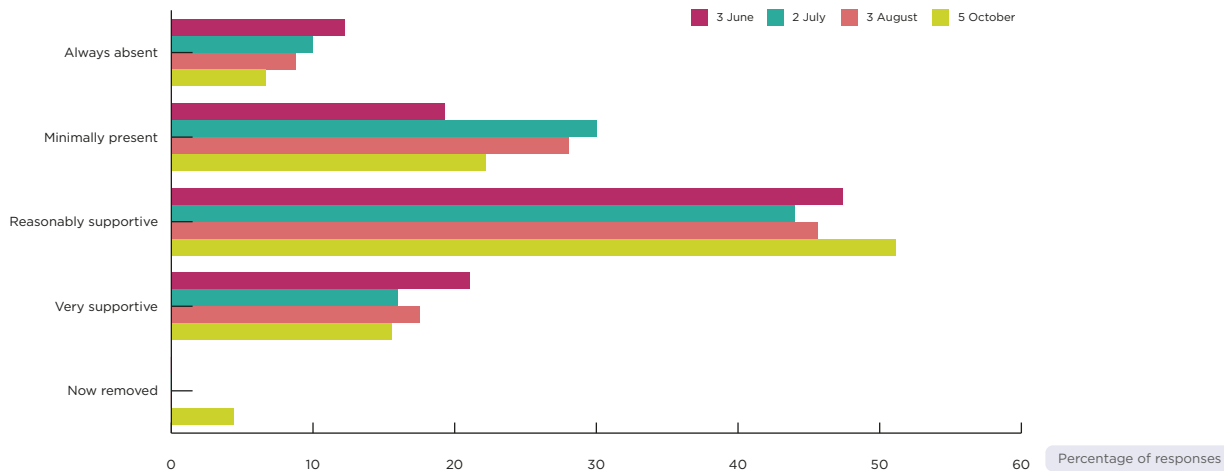
“Our planning approval process has been a recurring problem in our industry and shows no sign of being able to improve”

Cape Town, South Africa

12. WHAT HAS BEEN THE EXTENT OF GOVERNMENT SUPPORT TO LARGER COMPANIES?

In this latest survey, two thirds of locations around the world report government support to larger companies as being reasonable or very supportive. This continues to suggest ongoing support as the pandemic develops. However, almost a third of locations still report minimal, or no support.

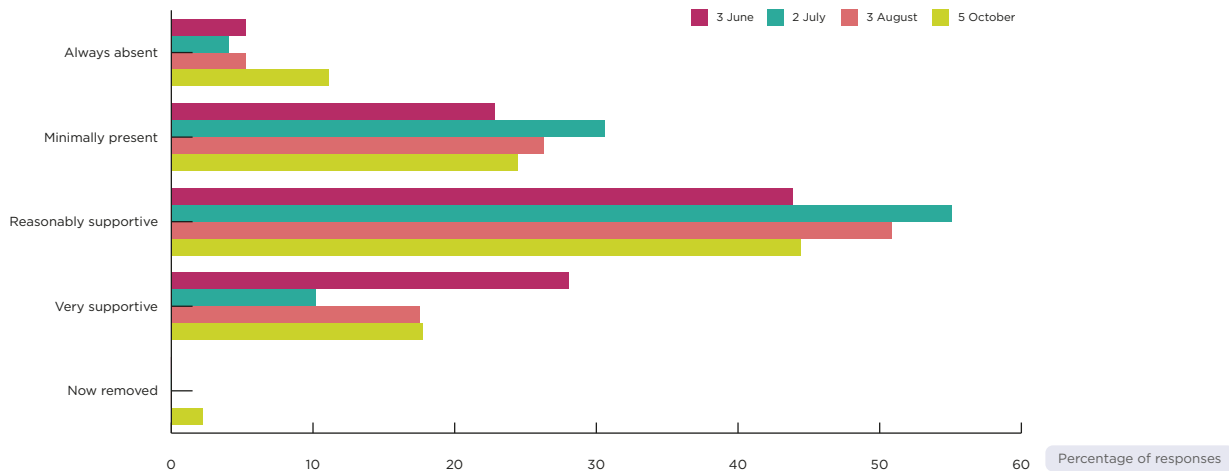
Surveys from July onwards include an update of responses to four questions regarding government support to different sizes of construction entities.



