



REPORT

COVID-19: GLOBAL SURVEY

THE IMPACT ON THE CONSTRUCTION SECTOR ACROSS THE WORLD

DECEMBER 2020 - ISSUE 7

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 48 responses from RLB offices from 26 countries, providing current views on a series of structured questions designed to elicit detailed and comparable responses to show the differing and evolving impacts of the pandemic.

This survey, dated 23 November 2020, is dominated by the recent announcements about the progress of COVID-19 vaccines, two of them having shown higher efficacy rates than many had dared hope for. This is highly positive news and the vaccines will accelerate the timetable to the end of the pandemic.

However, although we have consistently witnessed that construction has been seen by most governments across the world as a catalyst to economic recovery, we believe that in many countries the effects of the pandemic will not be overcome soon and many businesses will continue to be challenged.

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

48%

of respondents report ongoing lockdown scenarios in their respective countries.

Lost productivity

Almost 88%

of respondents record falls of productivity of not exceeding **20%**.



Tender enquiries

81%

of our respondents reported less than **30%** in consultant enquiry drop-off.



Consistent best performing sectors



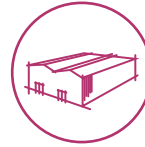
Data centres



Healthcare



Infrastructure



Industrial & Logistics

Government response

Over 50%

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



Least

affected cities sectorally by **continent**



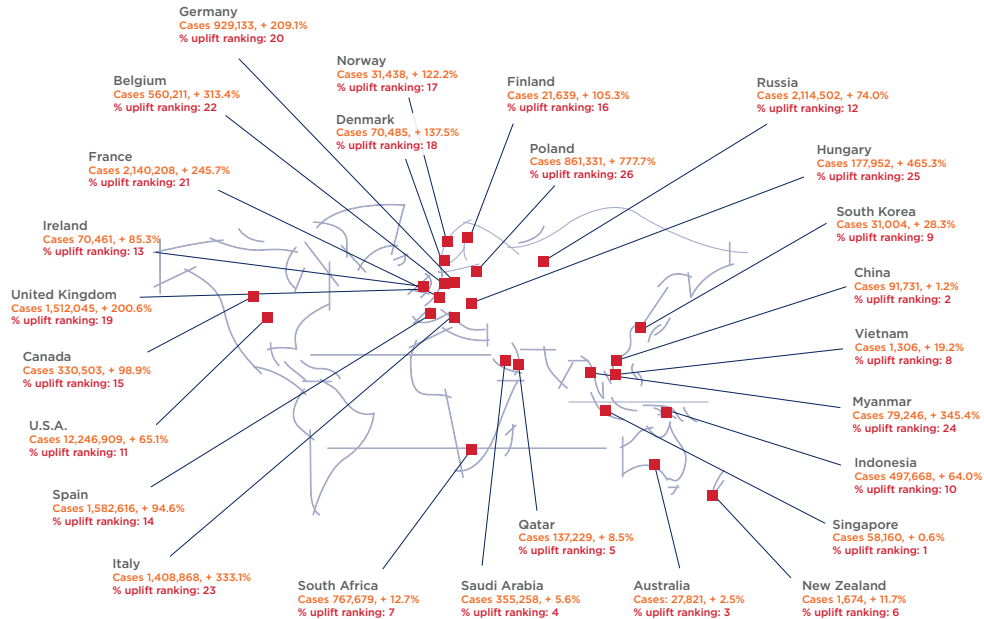
LAS VEGAS	AMERICAS	NEW YORK
BEIJING	CHINA	MACAU
BUDAPEST	EUROPE & UK	DUBLIN
CAPE TOWN	MIDDLE EAST & AFRICA	RIYADH
SYDNEY/WELLINGTON	OCEANIA & SOUTH ASIA	MELBOURNE



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 7 of the survey. We have represented in orange the number of COVID-19 cases confirmed in each country as at 23 November 2020, and a percentage increase from the number of cases confirmed as at 5 October 2020.



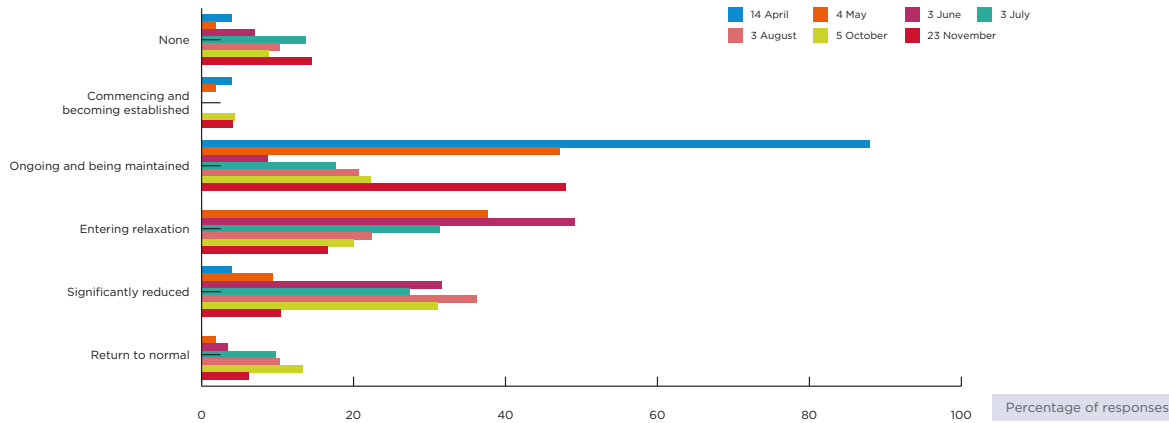
Source: RLB R&D, derived from: Hale, Thomas, Sam Webster, Anna Petherick, Toby Phillips, and Beatriz Kira (2020). Oxford COVID-19 Government Response Tracker, Blavatnik School of Government.

ANALYSIS

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

This latest edition of our global survey shows a significant change from the previous survey, as now more than double the percentage of respondents - almost 48% - are reporting ongoing lockdown scenarios.

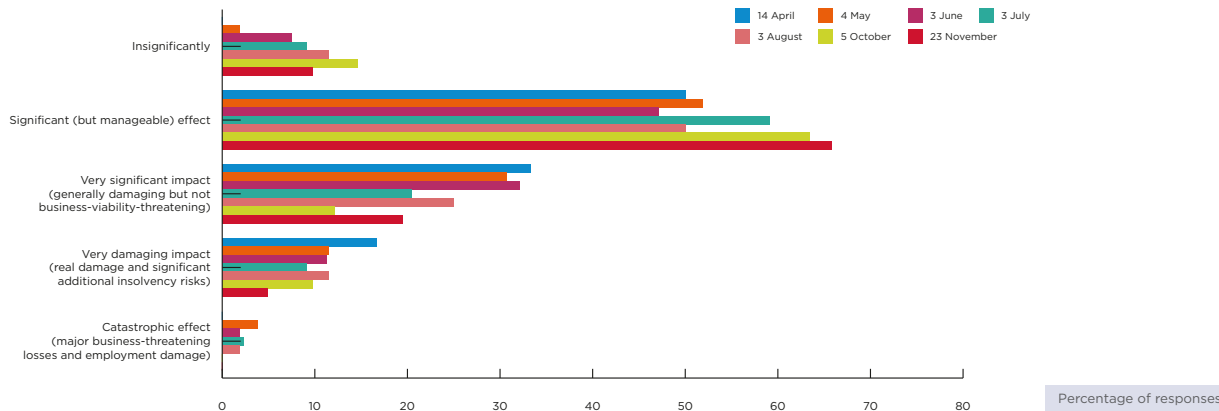
This reflects the continuing 'second-wave' of the pandemic, though the effects vary from city to city across the world.



