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Skills and Training in the Construction Industry 2018

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1. Executive Summary

Introduction

- In January 2018, the CITB commissioned this skills and training survey. The survey broadly replicates similar surveys conducted in summer 2009, early 2011, early 2014 and summer 2016. The survey aims to determine skill needs and training practices amongst both self-employed individuals and employers working in the construction industry across the UK.

- Telephone interviews with 1,091 employers (in establishments in which at least 2 people worked) and 122 self-employed individuals in the construction sector were achieved.

- In addition, targets were set for the numbers of interviews in each home nation such that a minimum of 85 interviews were conducted in each of Scotland (88), Wales (88), and Northern Ireland (85). The remaining 952 interviews (77% of the sample) were conducted in England. Within England, further stratification of the sample ensured appropriate representation of the distribution of employers and self-employed businesses across the nine government office regions.

- At the analysis stage, the data was weighted to accurately represent the total population of construction businesses in the UK.

Industry structure

- The majority of businesses with employees (87%) employ fewer than 10 staff at their site. Most of the remainder (9% of all employers) employ between 10 and 24 staff. Only one in twenty employers (5%) employ 25 or more staff at their site, including 1% that employ at least 100 staff.

- Three-quarters of businesses with employees (74%) operate within the construction sector, with the remainder (26%) operating within professional services.

- Three-fifths of businesses with employees (60%) have contractor/agency/self-employed workers currently working for them.

Output constraints

- Labour shortages are most frequently mentioned as a constraint to business sales and output (13% of employers), continuing the upward trend in this as a concern since 2014. Insufficient demand/uncertainty in the economy continues to be relatively significant as a concern (10%) but is less frequently mentioned than in 2016.

- Overall, around a half of both employers and the self-employed (49% and 56% respectively) did *not* perceive any constraints on their business. This is a similar picture to 2016, which also suggests little perceived change in the economic environment for construction businesses in the last two years.

- In terms of *anticipated* constraints on output in the next 12 months, insufficient demand/uncertainty in the economy is the most likely to be mentioned, with labour shortages next most frequently mentioned.

- The majority of employers reported no change in the number of staff employed in the last 12 months (62%) but, if there had been change, this was more likely to be positive rather than negative: 25% of business reported an increase while 11% reported a decrease. There has been little change in these trends over the last two years.

A continuing tight labour market

- One in six employers (17%) reported that, for *some* of the last year, they have not had enough skilled workers and a further 9% reported that for *all or most* of the last 12 months they had not had enough skilled workers. Both these proportions are similar to 2016 (18% and 8% respectively).

- More than two-fifths of employers (46%) have tried to recruit skilled labour directly during the last 12 months. This is the same proportion as reported in 2016.

- Just over two-fifths of employers (42%) have turned work down in the last 12 months as a consequence of lacking skilled workers. This proportion is significantly higher amongst construction than professional services businesses (46%, compared with 33%).

- Two-fifths of employers (39%) have actually recruited staff in the last 12 months. Again, this is a similar proportion to that reported in 2016.

- Nearly half of employers that have tried to recruit skilled staff have experienced difficulties in filling the positions (47%). This represents no change since 2016. This equates to 31% of all employers. There has been a strong upward trend in the incidence of hard-to-fill vacancies since 2011 (21% in 2011 to 36% in 2014 to 47% in 2016 and 2018).

- The most frequent recruitment difficulties for businesses within the construction sector were for carpenters/joiners and bricklayers; while professional services businesses were most likely to have difficulty recruiting architects.

- The most frequently cited cause of hard-to-fill vacancies is that applicants lack the skills required (73%), while not enough young people being trained in the construction industry is also a significant cause (64%). Both were also the most common causes of recruitment difficulties in 2016.

- Experience and knowledge is the most frequently mentioned scarce resource amongst job applicants (33%), with personal skills, such as attitude, motivation and common sense remaining important, as they were in 2016 (28%).

- Recruitment difficulties have had an impact on 92% of employers that have reported them. This impact is most likely to have been the increased use of overtime and higher workloads for existing staff (61%).

- More than half of employers that have had hard-to-fill vacancies report having lost business or turned down bidding for work (52%), or cite an increase in operating costs (also 52%).

Skill gaps

Skill gaps are present but not extensive and are less common than in 2016.