13. WHAT HAS BEEN THE EXTENT OF GOVERNMENT SUPPORT TO SMALL AND MEDIUM-SIZED ENTERPRISES (SMES)?

Our respondents' views around government intervention to small and medium sized enterprises remain consistent with earlier surveys, although with slight falls in the positive view that actions have been supportive.

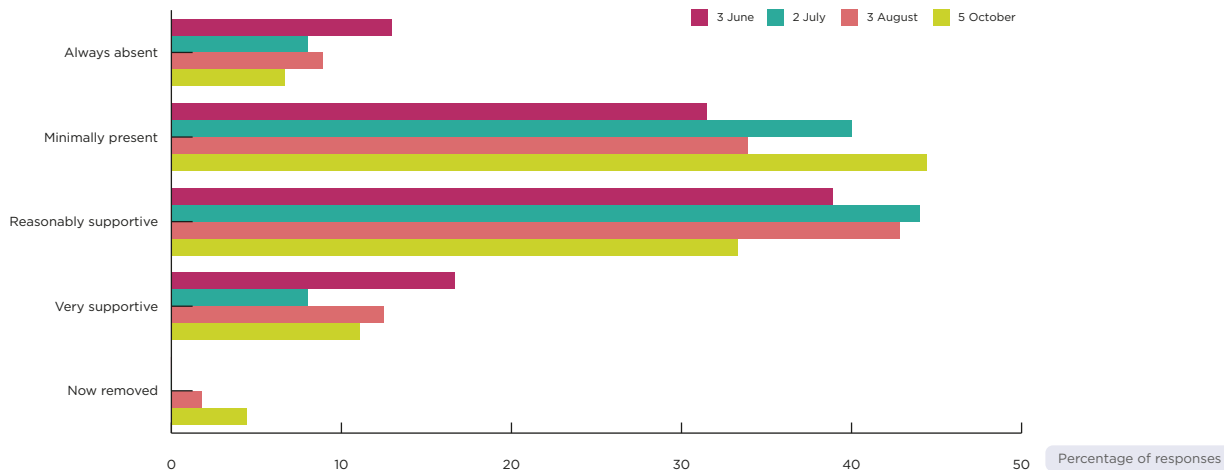
This may be due to a more developed understanding, as the pandemic continues, of the continued workplace and social constraints on the large number of smaller business entities.



14. WHAT HAS BEEN THE EXTENT OF GOVERNMENT SUPPORT TO SELF-EMPLOYED INDIVIDUALS?

More than half of all responses in respect of the self-employed now feature a belief that either no support is in place, or it is minimal. This is a significant increase on the 43% of the last survey in August, and records growing concern for the future.

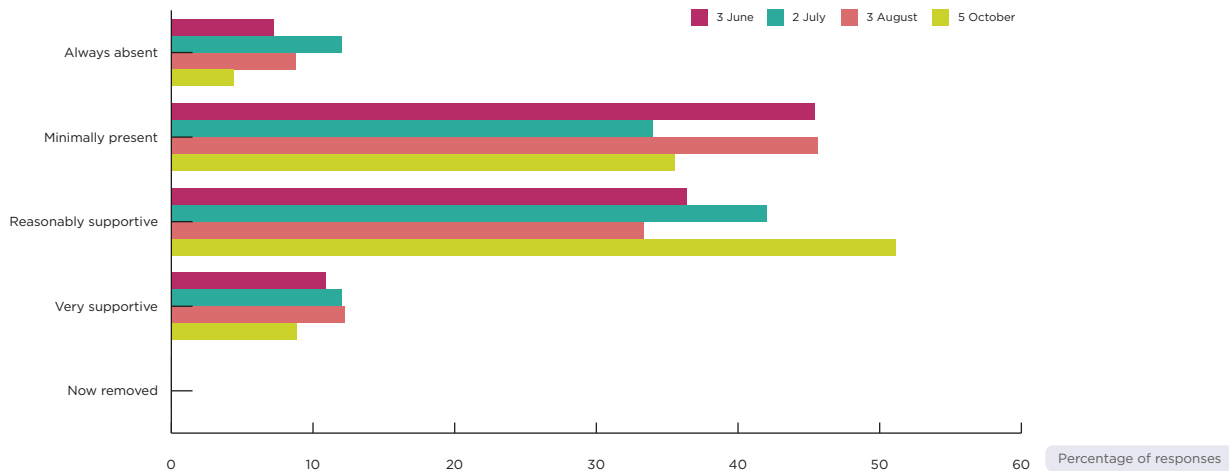
Balancing this, of course, is the reduction of views that support has been favourable, alongside a doubling of responses holding the view that any support that had been given has now been removed. The overview is that more could be done.