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

The prevalence of the response that lockdown effects are “significant but manageable”, continues to rise, now standing at almost 66% in this latest edition. However, almost 20% of our respondents believed that effects are damaging, though not business-viability-threatening.

In total, the responses in these two categories amount to over 85% of all responses, reflecting the considerable perceived seriousness of the ongoing effects of the pandemic.



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

In common with our last survey in October, views in relation to the lockdown effects across various countries echoed a common theme.

A comment from Portland, **USA**, summarised the sentiment of many commenting that “construction has been deemed an essential service since the beginning of the pandemic and as such slowdowns in the construction market are related to market forces and are not due directly to governmental restriction”. There were some views expressed around new projects being slower or paused that might impact further activity, with Milan, **Italy** commenting “one could expect construction activity to decline somewhat next year due to the 2020 pause in pre-construction planning”.

However, in those areas where new cases are slowing there was cause for optimism, with Melbourne, **Australia** stating “coming into Christmas and with near to 30 days of no new cases and positive news on vaccines, there is some hope for 2021.”



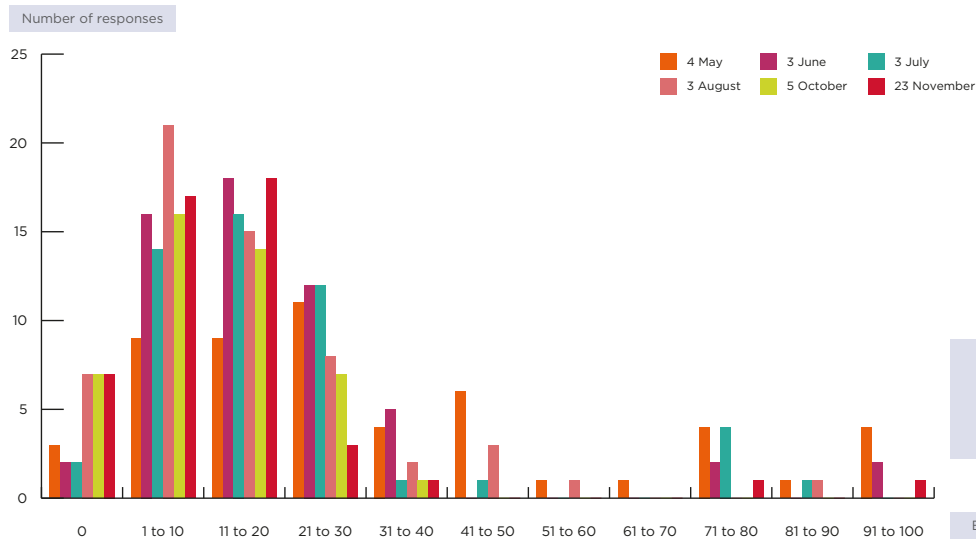
“Economic activity has not stopped during the latest lockdown”

Brussels, Belgium

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

Views on percentage falls in productivity were again centred on the range from zero up to 20%, which accounted for 42 of the 48 responses. Once again, the bulk of respondents,

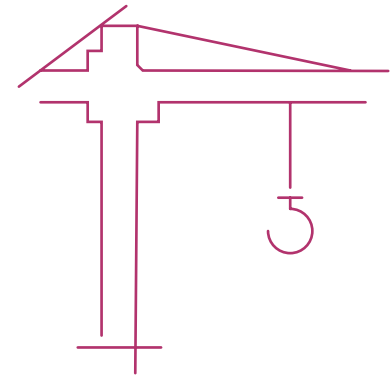
almost 73%, recorded falls of greater than zero but not exceeding 20%. This seems logical, given construction sites' rapid responses to changing circumstances and grasping the opportunity, in most economies, to carry on working despite the existence of the virus, but clearly with enhanced safety rigour.



As part of issues 2 to 7 of our surveys, 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?

Comments shared about the causes of any fall in productivity remained mixed. Some indicated that ensuring safety measures are implemented was having an impact and others noted that lost productivity was difficult to measure. In some areas, issues with regard to supply chain and materials were quoted, for example our colleagues in Wellington, **New Zealand**, responded that they were “starting to get delays in overseas delivery through shipping channels, as we are unable to source containers and dock time is also very constrained” and in Moscow, **Russia**, there was an impact “due to the fact that most of the workforce from abroad returned home.”

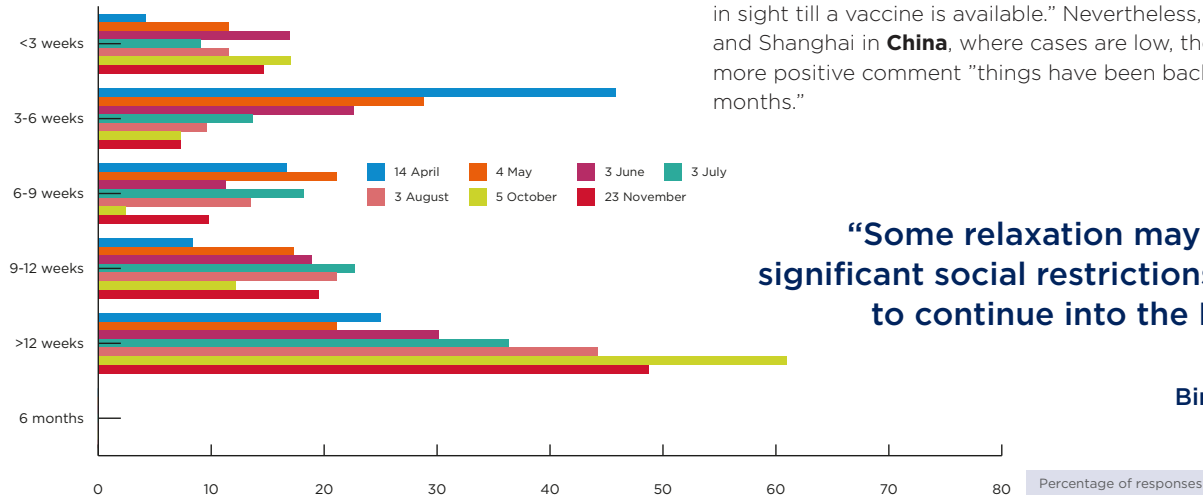


“Most sites have good safety practice, but material shortages may well be affecting productivity.”

Chicago, USA

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

Views that lockdown removal lies more than 12 weeks away had diminished, as almost two months have passed since our previous survey.



However, nearly 49% of our respondents, compared to 60% in October, still foresaw a minimum three-month hiatus before normal activity returns in their locality.

Commentary in relation to how long respondents forecast for social lockdown to be completely removed reflected the varying waves of the virus across the globe. Our colleagues in Toronto, **Canada**, stated “restrictions are being reinstalled or increased due to a second wave being much worse than the first outbreak” and in Dublin, **Ireland**, the view was “no end in sight till a vaccine is available.” Nevertheless, in Chengdu and Shanghai in **China**, where cases are low, there was a more positive comment “things have been back to normal for months.”

“Some relaxation may occur, but significant social restrictions are likely to continue into the New Year.”