- Fourteen per cent of businesses said they had skill gaps in their existing workforces. This figure compares with 20% in 2016 and 10% of employers within the construction sector who said, in UKCES' Employer Skills Survey of 2017, that they had skill gaps.

- Among workers, skill gaps most commonly affect other engineers (9%), building service engineers (8%), technicians (8%) and architectural technologists (8%), all within the professional services sector. Among the self-employed, architects are most likely to have skill gaps (24%).

- The most frequently cited area identified as lacking in terms of skills is experience (or knowledge) (27% of those with skill gaps).

- When asked about the impact of skill gaps on business performance, just 19% of employers report that they have had a major impact, with 45% of employers reporting that the impact has been minor.

- The majority of employers (66%) with skill gaps are increasing training activity in order to overcome these gaps.

- The most frequent driver of new skills and knowledge among employers is new legislative or regulatory requirements (57%) closely followed by the introduction of new technologies or equipment (49%) and the introduction of new working practices (48%). These drivers have changed little since 2011.

- Among employers in the construction sector, managers/directors are the occupation group most likely to be affected by the need to acquire new skills or knowledge (16%); among those in professional services, architects are most likely to be affected (17%).

- The areas in which skills and/or knowledge are most frequently reported as needing improving or updating as a result of the drivers are legislation/regulations (27%), technical/trade-specific skills (27%) and health and safety/first aid (26%).

- One in six employers currently directly or indirectly employs any migrant workers (16%). Directly employed migrant workers are estimated to make up 5% of the directly employed workforce and indirectly employed migrant workers make up 14% of the indirectly employed workforce.

- Just over a fifth of employers that have experienced recruitment difficulties in the last 12 months have recruited or tried to recruit migrant workers to fill these posts (22%).

- One in seven employers identifying skill gaps have recruited or tried to recruit migrant workers to obtain the skills their workforce are lacking (14%).

Trends in training

The proportion of employers which train their staff has increased and other training indicators are positive.

- Two-thirds of all employers (67%) have funded or arranged any training, on or off-the-job, informal or formal, for any staff in the last 12 months.

- This is a higher proportion than reported in 2016 (64%) and among construction businesses in the UK-wide 2017 Employer Skills Survey (UKCES) (59%).

- Employers who provide training were asked about changes in their training in the last 12 months. Across a series of indicators, positive changes from 2011 to 2014 to 2016 and to 2018 were observed. Proportions of workforces trained, training expenditure per trainee, and the amount of training that has led towards recognised qualifications all increased.

- More particularly, 47% of employers have funded or arranged *on-the-job* training for any staff in the last 12 months, compared with 43% in 2016.

- On average, employers provided each person trained with 6 days on-the-job training last year. This compares with 16 in 2016, which suggests that training, while funded and arranged by more employers in 2018, is on a smaller scale than two years ago.

- Fifty-nine per cent of employers had funded or arranged *off-the-job* training for staff in the last 12 months, compared with 53% in 2016. On average, employers provided each trainee who trained off-the-job with 7 days off-the-job training last year. This is a similar figure to that reported in 2016 (6 days).

- As in 2016, training is most likely to have been provided by private training providers and internally, by staff. There was a higher incidence of training provided through an industry federation or body in 2018 than in 2016. This has been on an upward trend since 2014.

- Of employers that provided training in the last 12 months, 42% provided training towards a nationally-recognised qualification. This is the same proportion as in 2016.

- Three-fifths (59%) of employers that funded or arranged training in the last 12 months formally assess whether the training and development received has an impact on the trainee's performance. This is a similar proportion to that reported in 2016 (61%) and 2014 (60%).

- More than a third of employers *that funded or arranged any training in the last 12 months* (37%) reported that they would have provided more training if they had been able to do so. This is a lower proportion than in 2016 (50%).

- Lack of funds (51%) and lack of staff time (44%) are the main reasons for these employers not providing more training.

- Respondents who had *not funded or arranged training in the last 12 months* were asked for the reasons why they have not done so. The main reason given was that all staff are fully proficient (57%).

Apprenticeship

There has been an increase in support for Apprenticeship in the last two years.

- Nearly one in four employers in the construction sector (24%) currently has staff undertaking Apprenticeships. This is a similar proportion to that reported in 2016 (23%).

- One in seven construction employers (15%) offer Apprenticeship opportunities but do not currently have an apprentice. This is the same proportion as reported in 2016.