15. WHAT HAS BEEN THE EXTENT OF GOVERNMENT SUPPORT TO INDUSTRY SECTORS?

Our respondents are optimistic in relation to government support to industry sectors. 60% of views state being that of 'reasonable or better'. This is a very significant uplift of over 14%, which suggests that sector-targeted governmental response is showing favourable results.

Given that this support flows through to a broad swathe of the businesses in the industry, this form of approach may be more successful in the medium to longer-term than the immediate support package funding.



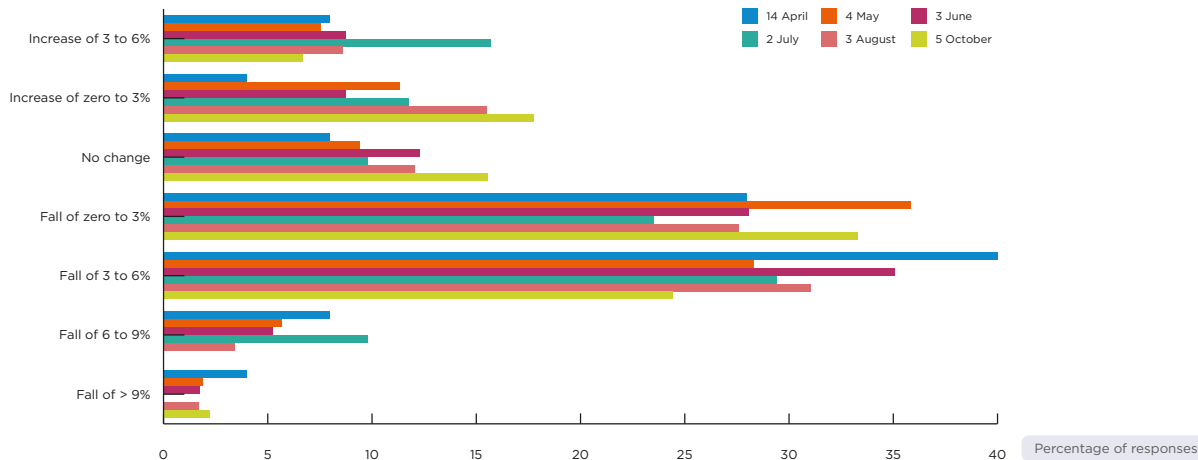
16. HOW WILL TENDER PRICES BE AFFECTED FOR THE OVERALL YEAR 2020?

Where previous surveys indicated many felt that the pandemic would dramatically affect tender prices, this survey is showing a consolidation of opinion of a less than 3% fall in relation to forecasts for 2020 made at the end of 2019.

From another angle, just over one quarter now believe that there will be a fall of greater than 3%, while another quarter foresee a rise of up to 3%.

Cape Town in **South Africa** commented, “of late contractor desperation has been offset by a smaller pool of capable contractors who have not materially dropped their prices, while supply of materials has become problematic three months after sites reopened suggesting the halt in manufacturing during lockdown is only showing now.”

And, in Washington DC in the **USA** they reported, “by the end of the year pricing will start to decrease, especially in relation to materials and labour components.”



SECTOR ANALYSIS

WHAT IS THE GENERAL EFFECT OF THE PANDEMIC ON CONSTRUCTION SECTORS?

Since Issue 5 in August, views have remained remarkably consistent in respect of performance of the various sectors. That position follows-on from our comments in Issue 5 to the effect that sectors' performance had become largely dependent upon direct sector impacts such as the hotel, hospitality & leisure sector, or knock-on effects arising due to, for example, increased demand in industrial & logistics sectors.

Although there are sectors such as health, which may be generally expected to benefit from additional spending to alleviate service shortfall in the short and medium term, the short to medium term prognosis for such as the education sector is a more complex bundle of issues. Positive sentiment exists in relation to governments' spending of public money to drive economies back to activity, but negative effects also exist in relation to impacts on universities' teaching and accommodation facilities. These competing facets exist in multiple sectors, making judgement calls extremely challenging, due to imperfect knowledge of how respective governments will act to solve their own very specific problems.

Methodology: The narrower single width entries reflect a respondent's view that a particular sector has been positively or negatively affected (value +1 or -1).