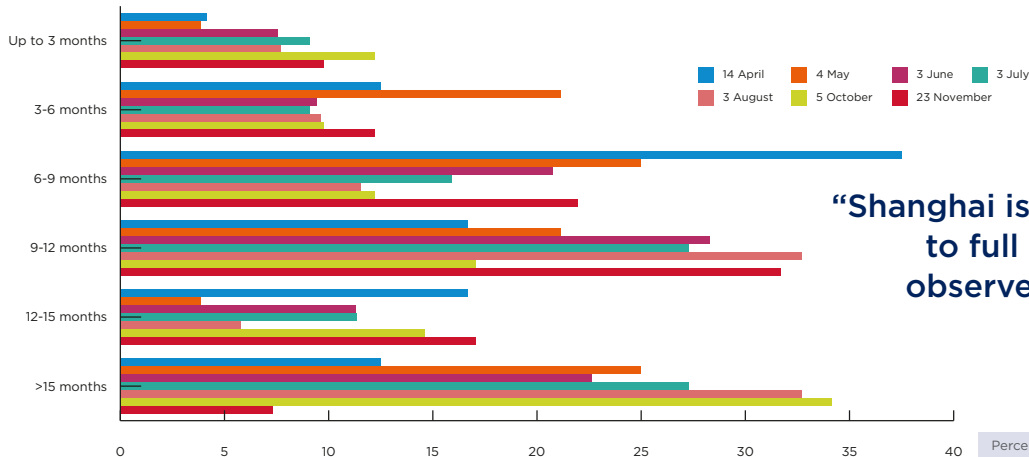
Birmingham, UK

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

The major change shown in this survey relates to figures for the expectation of a market recovery of in excess of 15 months, which fell sharply.

The bulk of this change had been distributed in views ranging from 6 to 12 months, perhaps informed by recent positive announcements as to the possible availability of vaccinations in 2021.

Our correspondent in Seoul, **South Korea**, stated “we believe the local market in South Korea can be recovered in a few months’ time” and Berlin, **Germany**, reinforcing this sentiment with “assuming effectiveness and availability of a vaccine,” whilst in Doha, **Qatar**, they commented that recovery was “speculative, dependent on the regional and global situation.”

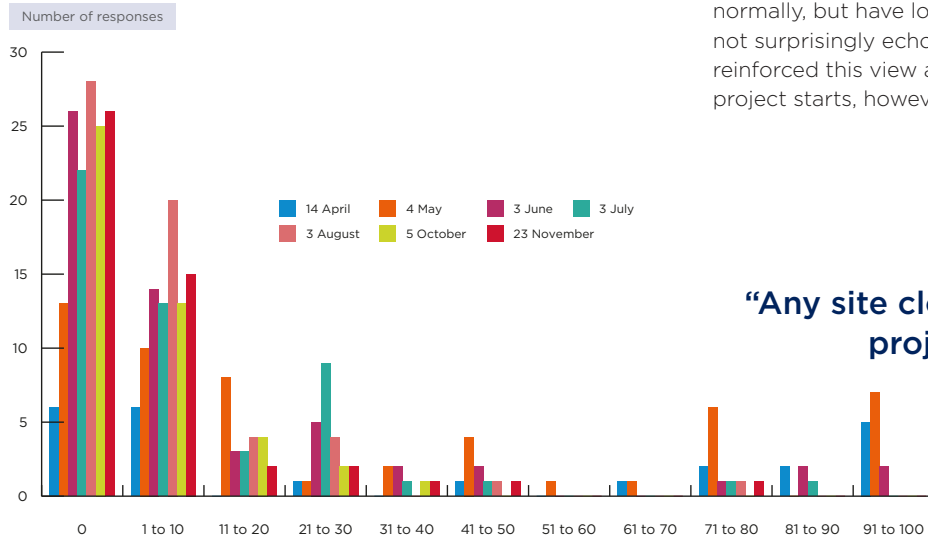


“Shanghai is on track and is close to full recovery. We need to observe how sustainable this recovery will be.”

Shanghai, China

6. WHAT PERCENTAGE OF CONSTRUCTION SITES ARE CURRENTLY CLOSED?

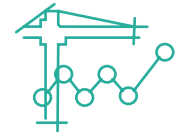
As with our last survey in October, over 50% of respondents reported they had no site closures. Overall, 85% of our colleagues reported less than 10% of sites being closed. This signifies an ongoing return to something approaching



normality in terms of sites remaining open and active.

However, the sites that are closed seem to be continuing to reflect either works having been deferred, rather than sites having been closed due to lockdown, or intermittent site closures as a result of workers receiving positive tests for the virus.

The view from Helsinki, **Finland**, that “sites are running normally, but have lots of extra protection measures” was not surprisingly echoed across many regions. Waikoloa, **USA**, reinforced this view as “there has been a slow-down in new project starts, however, no existing sites are currently closed.”



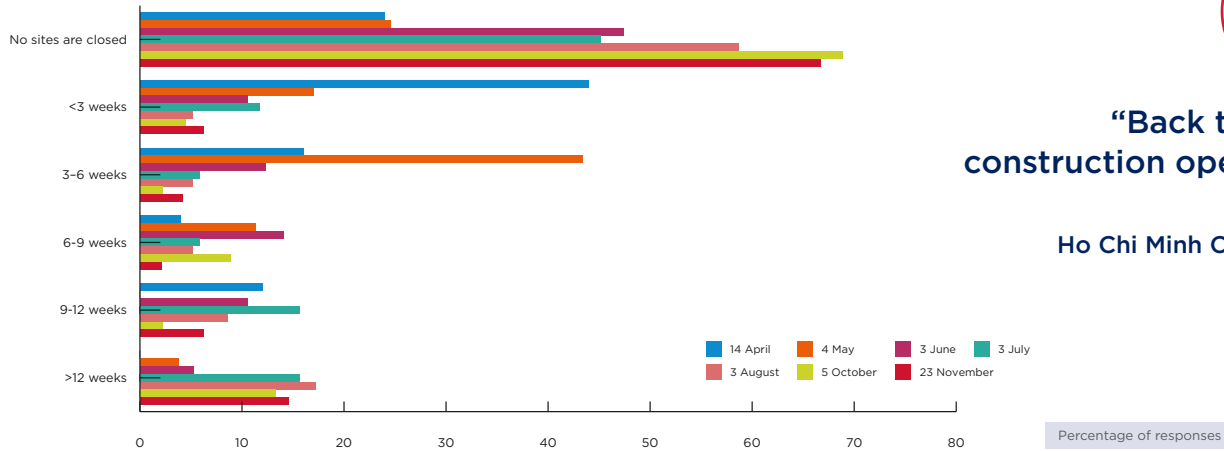
“Any site closures are due to individual project issues and not imposed governmental restrictions.”

Portland, USA

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

Responses again recorded that in over two thirds of locations, site work was continuing, though with varying levels of constraints.

Some sites remain closed, but the overview was that there are several reasons for such closures and there are some intermittent closures due to deep cleaning with subsequent re-openings. Where sites are recorded as closed for longer periods, it seems that this is a result of general policy issues rather than direct COVID-19 infection concerns.



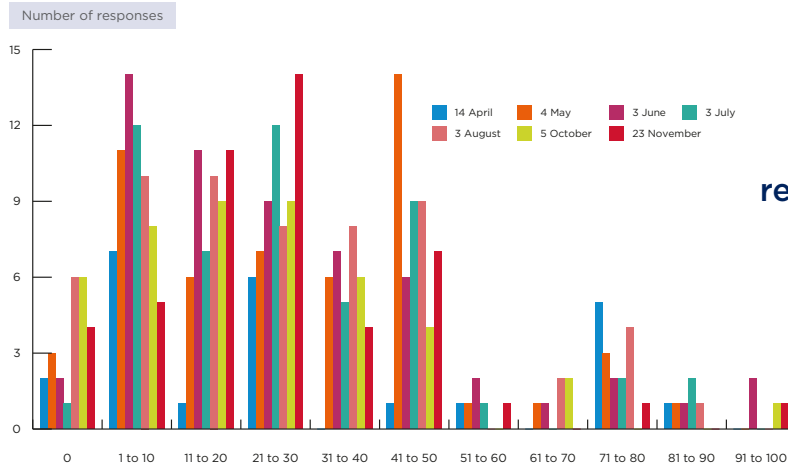
“Back to normal construction operations.”