- The most frequently cited reason for offering Apprenticeships is business needs (36% of employers that offer them), while the most frequently cited perceived benefit to doing so is that it enables employers to train people the way they want to and mould them to how the business operates (42%).

- More than a quarter of all construction employers (28%) said it was likely that they would take on someone on an Apprenticeship in the next 12 months. This includes 14% that consider the possibility as very likely.

- More than half the employers that currently have Apprentices (56%) consider it likely that they will take on new Apprentices in the next 12 months.

- Compared with 2019, there is a slight increase in the proportion of employers who are *not* currently offering Apprenticeships that consider it likely they will start to offer Apprenticeships in the near future (19% in 2018, 16% in 2016).

- Employers in the construction sector that offer Apprenticeships were asked if the number of Apprentices and new trainees recruited has changed in the last 12 months.   Three in ten (30%) reported that the number has increased, while just 14% reported that the number has decreased.

- The positive trends in the extent to which Apprenticeships are offered noted have continued since 2014.

2. Background

Aims and objectives

In January 2018, the CITB commissioned this skills and training survey. The survey broadly replicates similar surveys conducted in summer 2009, early 2011, early 2014 and summer 2016. The survey aims to determine skill needs and training practices amongst both self-employed individuals and employers working in the construction industry across the UK.

Scope

The survey's basic themes are recruitment difficulties and skill shortages, skills deficiencies and gaps in established workforces and amongst self-employed individuals, and training and development activity.

Where possible, results are benchmarked against findings from the previous skills and training surveys in 2016 and 2014 (the earlier surveys judged as too long ago to provide a sensible comparison), as well as against findings from the nationwide Employer Skills Survey 2017 which is undertaken by the Department for Education (DfE).

Methodology

In order to meet the research aims and objectives to provide a comprehensive picture of skills and training within the industry a quantitative survey of sector employers and of self-employed individuals currently working in the construction industry was undertaken.

Sampling

Using IDBR[1] data as a guide, samples of 1,091 employers and 122 self-employed individuals in the construction sector (as defined by a series of 2-digit SIC codes) were achieved. For the employer sample, establishments in which at least 2 people work were included in the survey. Size of business was a key consideration in sampling, with targets set within each of four employer size bands (2-9, 10-24, 25-99, and 100+ employees). The proportion of interviews in each size band was guided by the distribution evident in the IDBR but with deliberate over-representation of larger businesses. This was to ensure that the sample contained an adequate number of these relatively rare businesses. The sample was also stratified according to two broad industry sub-groups, construction and professional services, in a ratio of 79:21 interviews respectively. This approach replicates the approach used in previous surveys (2011, 2014 and 2016). The following table shows a breakdown of the achieved sample by 2-digit SIC and employer size:

[1] Inter-Departmental Business Register, the UK government's 'official' record of enterprises

Sector and size of employers surveyed; interviews achieved

SIC code	Number of employees					
	Self-employed	2-9	10-24	25-99	100+	Total
Construction	**75**	**362**	**209**	**215**	**59**	**846**
41 – Construction of buildings	28	142	56	43	12	**253**
42 – Civil engineering	5	29	34	29	15	**107**
43 – Specialised construction activities	42	192	119	143	32	**486**
Professional Services	**47**	**116**	**39**	**63**	**26**	**245**
71 - Architectural and engineering activities; technical testing and analysis	42	99	36	58	25	**218**
74 - Other professional, scientific and technical activities	5	17	3	6	1	**27**
Total	**122**	**479**	**249**	**278**	**85**	**1091**

In addition, targets were set for the numbers of achieved interviews in each home nation such that a minimum of 85 interviews were conducted with employers and self-employed individuals in each of Scotland, Wales, and Northern Ireland. The actual number achieved was 85 in Northern Ireland, 88 in Scotland and 88 in Wales. The remaining 952 interviews (77% of the sample) were conducted in England. Within England, further stratification of the sample ensured the appropriate representation of the distribution of employers and self-employed businesses across the nine government office regions (as indicated by IDBR data).

At the analysis stage, the data was weighted to accurately represent the total population of construction businesses in the UK. The employer (2+ employee establishments) and self-employed samples were weighted separately. Further details on the weighting process can be found in appendix 1 of this report.

Contact details for businesses were sourced from Experian's commercial database of establishments.