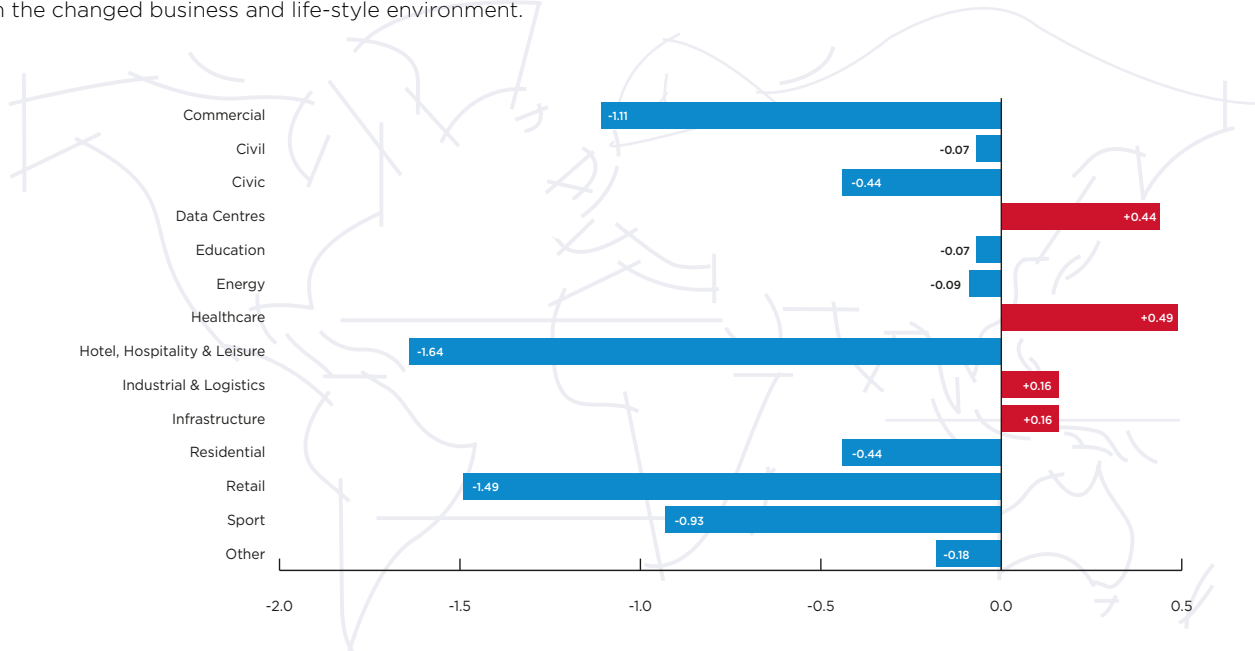
Double width bars indicate major positive or major negative effects in a particular sector (value +2 or -2).

Where a respondent indicated no effect on a sector, that sector has a bar with nil length (effectively does not exist).

GLOBAL ANALYSIS BY SECTOR

The worst-affected sectors are once again clearly commercial, hotel, hospitality & leisure, retail and sport.

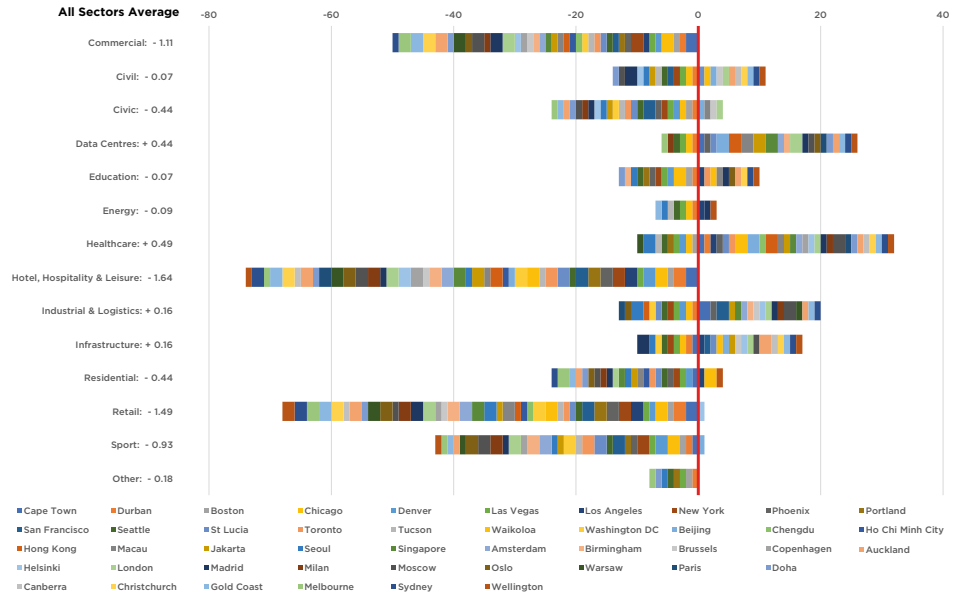
The few beneficiary sectors are still data centres, healthcare, industrial & logistics and infrastructure, all of which could benefit from the changed business and life-style environment.