Ho Chi Minh City, Vietnam

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

In line with the last few surveys, there continued to be a total of around 70% of respondents reporting up to 30% of projects held at pre-construction stage. However, this survey showed a slight increase in those responding in the 21-30% category suggesting a developing awareness of projects being deferred or shelved at least temporarily.

Generally, commentary was split between the impact on sectors, as well as on regions. For example, Macau, **China**, commented, “most of the projects in commercial sectors are on hold” and in Waikoloa, **Hawaii**, where tourism and hospitality is a key economic driver they reported that “there has been a domino effect, whereby a decrease in investment in the hospitality sector has trickled down to other related industries.”



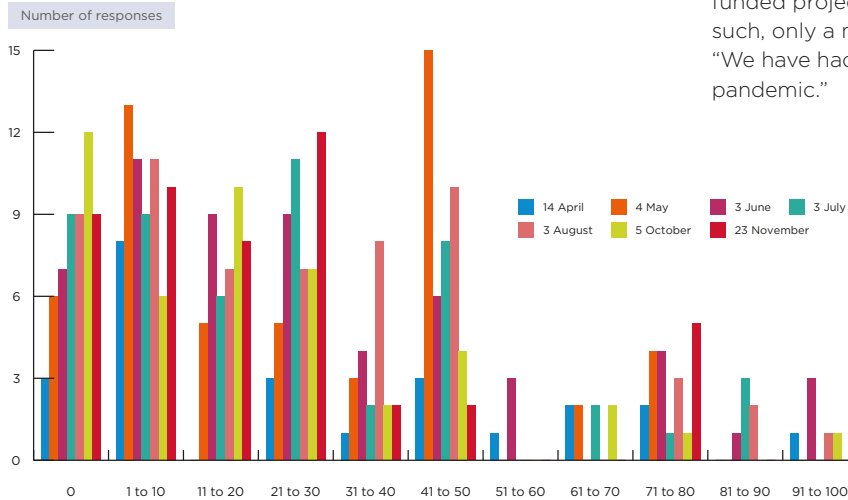
“Whilst many projects have now recommenced, they have done so at a very slow rate and some projects expected to start this year will now be starting first or second quarter or even later on next year.”

St Lucia, Castries

Expressed in groupings of 10%

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

Drop off rates in enquiries reflected project delays with the majority of respondents, 81%, claiming a range of up to 30% drop-off. This is aligned with the figure from October's survey however, in this latest survey there was talk of additional bidding opportunities, again reflective of the range of activity



“Short term enquiries are holding up. Instructions are taking longer to come through and gateway review points may be extended and become protracted”

across different sectors, rather than different regions.

There was a definite sentiment in the **USA** of “plans being halted while the COVID-19 impact is being assessed,” as noted by the New York office and “clients are waiting to see the progress of the pandemic and are holding back money until that time.”

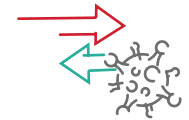
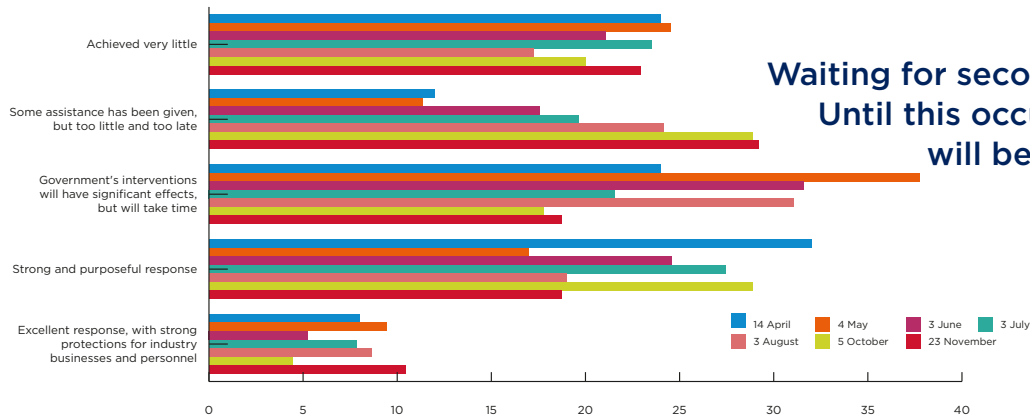
However, in Europe the feeling was more positive with Berlin commenting, “**Germany** has a backlog of permitted and funded projects and a shortage of constructing capacity, as such, only a marginal drop off,” and Oslo, **Norway** responding, “We have had a steady flow of enquiries throughout the pandemic.”

Birmingham, UK

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

This survey has recorded a broad sweep of views on the efficacy of governments' responses to the pandemic, although there was some evidence of respondents' opinions softening from overall satisfaction toward the possibility that more could or should be done.

Comments about government intervention include "previous intervention measures have been effective in avoiding massive unemployment and business closures, but the lack of further measures in the coming months may see a worsening of unemployment rate," expressed in **Hong Kong**. In **Portland, USA**, they commented that "COVID-19 response is handled largely at the state, county, and local level. There is little federal guidance or oversight." Many also stated there had been government investment in infrastructure in their region to support economic recovery.



Waiting for second round of stimulus. Until this occurs, I believe projects will be put on hold until the uncertainty settles."

Washington DC, USA

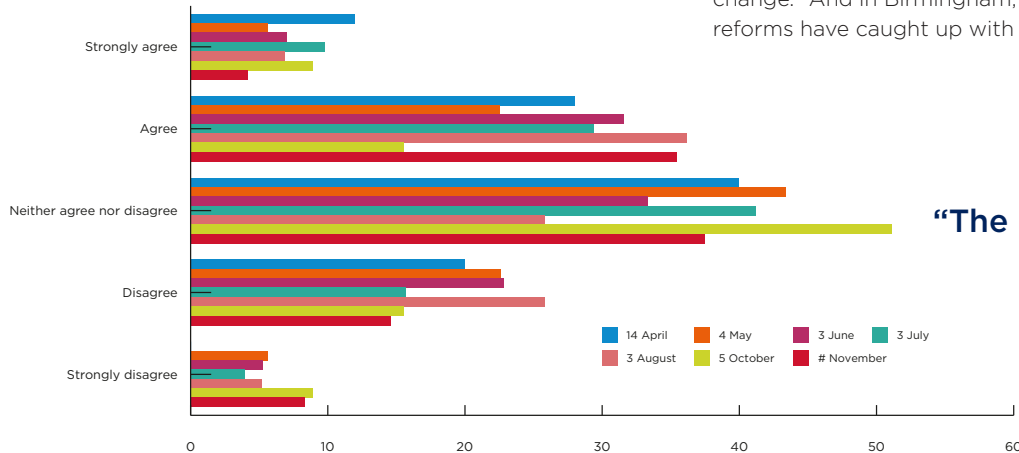
Percentage of responses

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

There has been a significant shift from our last survey about whether a more relaxed planning process should or would take place, with 40% of our respondents agreeing or strongly agreeing there is a need for a policy-led stimulus for the market. However, there was still recognition in some regions

that even if the intent is there it may take time to break down bureaucratic processes.

Commentaries in relation to whether the pandemic would affect the “easing up” of planning to support active development were consistent globally. In the **USA**, where obviously there is a change of party governance from early 2021, they stated that “with the new President, the speed of recovery will be slow and cautious.” This sense that change was not on the immediate horizon was echoed in Berlin, **Germany** “the system is relatively bureaucratic and unlikely to change.” And in Birmingham, **UK** “the politics of the planning reforms have caught up with the government.”



