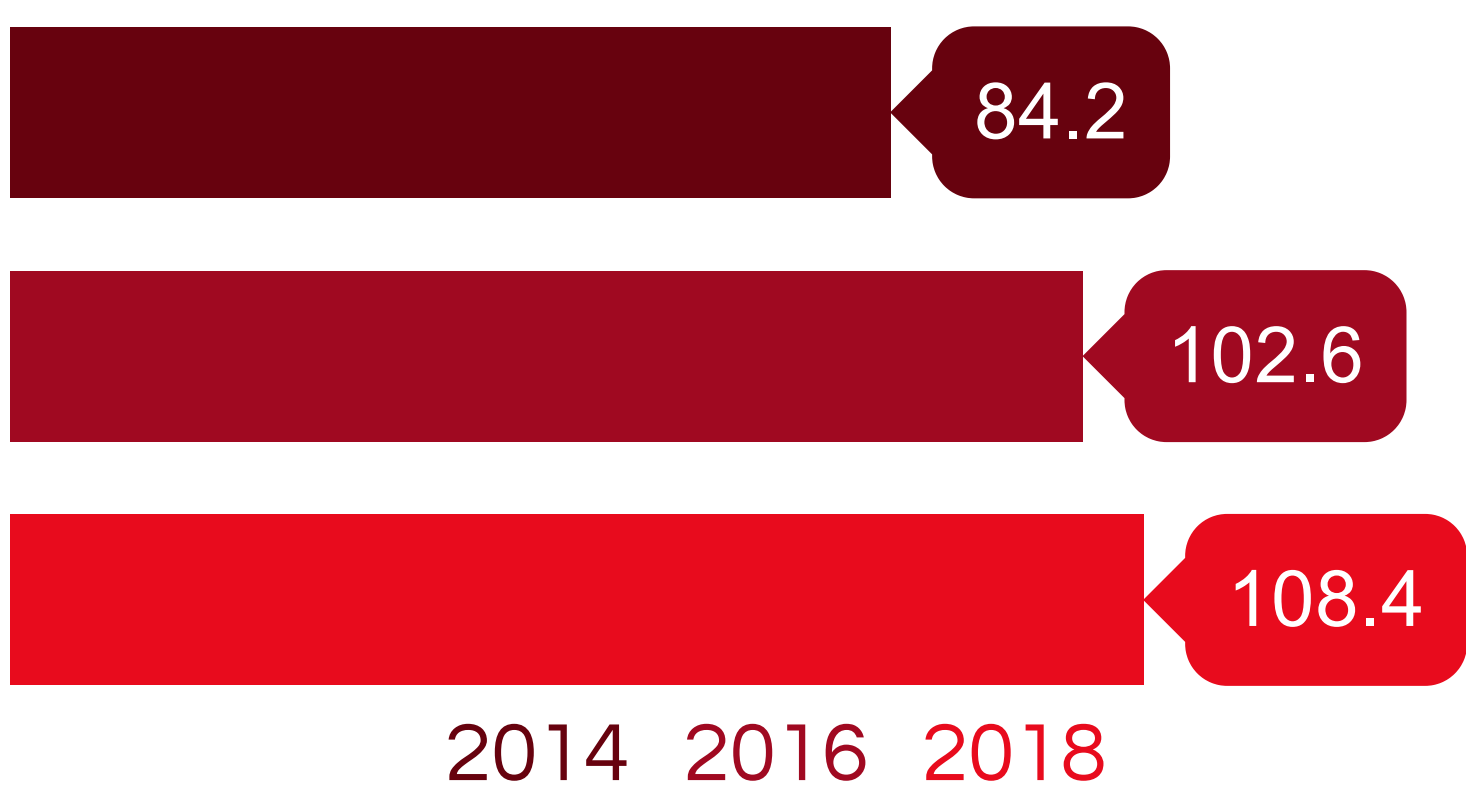
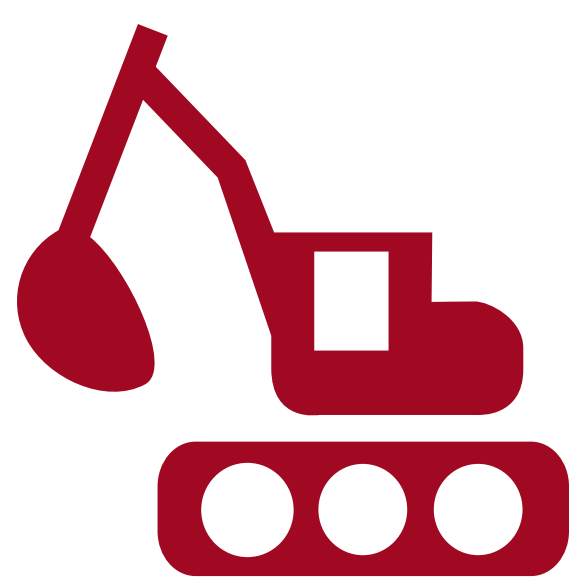