CITY ANALYSIS BY SECTOR

The detail of the sectoral breakdown shows just how badly affected the worst-performing sectors are. Hotel, hospitality & leisure is the worst affected, by some way. However, that is not surprising as the industry has, in many locations, been almost completely locked down. The result has been drastic losses and uncertainty as to the future of this key sector, which depends on the mobility and discretionary spending capability of its patrons. As a follow-on consequence, construction in the sector has been paused in many cases and deferred in others.

At the other end of the spectrum, healthcare and data centres sectors are stand-out performers, closely followed by the industrial & logistics sectors.



SECTOR ANALYSIS BY CITY

The regional city-centric analysis of sectors, below, shows more clearly the impacts in the various regions of the specific sectors' positions. Checking each region's breakdown against the other regions reveals a level of consistency that suggests that cities around the globe are facing similar structural effects, and have to react to relatively common impacts on particular sectors. However, the exact mix and extent inevitably varies between cities, as it does between regions, giving rise to complex responses in each locale. Bearing in mind the fact that the cities in this survey represent only the most predominant in the respective countries surveyed, the countries' local sectoral challenges are magnified by the complexity of their own internal markets.



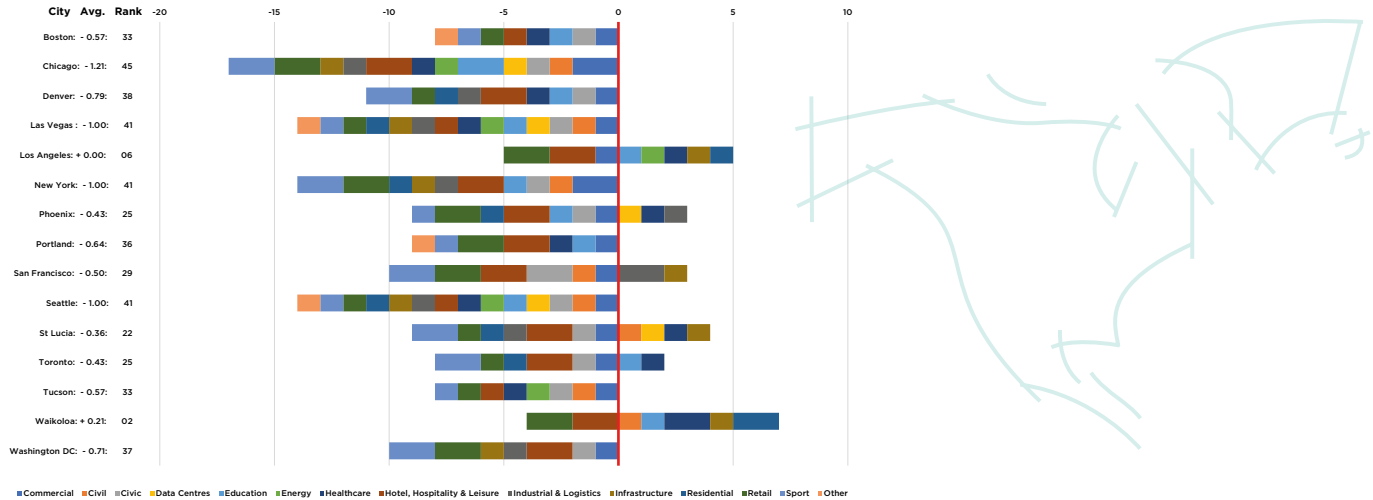
"There has been an injection of money into public, infrastructure and civil jobs as a form of fiscal policy, whereas private sectors (excluding data centres & logistics) have had to massively reassess their strategy - retail, sport and hospitality most notably"

London, UK

SECTOR ANALYSIS BY CITY (AMERICAS)

The adverse effects of COVID-19 on the market appears to have crystallised recently in Chicago, which now stands as the worst affected city in the USA. Las Vegas, New York and Seattle remain badly affected, but the real difference is the reporting of several of Chicago's market sectors suffering major negative impacts.