“The intent is there but still strong opposition”

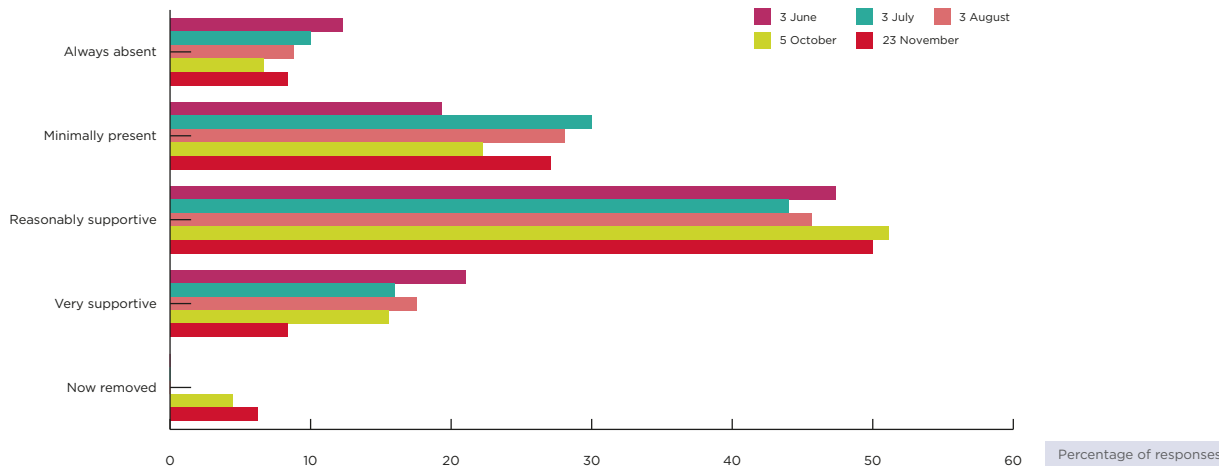
Auckland, New Zealand

Percentage of responses

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

Our survey reported views broadly consistent with the previous survey, with the sentiment that governments globally have been reasonably to very supportive. However, the overall view is that not enough has been done by governments to aid larger companies.

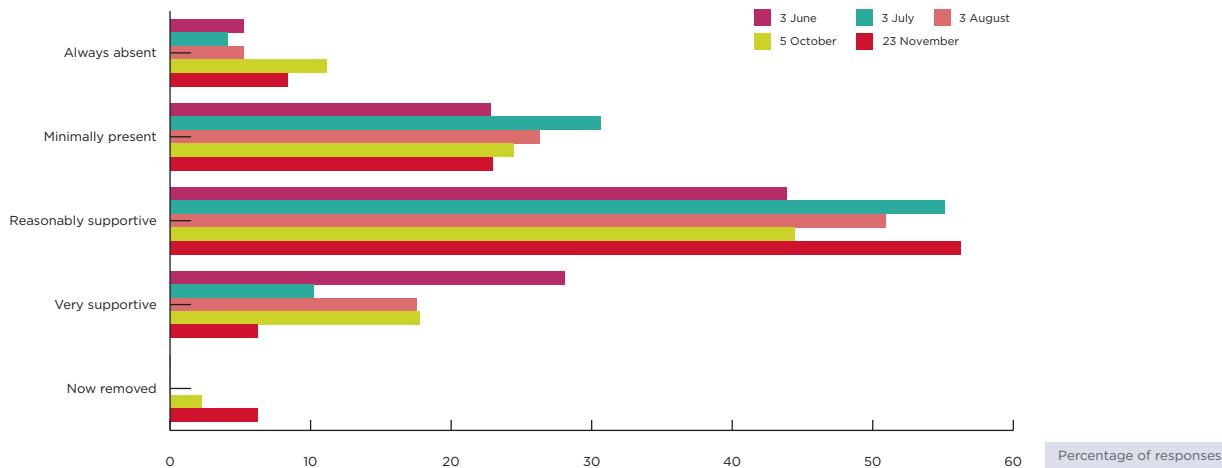
Surveys from July onwards include an update of responses to four questions regarding government support to different sizes of construction entities.



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

In contrast with larger companies, two thirds of respondents from this survey felt that government assistance had been at least “reasonably supportive”.

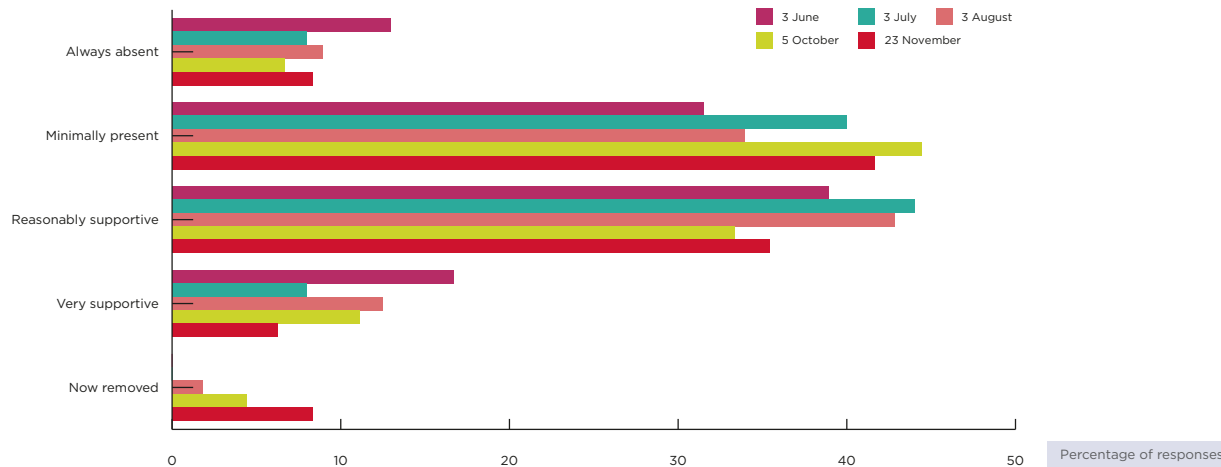
However, it is noteworthy that the number of respondents who felt “very supported” has declined from 17.8% to 6.3% since October with many possibly now wondering about the long-term consequences without ongoing government support to their businesses.



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

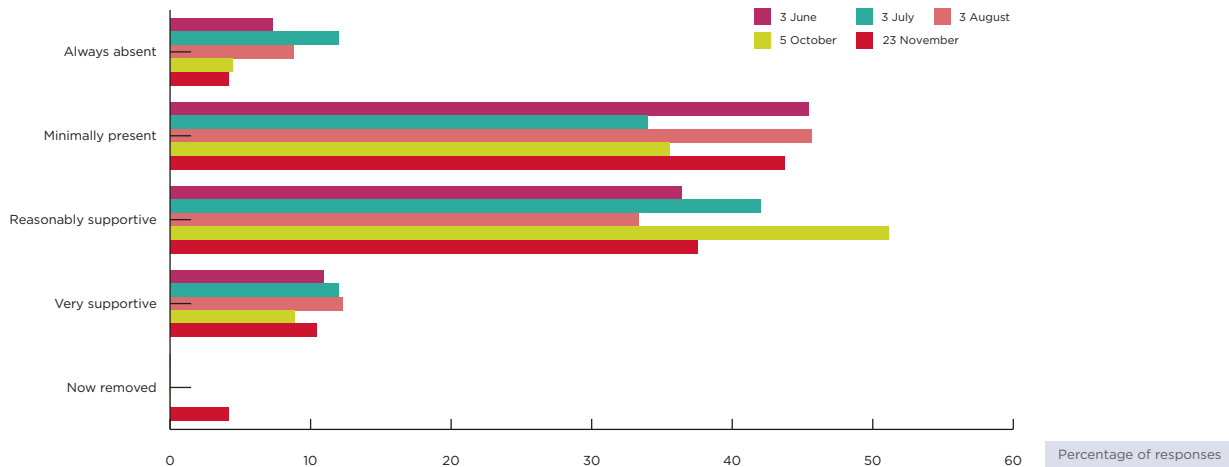
Reflecting the view expressed in the last report, over half of the respondents felt that there was no, or minimal, support in place for self-employed individuals.