Statistical confidence

The standard error associated with a given sample estimate is not determined by the size of the population being observed (providing the population is reasonably large), but by the size of the sample itself. In practice, once a sample size exceeds 100 cases (whatever the size of the total population) it is likely to deliver an acceptable degree of accuracy provided it is a random sample.

The samples generated in this research have the following maximum standard errors at the 95% level of confidence:

- Survey of 122 self-employed individuals: maximum standard error of +/-8.9%[2].
- Survey of 1,091 employers: maximum standard error of +/-3.0%[3].

Unless stated otherwise, all findings reported are statistically significant, whether reported as a comparison with previous surveys or whether a finding for a sub-group is compared with the overall total (minus that sub-group).

Questionnaire design and administration

The questionnaire was designed by BMG and signed-off by the CITB. All interviews were undertaken between 7th March 2018 and 18th May 2018 and were administered by BMG's in-house call-centre using the Computer Assisted Telephone Interviews (CATI) technique. All survey interviews were designed to take no more than 20-25 minutes to complete. Potential respondents were called on a range of days and times and on up to 10 occasions before being recorded as a non-respondent.

Presentation of survey data in the report

Individual question bases are provided on the graphs and charts in this report. Cross-tabulations were undertaken, based on key variables such as employer sector, size, and nation. Independent t-tests[4] were conducted at the 95% confidence level[5] to identify where differences between groups were statistically significant.

Most data used in this report are rounded to the nearest whole percentage. For this reason, on occasion, data in tables or charts may not add up exactly to 100 per cent.

Data relating to employers' responses to key questions by nation and English region is included in appendix 2 and 3 of this report respectively.

Question numbers and text are referenced alongside each chart and table.

The report

The remainder of the report now sets out research findings.

[2] This means that in 95% of cases the true value for any binomial response will fall into a maximum of between +/-8% of that observed. So, for example, if 50% of respondents agree, it can be stated that 95% of the time the true value will lie between 42% and 58%.

[3] This means that in 95% of cases the true value for any binomial response will fall into a maximum of between +/-3% of that observed. So, for example, if 50% of respondents agree, it can be stated that 95% of the time the true value will lie between 47% and 53%.

[4] A T-test is a statistical test performed to determine if groups of data are significantly different from each other

[5] Confidence levels are used to indicate the reliability of an estimate

3. Profile of businesses and workforces

Self-employed individuals

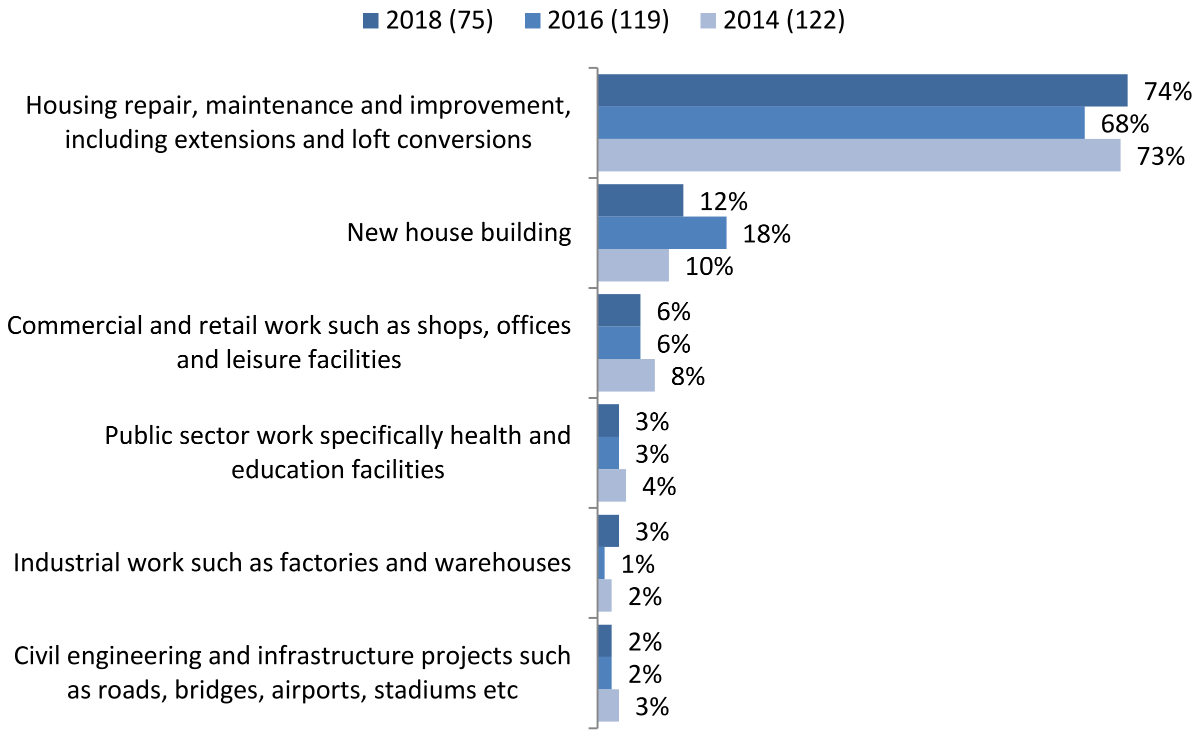
122 interviews were conducted with businesses with no permanent or directly employed staff other than the owner/manager (a self-employed individual).