## Recent industry output



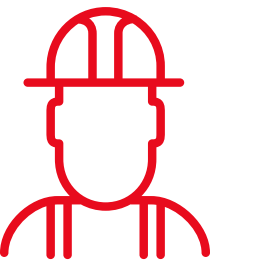
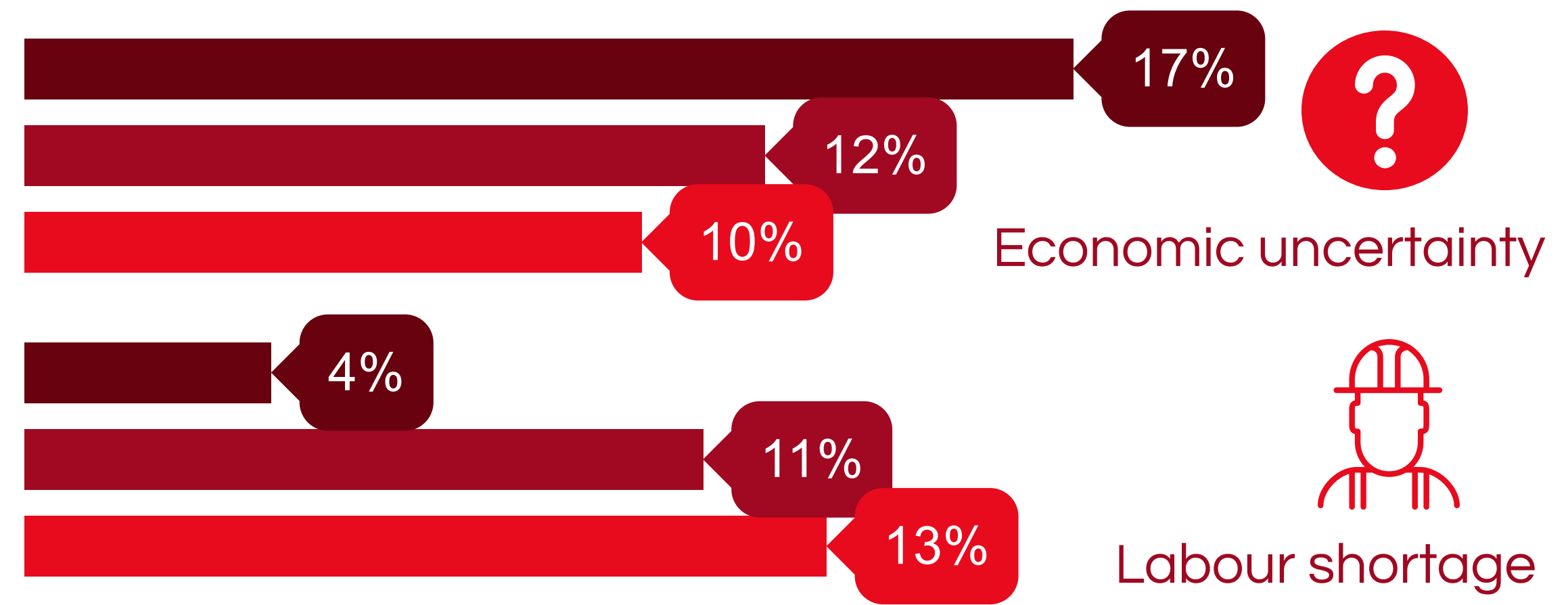
2014 2016 2018