There was also a 5% reduction in those reporting that the government had been 'very supportive'.



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

Government initiatives can take time to implement, establish and run through to fruition, and this seemed to be reflected in this latest survey with the appreciation of government support decreasing from the last report, despite assurances of further assistance in the pipeline.

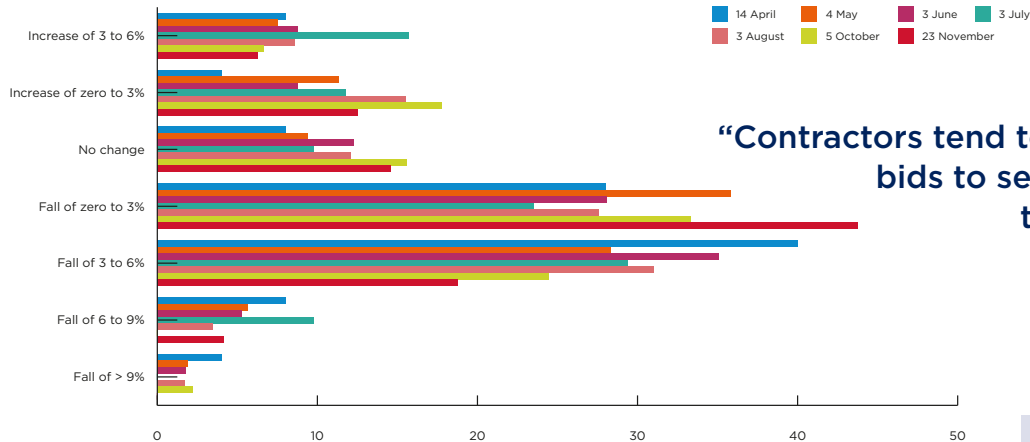


16. HOW WILL TENDER PRICES BE AFFECTED FOR THE OVERALL YEAR 2020?

Most of our respondents' views aligned within or either side of the category of "Fall of zero to 3%." The variation is reflective of the impact of the pandemic on specific regions.

Sentiment across the **USA** seemed to be one of a competitive workplace, "although costs may have increased, most tenders are more competitive as less work is available."

However in Sydney, **Australia** they commented, "tender prices received indicate a wide range of prices received, which means it is difficult to assess an actual fall in prices."



“Contractors tend to submit competitive bids to secure more works due to uncertainty ahead”

Shanghai, China

SECTOR ANALYSIS

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

Since Issue 6 in October, views have remained remarkably consistent in respect of performance of the various sectors.

That position follows-on from our comments in Issue 6 to the effect that sectors' performance had become largely dependent upon direct sector impacts such as in the hotel, hospitality & leisure sector, or knock-on effects arising due to, for example, increased demand in industrial & logistics sectors.

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. Meanwhile the short to medium term prognosis for such as the education sector are more complex bundles of issues.

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).

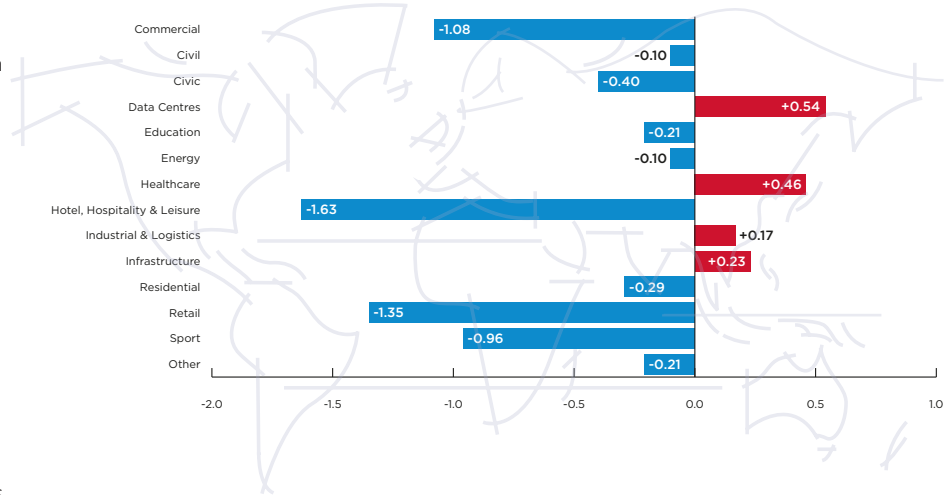
GLOBAL ANALYSIS BY SECTOR

The worst-affected sectors remain commercial, hotel, hospitality & leisure, retail and sport, which is consistent with previous surveys.

The beneficiary sectors remain data centres, healthcare, logistics and infrastructure; all showed gains from the changed business and lifestyle environment.

The data centre market is viewed as particularly viable, a point which is exemplified by the significant uplift of the sector's average, from +0.29 to +0.54 in this current survey.

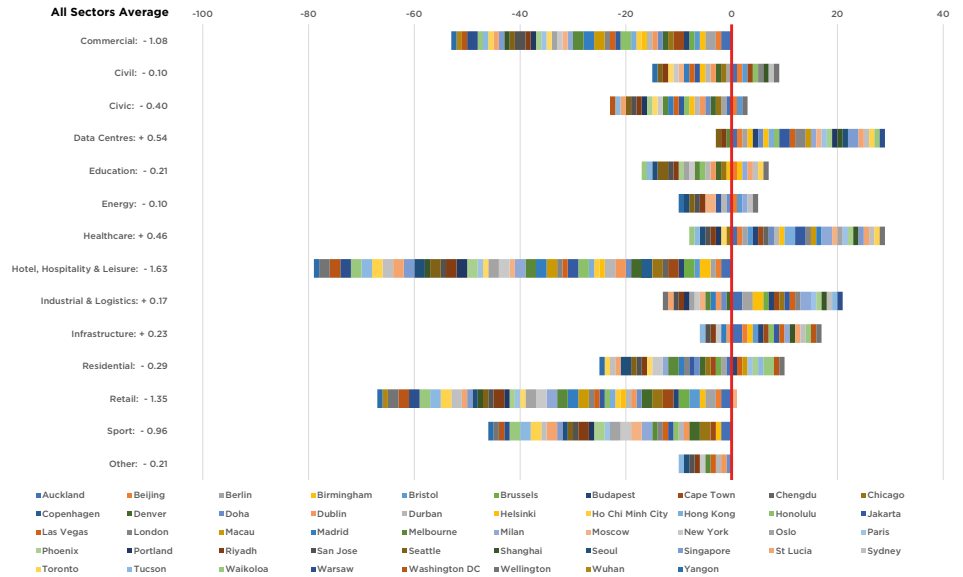
Healthcare has also benefited, moving from +0.28 to +0.46, but changes in this market can be viewed as a response to an issue, whereas changes in the data centre sector may infer a more wide-ranging market effect, as populations across the world move to a more on-line and "data intensive" existence.



CITY ANALYSIS BY SECTOR

The detailed sectoral breakdown shows that the commercial, hotel, hospitality & leisure, retail and sports sectors showed almost no positive performance at all. Only in Moscow was there any hint of a positive outcome for the retail sector.

The advent of vaccination for all could alleviate some of the distress in the short term, but the issue may be more long-lived as markets come to terms with significantly changed conditions.



SECTOR ANALYSIS BY CITY

The regional city-centric analysis of sectors, overleaf, 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 country.