Sector profile (self-employed)

Three-fifths of self-employed individuals within the sample (65%) operate within the construction sector, with the remainder (35%) operating within professional services.

The majority of self-employed individuals within construction (74%) describe most of their business in the last 12 months as coming from housing repair, maintenance and improvement, including extensions and loft conversions. This is a higher proportion than in 2016, though not statistically significant (68%). One in eight self-employed individuals work mainly in new house building (12%), which is lower than in 2016 (18%) and closer to the figure reported in 2014 (10%).

Figure 1: Self-employed individuals' main business area within the construction sector (all self-employed individuals in the construction sector)

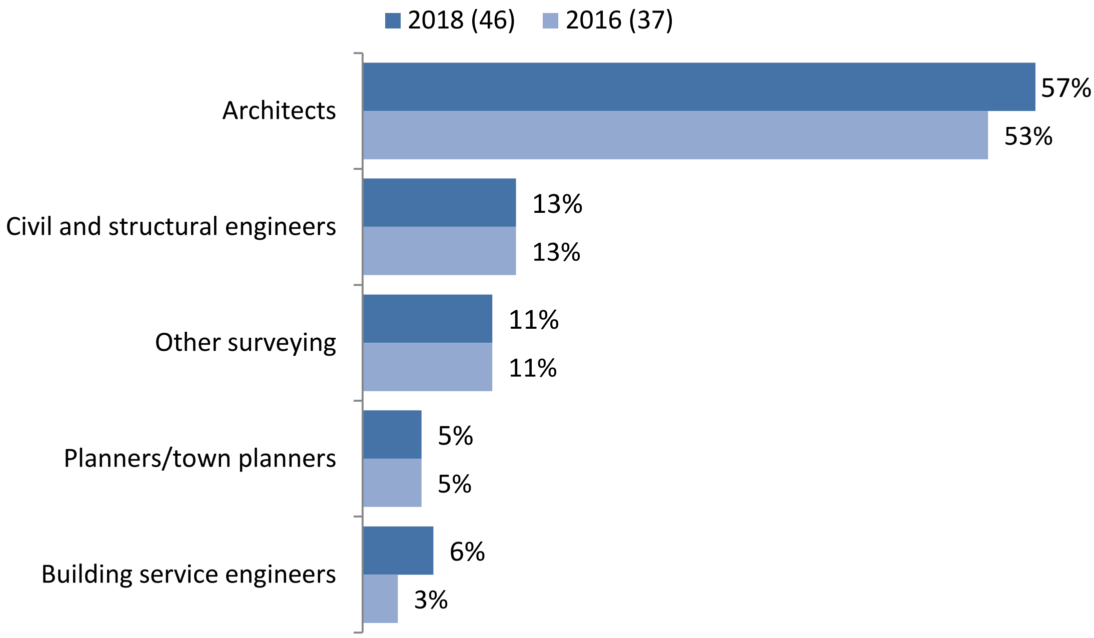


Unweighted sample base in parentheses

QA5 In which one of the following areas has most of your business been in the last 12 months? **READ OUT AND CODE ONE ONLY**

Just over half of self-employed individuals within professional services in the sample (57%) are architects, a higher proportion than in 2016, although again, this is not statistically significant (49%). One in eight are civil and structural engineers (13%), while slightly fewer are other surveyors (11%).