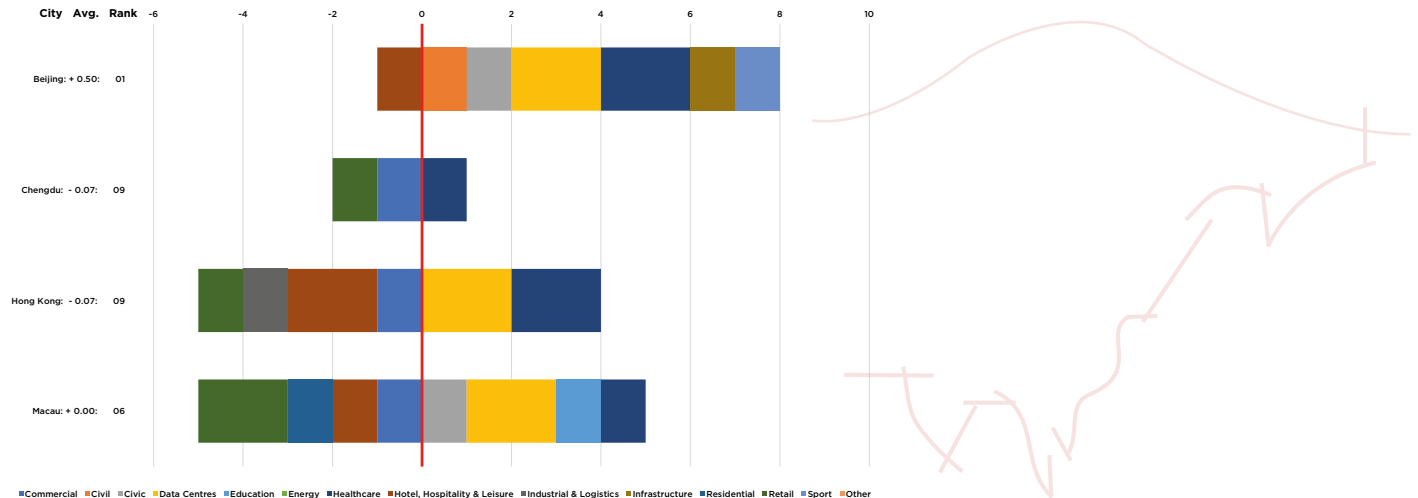
Waikoloa is now showing several positively affected sectors, so leads the way in the Americas, followed by Los Angeles, which reports balanced adverse and positive effects. In overview, most locations continue to report negative impacts across many sectors, with the best performing cities only barely displaying positive effects.



SECTOR ANALYSIS BY CITY (CHINA)

Cities in China are marked by the number of sectors which have reported neutral effects on their market. That position can be seen from the fact that each city displays only a few bands of colour, the rest being at the zero point, the red line.

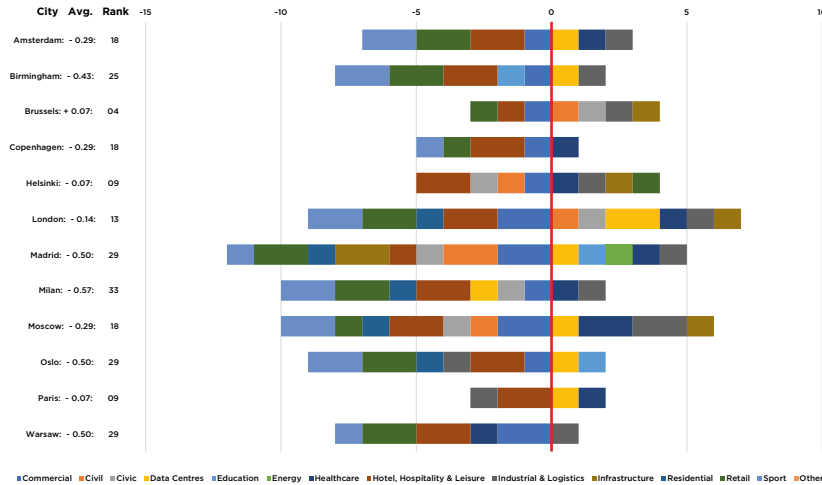
Beijing is the top performer, also leading the global table, ranked 1 over the whole global survey. However, all of the Chinese cities rank in the top 20% of global cities in the survey and show slight improvement on their sector performance since the previous survey.