Source: ONS Volume of Output Indices



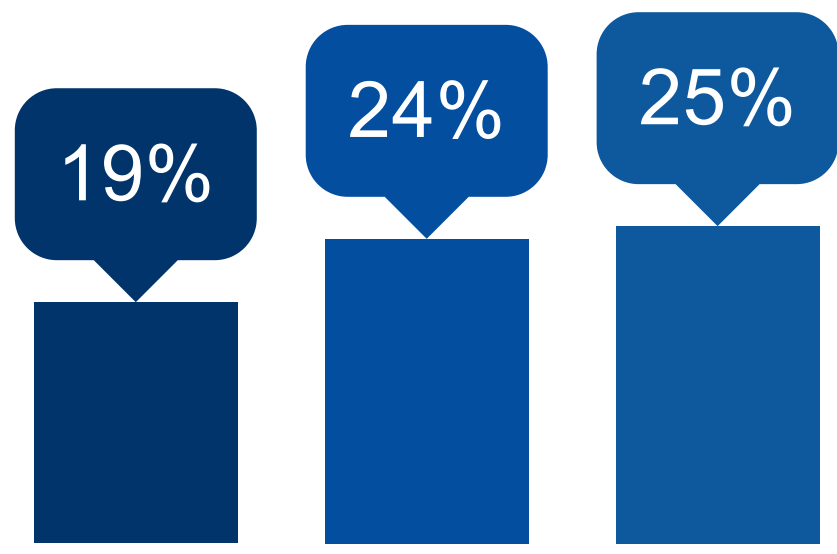
## Recent industry constraints

2014 2016 2018



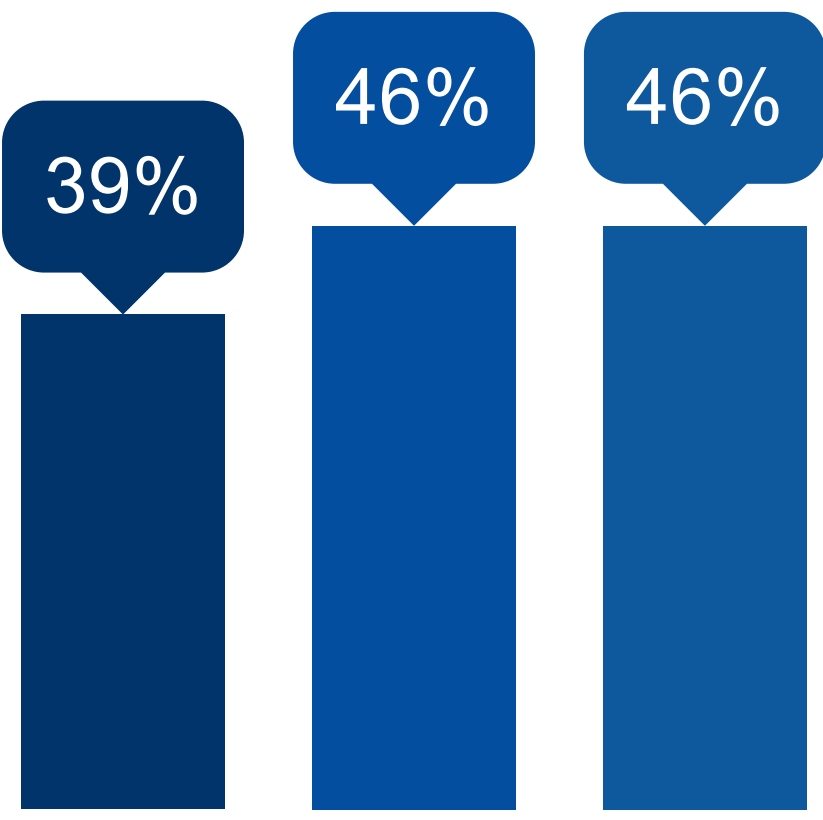
## Employment growth

Reported increase in employment in last 12 months:



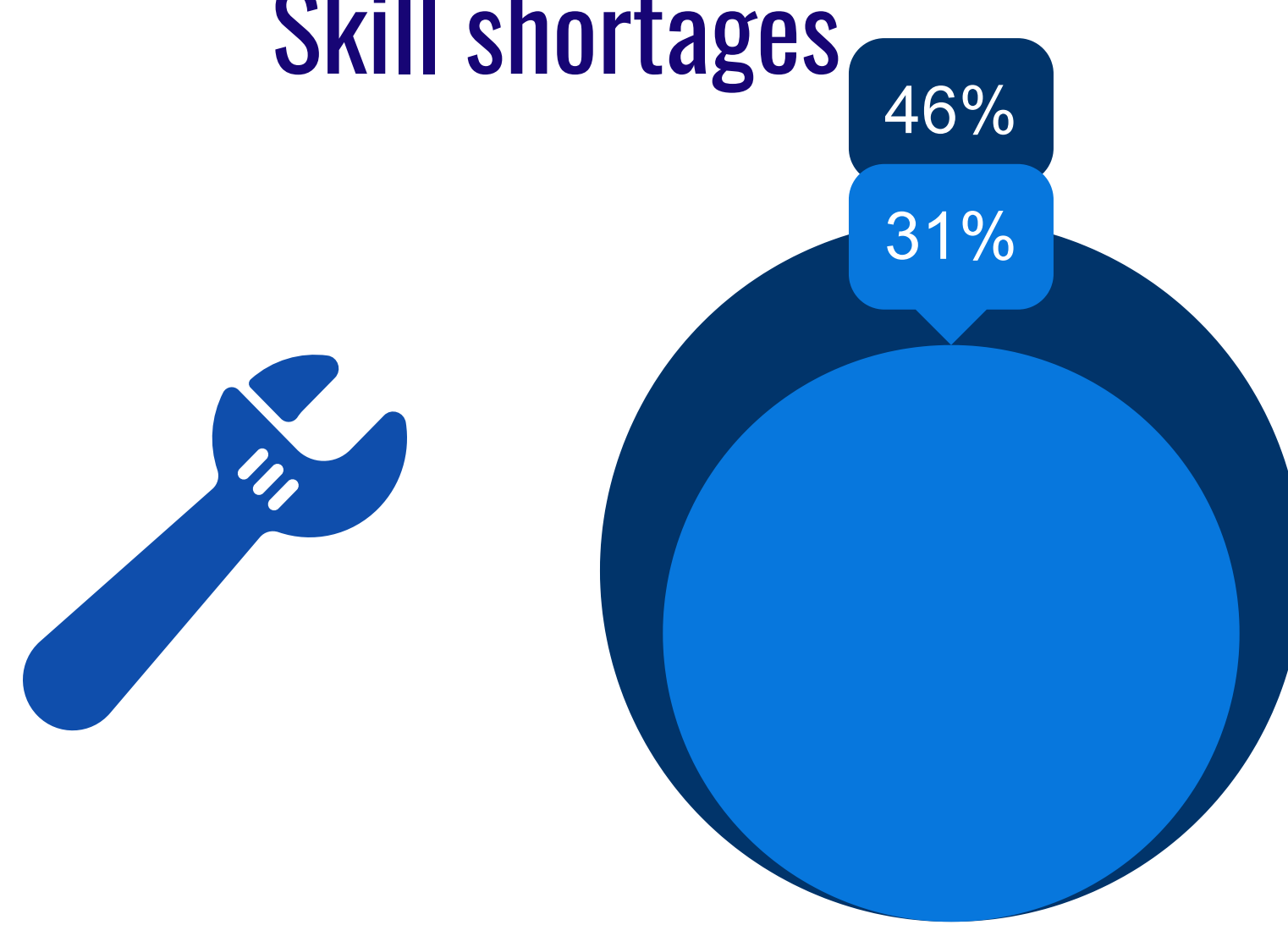
2014 2016 2018

Tried to recruit:



2014 2016 2018

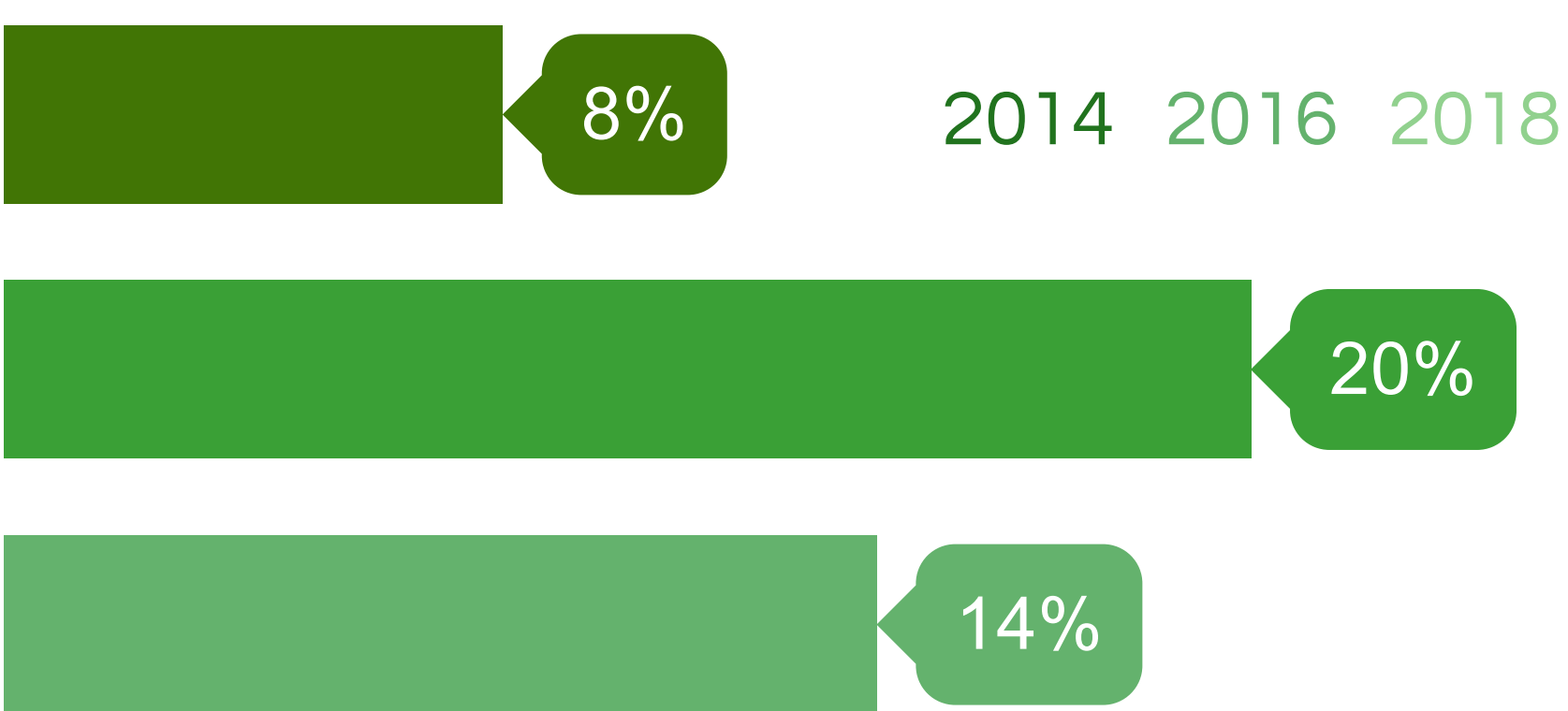
## Skill shortages



tried to recruit experienced difficulties

construction:  
**21%** carpenter  
**19%** bricklayer  
 professional services:  
**10%** architect  
 Applicants lack:  
 Skills, 73%;  
 Work experience, 59%;  
 Attitude/motivation, 48%;  
 Qualifications, 45%