Figure 2: Self-employed individuals' main business area within the professional services sector (all self-employed individuals in the professional services sector)



Unweighted sample bases in parentheses

QA6 Which of the following most closely describes the main activity of this establishment? **READ OUT AND CODE ONE ONLY**

Employment of sub-contractors

Although they have no permanent, directly employed staff, around two in five self-employed individuals (43%) has contractor, agency or other self-employed staff working for them. This compares with 31% in 2016.

The mean number of contractors/agency/self-employed workers per self-employed unit was 1.4.

Employers

1,091 interviews were conducted with businesses with employees (1,091 weighted cases). These businesses have a minimum of 2 employees (that is, the owner/manager and at least 1 other employee).

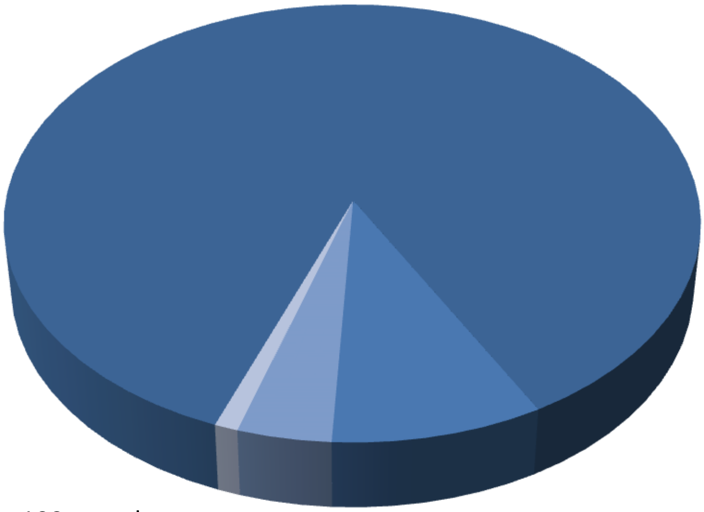
Size profile

The majority of businesses with employees (87%) employ fewer than 10 staff at their site. Most of the remainder (9% of all with employees) employ between 10 and 24 staff.

Only 5% employ 25 or more staff at their site, including 1% that employs at least 100.

The profile by business size has changed little since 2014.

Figure 3: Number of employees at that site (all businesses with employees)



Unweighted sample base in parentheses

QA1 Including yourself and any working proprietors, but excluding any contractor, agency or self-employed workers, how many people are on the payroll at this location? **PROMPT FOR A BEST ESTIMATE, WRITE IN**

The national profiles by business size are similar although there are significantly fewer employers than average across the UK in Northern Ireland within the 2 to 9 employee size band (76%) and significantly more in the 10 to 24 employee size band (17%).