SECTOR ANALYSIS BY CITY (EUROPE AND UK)

Although Madrid now leads the way in terms of adverse sector effects, Madrid itself has reported a slight improvement in sectors' conditions, in comparison with the previous survey.

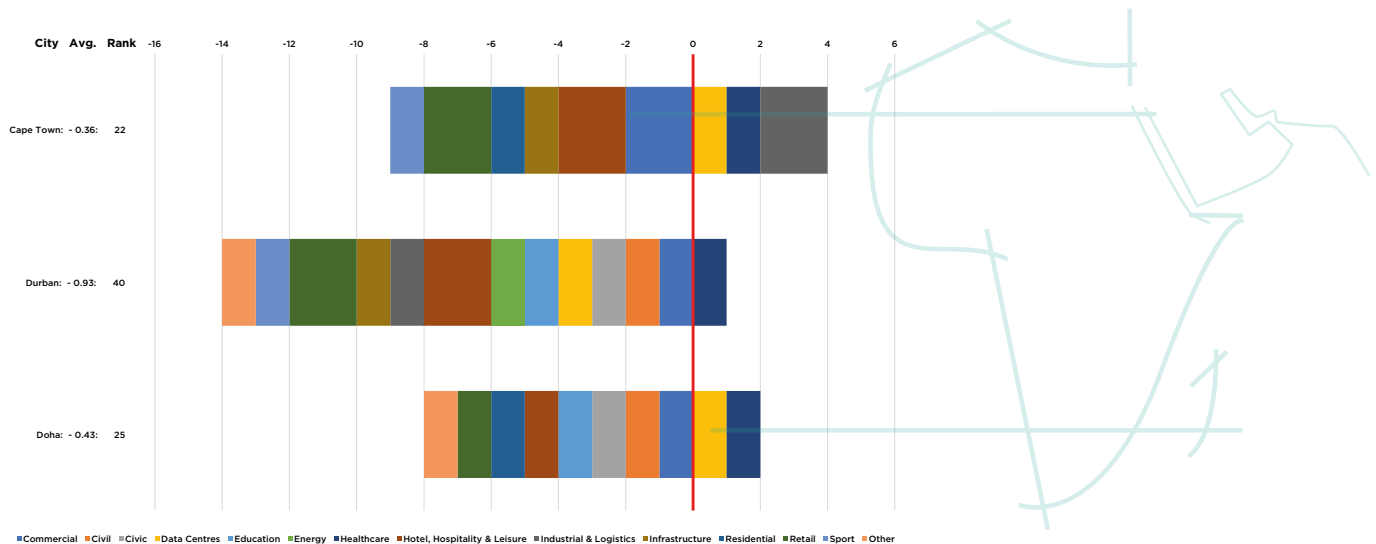
Only Copenhagen, Milan and Warsaw have shown slight sectoral deterioration, whereas the rest of the city responses have been neutral or slightly improved. While London appears to lead the way in positive performance, overall, negatively affected sectors counterbalance that effect, and so Brussels is the best-performing European city in this edition of the survey. Many sectors in Brussels are recorded as having neutral impacts, and those that have been affected either positively or negatively, have not been seriously impacted.



SECTOR ANALYSIS BY CITY (MIDDLE EAST AND AFRICA)

In the Middle East and Africa region, overall rankings can be seen to be mostly in the lower half of overall performance, with the marginal exception of Cape Town, which sits almost exactly in the middle of the table of 45 cities' results.