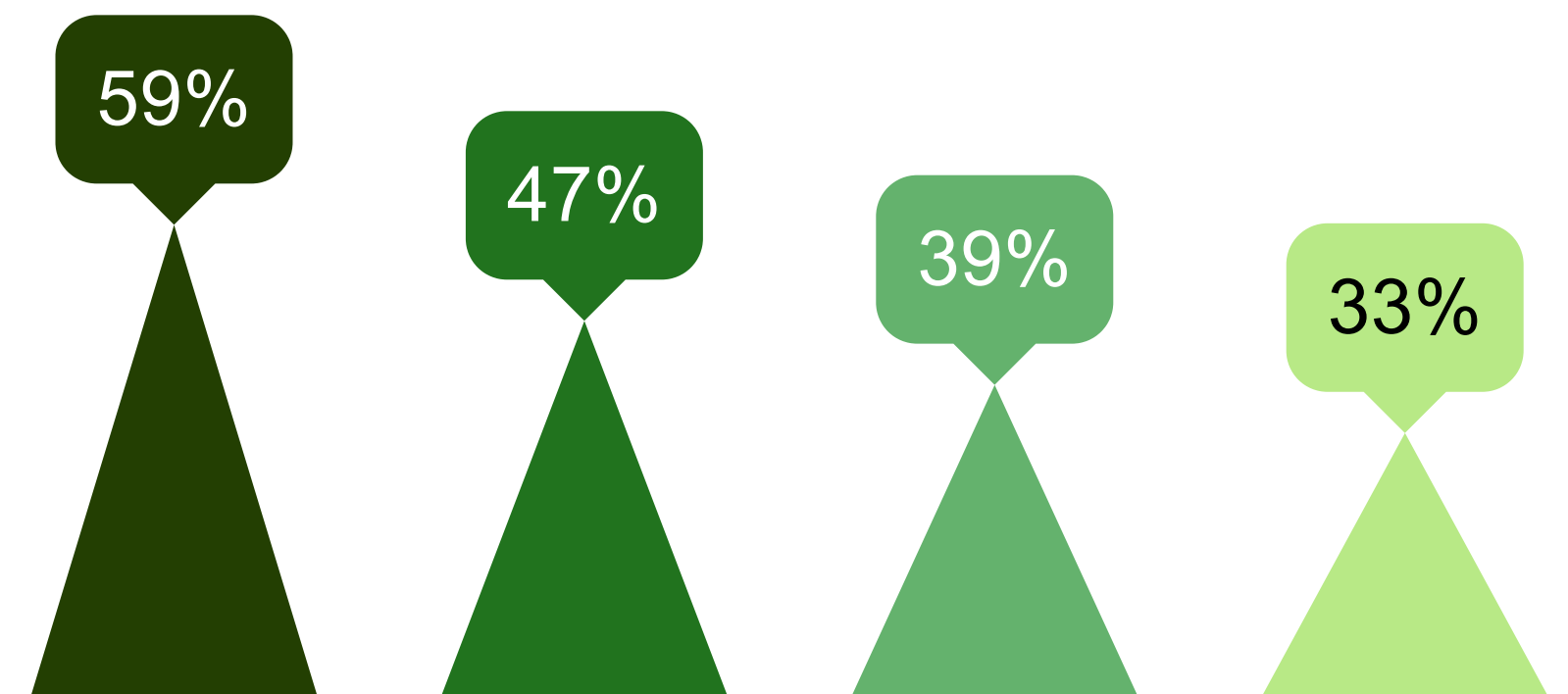
## Skill gaps within workforce



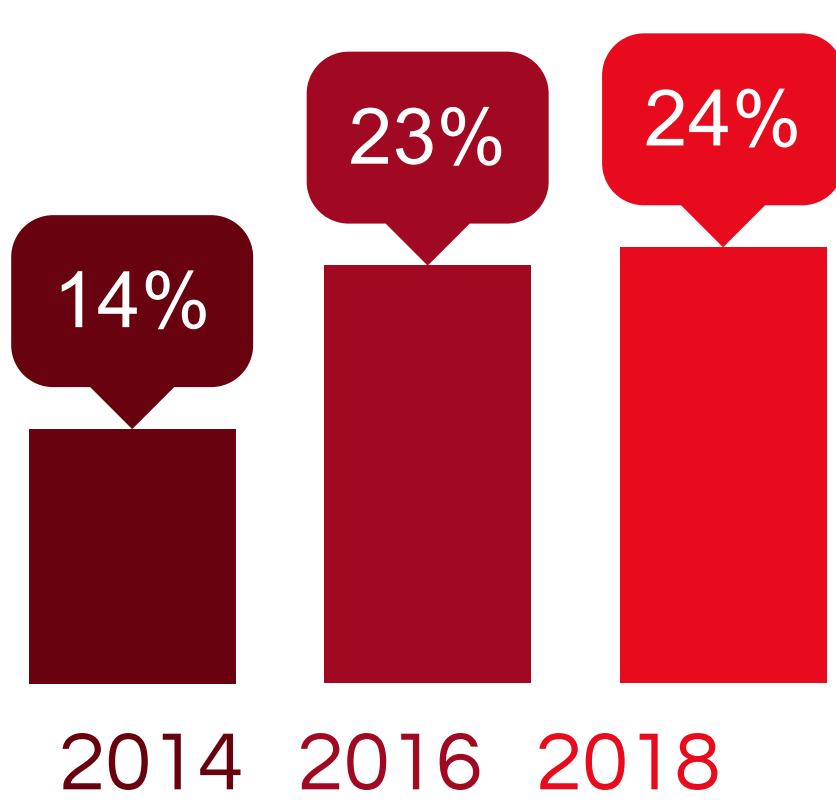
Trend reflects recruitment rate...now slowing...