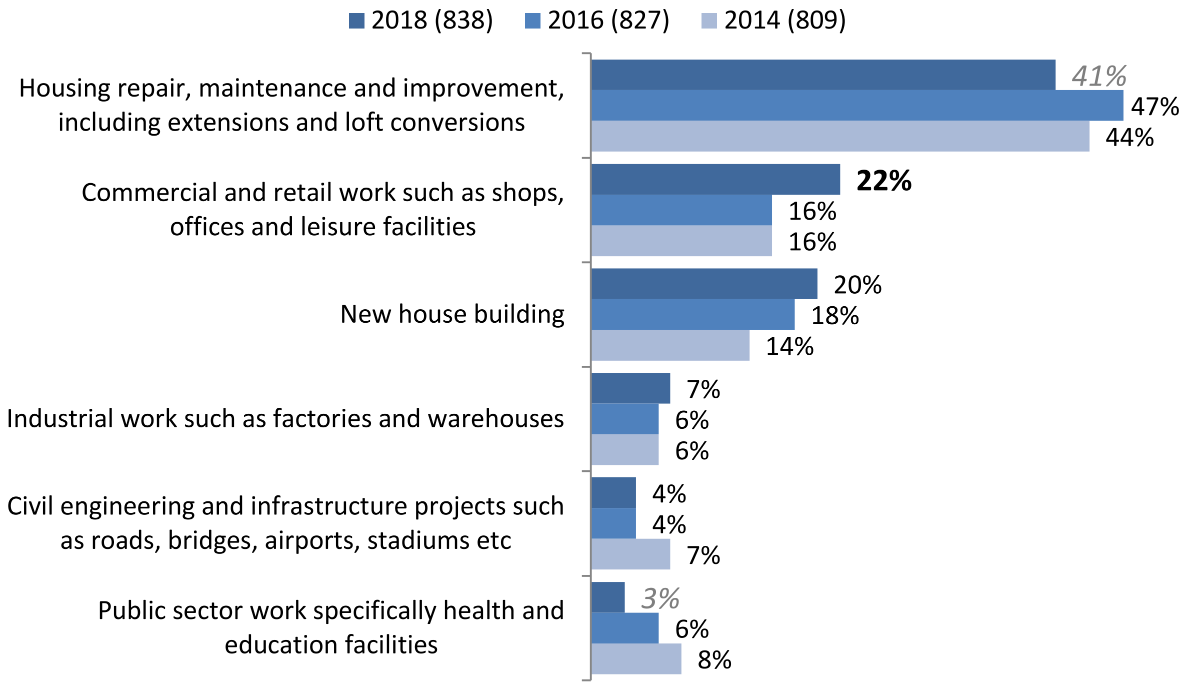
Sector profile

Three-quarters of businesses with employees (74%) operate within the construction sector, with the remainder (26%) operating within professional services.

Two-fifths of businesses with employees within construction (41%) describe most of their business in the last 12 months as coming from housing repair, maintenance and improvement, including extensions and loft conversions. This is a lower proportion than in 2016. Since 2016 there has been an increase in businesses working mostly in commercial and retail facilities (22%, 16% in both 2016 and 2014).

By nation, significantly fewer businesses mainly undertake commercial and retail work in Scotland (8%, compared with 23% in England; 32% in Northern Ireland and 29% in Wales). Scotland has a higher proportion of businesses operating in the housing repair sub-sector than average (53%).

Figure 4: Employers' main business areas within the construction sector (all construction sector businesses with employees)



Unweighted sample base in parentheses

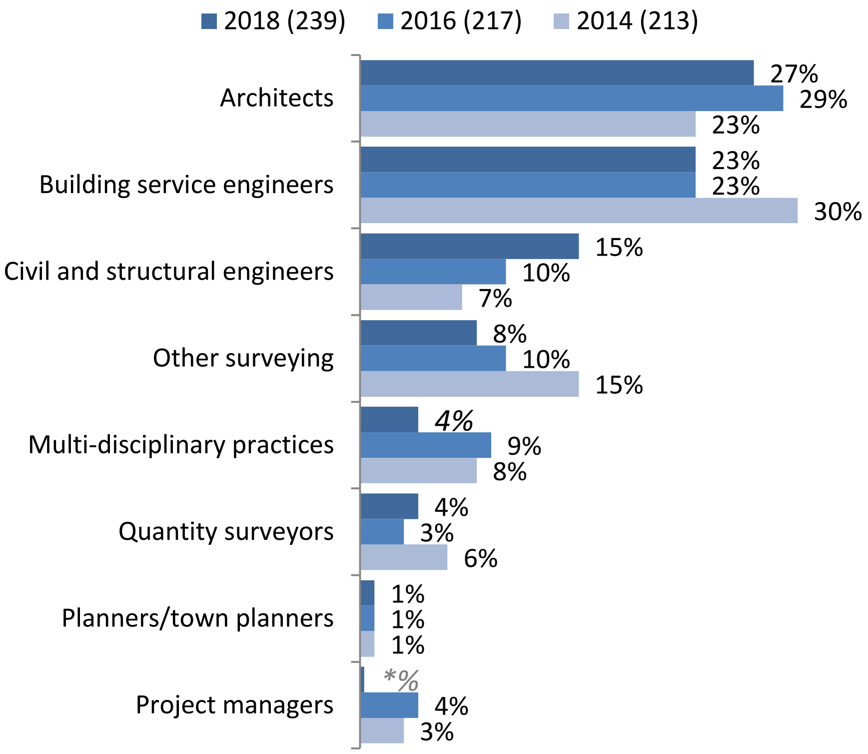
Figures in bold font are significantly higher than against the comparison years; those in italics are significantly lower than against the comparison years

QA5 In which one of the following areas has most of your business been in the last 12 months? **READ OUT AND CODE ONE ONLY**

There are differences by business size, with larger businesses significantly more likely to be mainly involved in new house building (29% of businesses with 25-99 employees; 33% of those with 100+ employees), and civil engineering and infrastructure projects (7% of businesses with 10-24 employees; 8% of businesses with 25-99 employees; 16% of those with 100+ employees). Few larger businesses work mainly in the area of housing repair, maintenance and improvement (14% of businesses with 25 or more employees; 43% of businesses with 2-9 employees), while public sector work is more likely to be undertaken by businesses with between 10 and 99 employees (10% of businesses with 10-24 employees; 9% of those with 25-99 employees).