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.

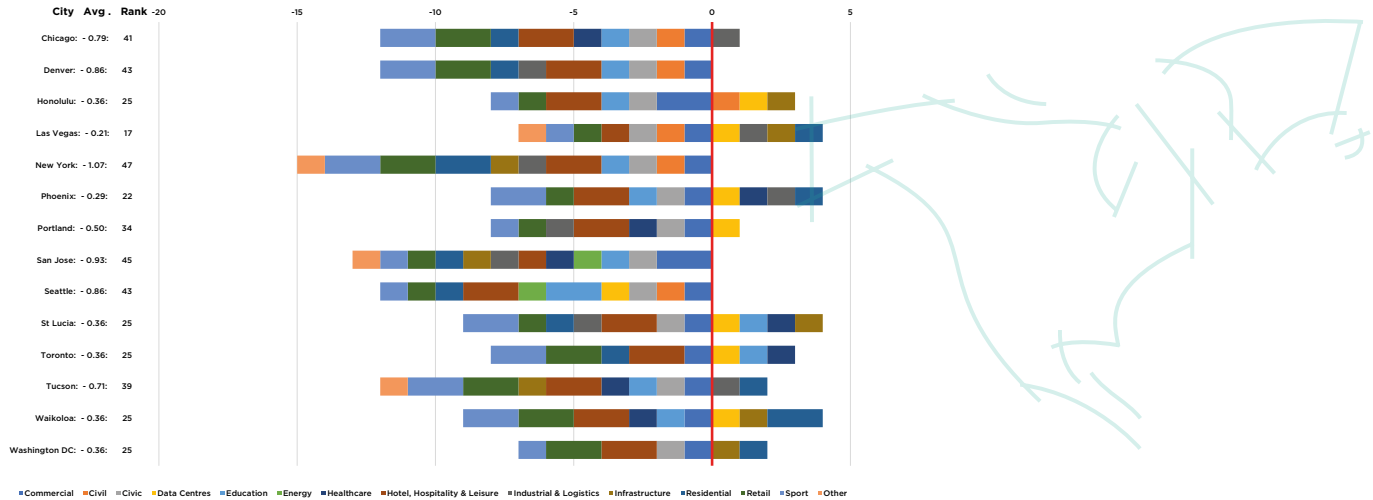


"Although house sales in the last few months have been incredibly active due to the Stamp Duty Holiday and Help to Build schemes, the next few months are less certain. "

London, UK

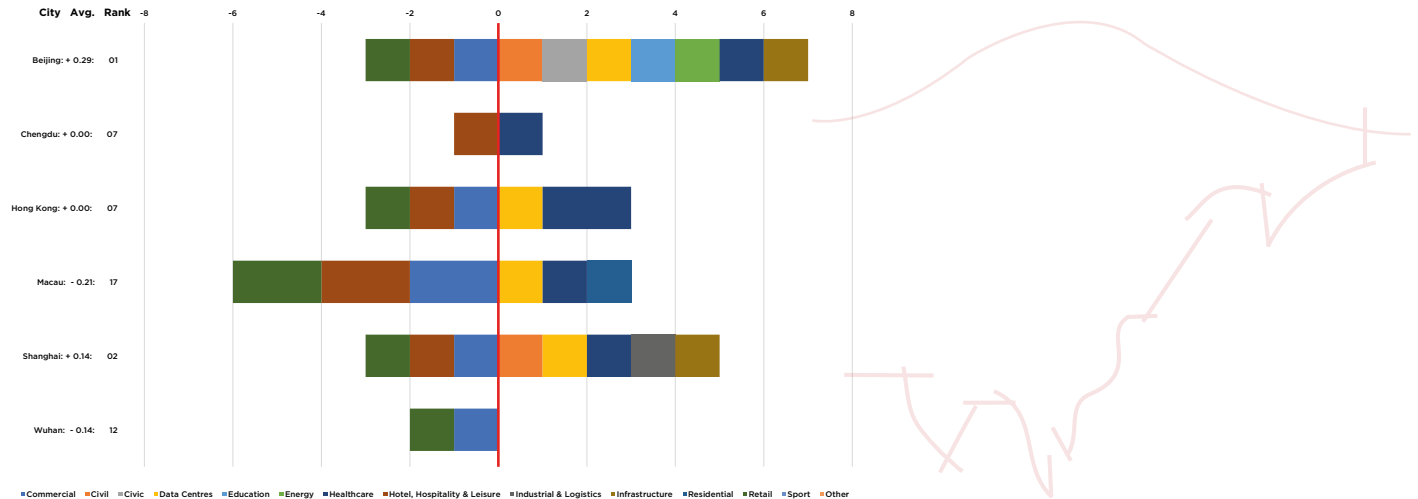
SECTOR ANALYSIS BY CITY (AMERICAS)

In this survey, New York took the place of Chicago as the most affected city by sector, followed by San Jose and then Denver and Seattle. Overall, only Las Vegas and Phoenix featured in the top half of global performers, ranking 17th and 22nd respectively. In both of these cities there were multiple positive sectors balancing the negative influences to an extent, although the overall picture remained biased towards the negative.



SECTOR ANALYSIS BY CITY (CHINA)

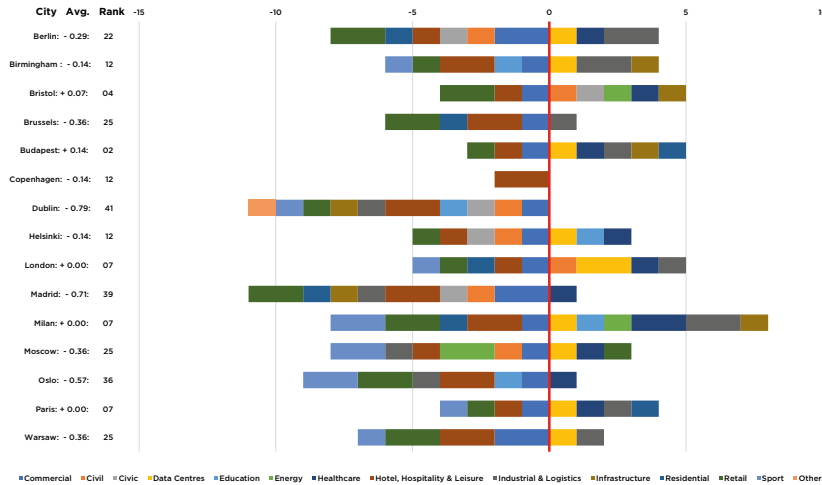
Almost all of China's cities featured in the top third of global rankings, only Macau falling short just marginally. Beijing and Shanghai also both showed positive effects after having run through the worst of the COVID-19 impacts. In fact, apart from Macau, all of the Chinese cities in this latest survey were ranked in the global top 25% for sectoral performance.



SECTOR ANALYSIS BY CITY (EUROPE AND UK)

Sectoral performance in Europe and the UK was spread across the range of rankings, from Budapest, Hungary, at ranking of 2 at +0.14 through to Dublin's ranking of 41 at -0.79.