## Any training: 2014, 57%; 2016, 64%; 2018, 67%

Off the job; on the job; both on and off the job; no training



## Currently have apprentices:

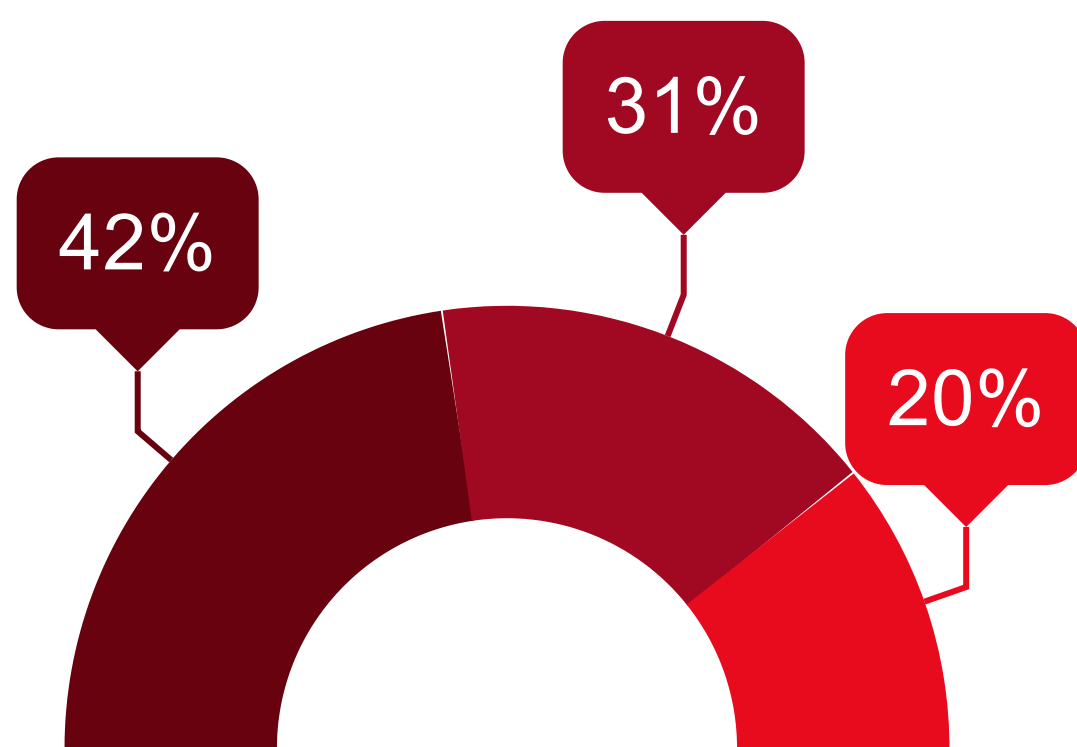


2014 2016 2018



## Apprenticeships (in construction)

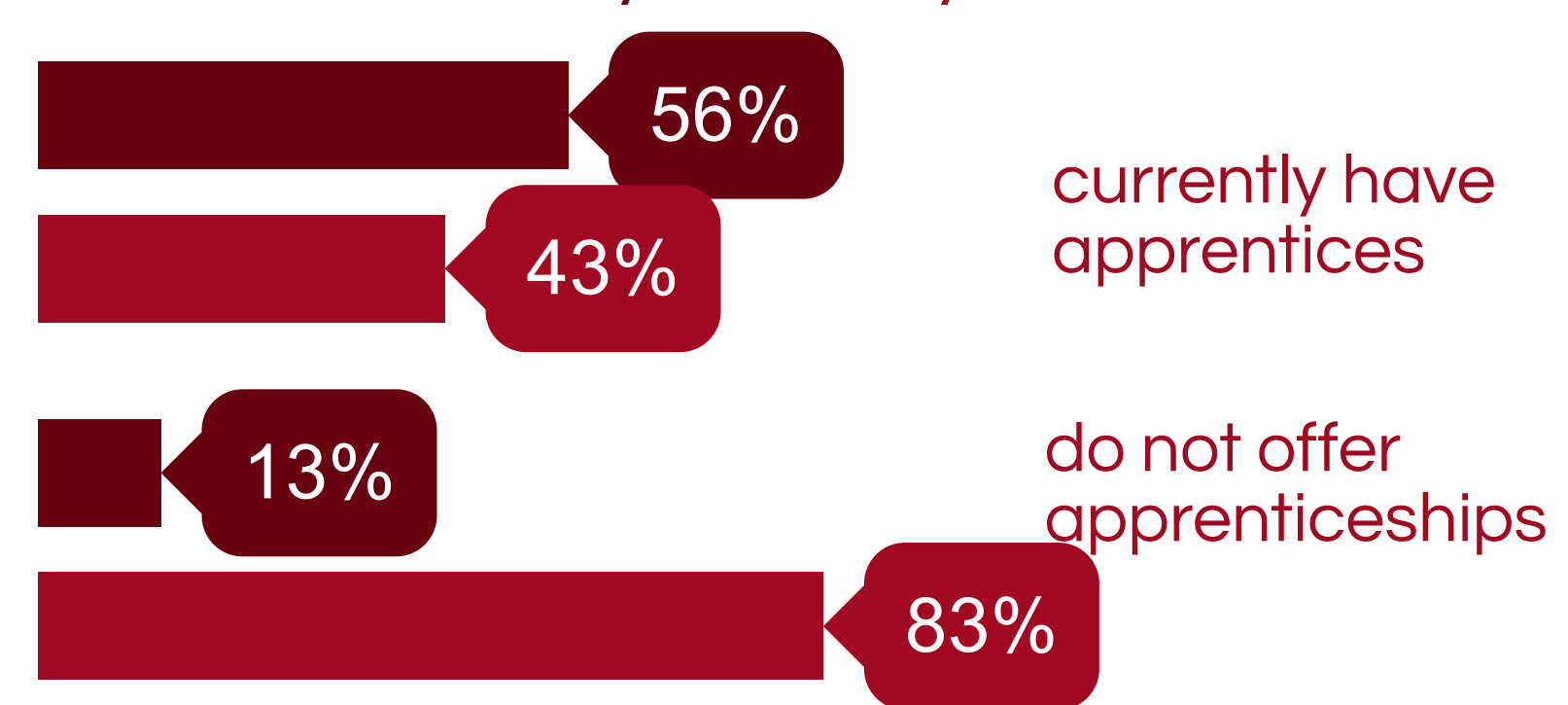