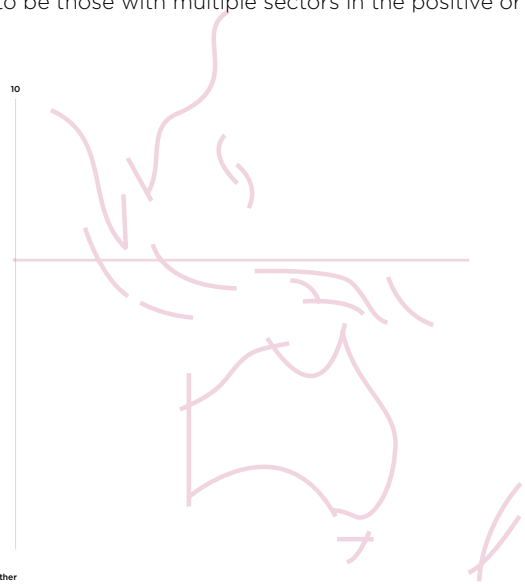
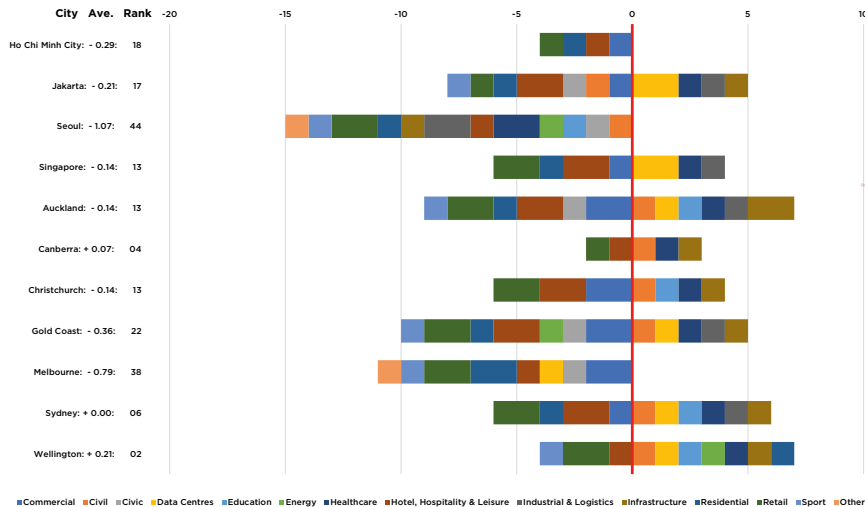
Durban is particularly badly affected, and its ranking is in the 12% most affected global cities. Most of Durban's sectors have been recorded as having experienced negative impact, but not extremely adversely so, the one upside being the healthcare sector, which has been recorded as positively affected in Durban, as in each of the other cities.



SECTOR ANALYSIS BY CITY (OCEANIA AND SOUTH ASIA)

In Oceania and South Asia, the best-performing cities are Wellington, Canberra and Sydney. The most adversely affected are Seoul and Melbourne.

The rest of the cities generally sit in the middle of the rankings range. Most of the cities have multiple positive sectors, which is helping to alleviate the negative impacts. However, the overall effect on a city's market is dependent on the proportion of the total market that is covered by any one sector, so the best performers will tend to be those with multiple sectors in the positive or neutral parts of the chart.



CONCLUSION

Most economies have featured a mixture of targeted lockdowns aimed at virus suppression, married with the uncomfortable knowledge that hampering business viability does not lead to an easy exit from the outbreak. Even where locations had been considered to have all but beaten-back the virus, new localised outbreaks have given rise to what some view as draconian measures, which others see as inevitable and necessary.

The long view is that recovery, in whatever form, is inevitable, but new ways of working may be here to stay, having been brought forward by several years as of necessity.

For construction, the overwhelming view appears to be that although input costs are rising, from the standpoint of availability of skilled workers, sufficiency of materials and worksite productivity, nonetheless tender prices have in many locations come under, or are about to come under, severe pressure. That is a consequence of rational decision-making on the part of directors of businesses, who have to accept that winning marginally priced work is better than having no replacement work.

This gives rise, however, to a delicate balancing act on the part of the public sector in most countries. In funding an economy back to life, a government is faced with the difficult

choice of taking on even more debt to fund public work, and selecting how to spend that money to best create value, whilst stimulating spending to multiply its way around a stumbling economic environment. Alternatively, some governments may be quite averse to taking that path, but that then demands an alternative solution to restore the economy to vibrancy.

The long-awaited solution, namely a vaccine, remains awaited, but is necessary if ongoing constraints to life and work are to be lifted. However, even then, the speed and method of roll-out will need to be addressed methodically to ensure the best economic outcomes overall.

For now, it would be fair to say that defensive measures are in place around the world, but the mere existence of these measures is changing economies everywhere, as jobs are lost that cannot be easily replaced, and industries are threatened that may not be replaceable.



ABOUT RIDER LEVETT BUCKNALL

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