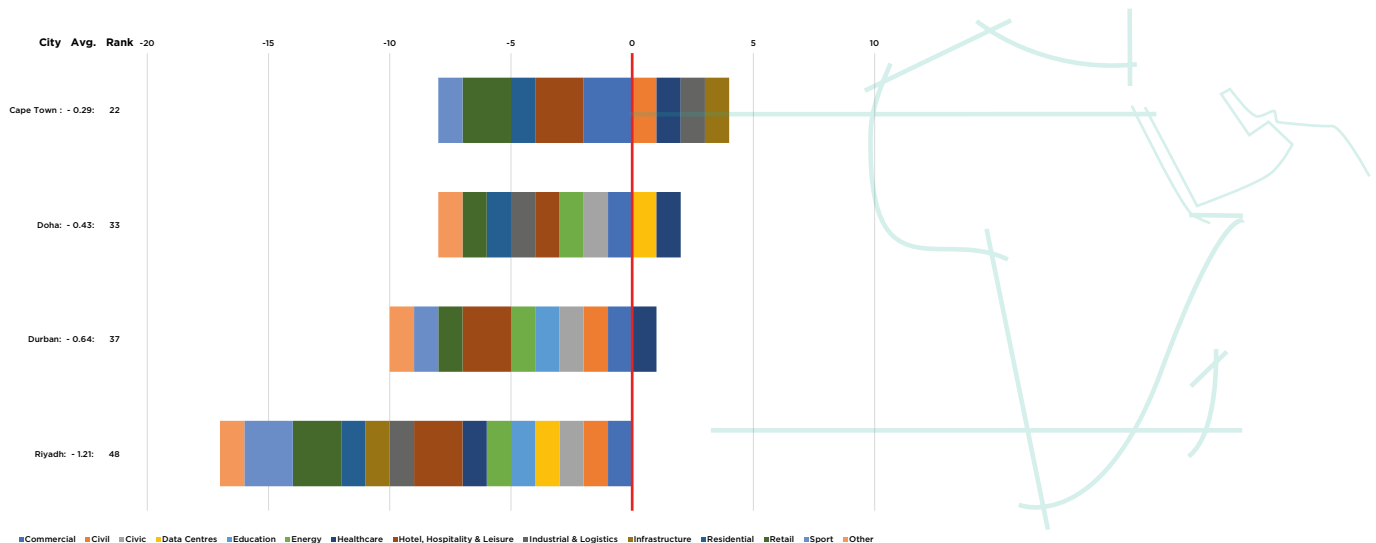
The significance of the spread demonstrates the diversity of the COVID-19 experience across Europe with the differences in responses needed to exit the pandemic. In **Hungary**, Budapest's construction market was booming before the pandemic struck, which perhaps cushioned the impact to an extent. In Dublin, **Ireland**, whilst four sectors showed neutral effects, the rest were negative, with hotel, hospitality and leisure particularly adversely affected.



SECTOR ANALYSIS BY CITY (MIDDLE EAST AND AFRICA)

Of the four cities covered in this analysis sub-set, only Riyadh, **Saudi Arabia**, had no positive sectors, which explains its last place ranking in our global list. However, only hotel, hospitality & leisure, retail and sport were very adversely impacted, so there is some consolation in that fact.

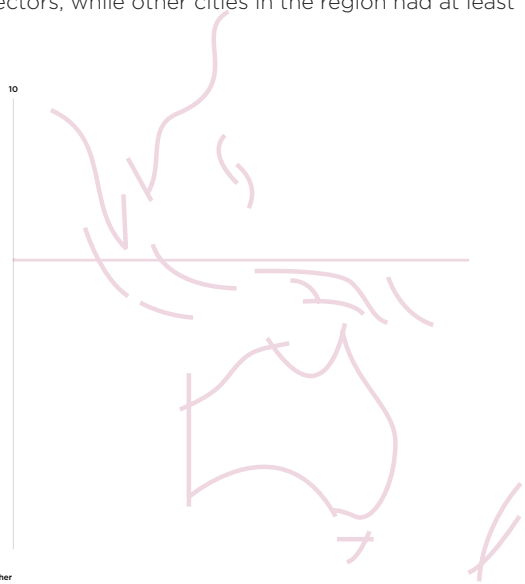
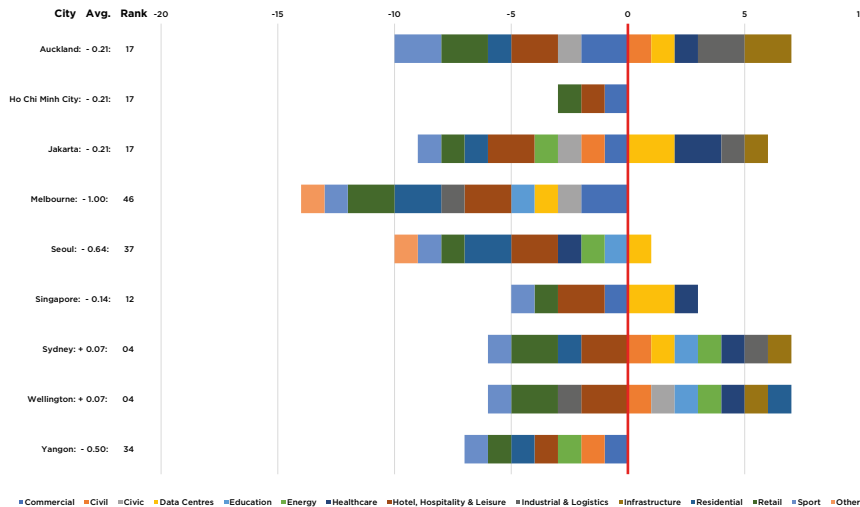
At the other end of the range, Cape Town, **South Africa**, was the best performer, but its overall ranking was still only 22 out of 48 at -0.29 average, resulting in it being near to the middle of the global group.



SECTOR ANALYSIS BY CITY (OCEANIA AND SOUTH ASIA)

In Oceania and South Asia, both Wellington in **New Zealand** and Sydney in **Australia** were the clear best performers, standing at joint 4th place in the global ranking. For **New Zealand**, Auckland showed a more affected industry even though nationally the country has had among the best outcomes overall.

Melbourne in **Australia** reflects the rigours of lockdown as their second wave largely closed-down economic activity, while both Ho Chi Minh City in **Vietnam** and Yangon in **Myanmar** also showed no positive sectors, while other cities in the region had at least one positive sector to weigh against the adverse effects.



CONCLUSION

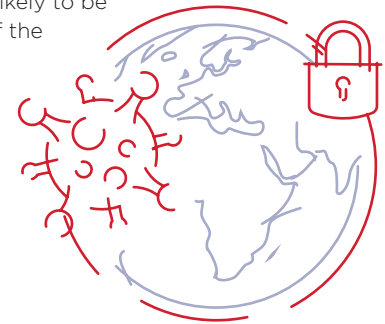
The passage of almost two months since our last COVID-19 Global Survey saw infection cases globally rise from 40.7 million to over 60 million, an increase of almost 48%. As a consequence, many of the countries in our survey had to cope with “second waves”, as lockdowns were re-imposed and businesses and economies once again had to deal with the rigours of stringent constraints on their activities.

However, the longed-for good news of vaccines’ arrival now seems to have given rise to hope of an end to the pandemic in the foreseeable, if not yet quite immediate, future. Between now and the time at which enough of any population has been vaccinated, there remains ongoing concern as to health and business security, as is amply demonstrated by responses to the RLB survey.

Our respondents covered the full scope of countries’ experiences, from the early responders and successful avoiders, through to the heavily affected. Governments’ chosen solutions vary widely, and no-one can say that there is any one sure answer, but success may be measurable in bounce-back after vaccination takes place in numbers.

Among all of the difficulties, there are still, of course, sectors and locations that are “winners” in the battle, most predominantly data centres, healthcare and logistics. These sectors’ expansion is common across the globe. On the other hand, sectors which before COVID-19 were considered vital contributors to the economy are severely impacted. The overall effect is that “winning” is relative, and successful emergence from the pandemic will also be measured in relative terms.

Medium and long-term changes could be quite substantial and far-reaching if working life patterns and expectations have been permanently changed by the pandemic. RLB will shortly follow-up this report with a study of views on what cities’ respondents feel is likely to be the downstream impact of the COVID-19 impact.



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