Perceived benefits:



enables training to be moulded to business needs;  
 improves/maintains skill levels;  
 improves productivity

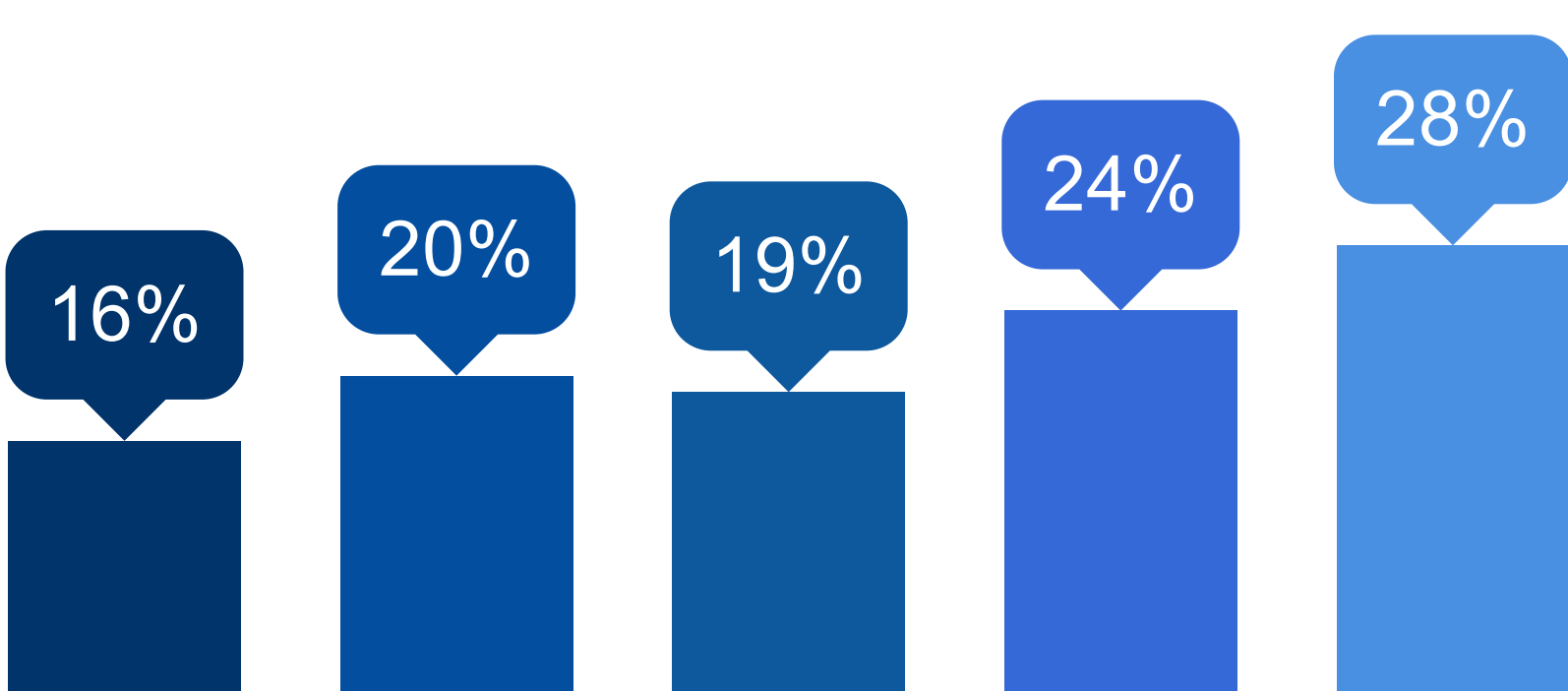
Likelihood of offering in the next 12 months:

likely unlikely



## Migrant workers

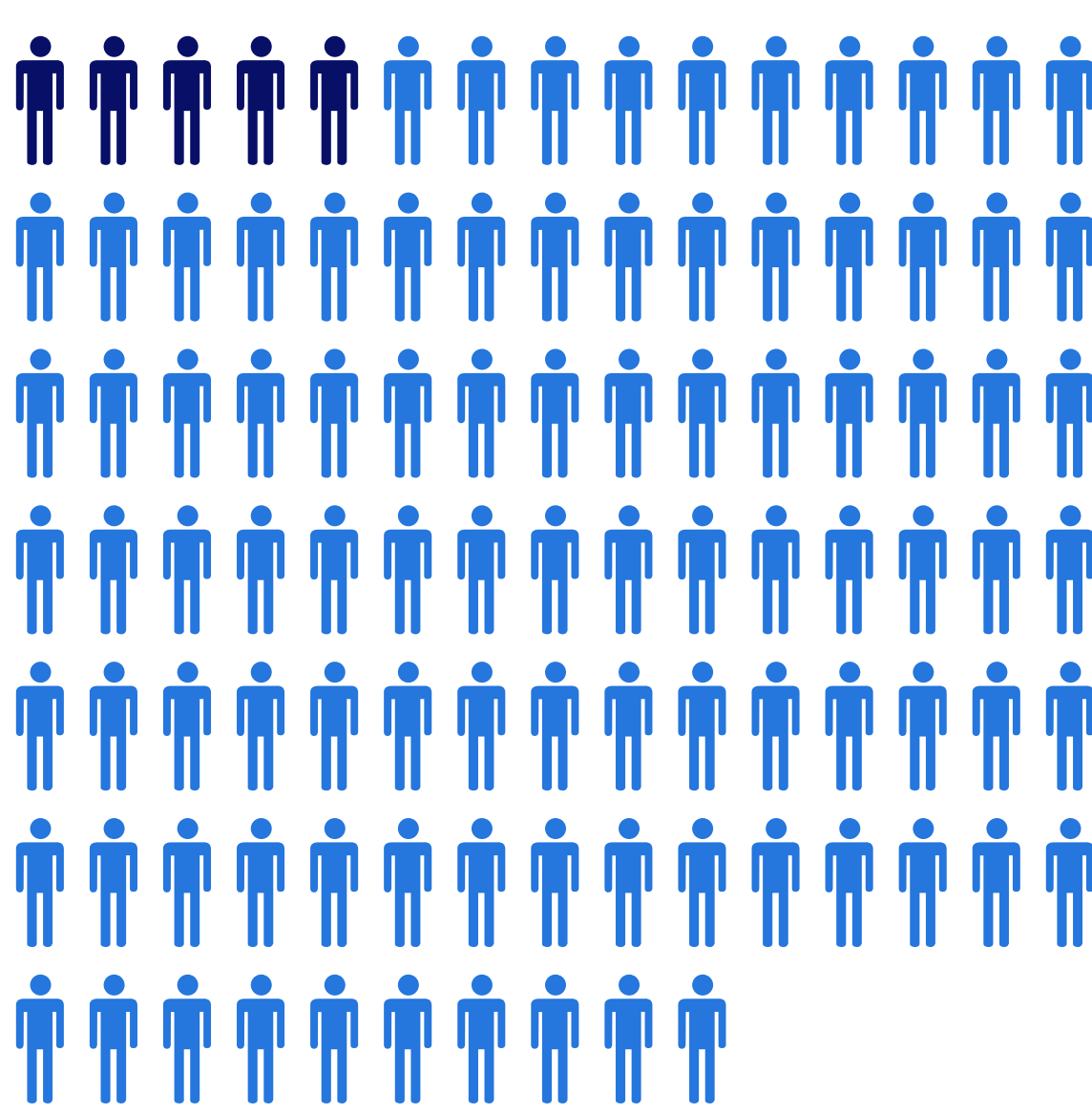
Employ any:



All employers; have skill shortages; need to up-skill; workforce has grown; 10+ employees



% of workforce that are migrant workers:



migrant workers non-migrant workers



11% only employ EU migrant workers  
 83% employ both EU and non-EU workers

have tried to recruit migrant workers to address...

Recruitment difficulties  
 Skill gaps