Just over one in four employers in professional services (27%) are architectural practices, while nearly one in four are building service engineers (23%). There has been an increase in civil and structural engineers since 2016 (15%; 10% in 2016; 7% in 2014), while there has been a decrease in multi-disciplinary practices (4%; 9% in 2016; 8% in 2014), as well as in project managers (less than 1%; 4% in 2016; 3% in 2014).

Figure 5: Employers' main business areas within the professional services sector (all professional services businesses with employees)



Unweighted sample base in parentheses

Figures in italics are significantly lower than against the comparison years

QA6 Which of the following most closely describes the main activity of this establishment? **READ OUT AND CODE ONE ONLY**

Employment of sub-contractors

Three-fifths of businesses with employees (60%) have contractor/agency/self-employed workers currently working for them. This proportion is higher than in 2016 (55%). This proportion is significantly higher within construction (66%) than in professional services (44%). It is lowest amongst businesses in Northern Ireland (47%).

The mean number of contractors/agency workers/self-employed working within businesses with employees is 7 (8 in 2016). This increases with business size:

- 5 within businesses with between 2 and 9 employees
- 9 within businesses with between 10 and 24
- 20 within businesses with between 25 and 99
- 109 within businesses with 100 or more employees

The mean number is higher in construction than in professional services (8, compared with 5).

Occupation profile of workforce

Employers were asked about the occupations employed in their business and self-employed individuals were asked about their own occupations.

Occupational groups employed in the business, by sector, are summarised in the table below.

Figure 6: Occupational groups employed – prompted, multiple response (all businesses) *denotes less than 0.5%

	Employers			Self-employed individuals		
Column percentages	All employers	Construction	Professional services	Self-employed	Construction	Professional services
Labourers and general operatives	22%	29%	1%	0%	0%	0%
Carpenters / joiners	16%	21%	*%	16%	25%	0%
Supervisors	10%	13%	2%	0%	0%	0%
Technical staff	9%	12%	0%	0%	0%	0%
Bricklayers	8%	10%	*%	9%	15%	0%
Electricians	6%	7%	2%	6%	9%	0%
Plant and machine operatives	5%	6%	1%	0%	0%	0%
Painters / decorators	4%	5%	0%	2%	4%	0%
Plumbers	4%	6%	0%	3%	4%	0%
Plasterers	3%	4%	*%	5%	7%	0%
Roofers	2%	2%	0%	2%	3%	0%
Floorers	2%	2%	0%	0%	0%	0%
Scaffolders	2%	2%	0%	1%	2%	0%
Other engineers	7%	2%	20%	1%	0%	3%
Architects	5%	*%	19%	17%	0%	48%
Technicians	5%	*%	18%	0%	0%	0%
Mechanical engineers	3%	*%	13%	*%	0%	1%
Quantity surveyors	3%	1%	9%	0%	0%	0%
Project managers	3%	*%	11%	0%	0%	0%
Architectural technologists	2%	0%	10%	4%	0%	12%
Building service engineers	2%	0%	8%	1%	0%	3%
Civil engineers	2%	0%	8%	1%	0%	3%
Town planners	1%	0%	2%	2%	0%	5%
Building surveyors	1%	0%	5%	2%	0%	5%
Landscape designers	*%	0%	*%	0%	0%	0%
Scientists	*%	*%	1%	0%	0%	0%
Managers/directors	51%	54%	42%	4%	5%	2%
HR, legal and business professionals	11%	11%	9%	0%	0%	0%

Column percentages	Employers: All employers	Employers: Construction	Employers: Professional services	Self-employed individuals: Self-employed	Self-employed individuals: Construction	Self-employed individuals: Professional services
Administrative staff	50%	49%	51%	0%	0%	0%
Staff with no one main role or who multi task	13%	14%	11%	4%	6%	0%
Unprompted additional occupations:						
Sales & marketing staff	2%	2%	1%	0%	0%	0%
Designers	2%	1%	4%	0%	0%	0%
Estimators	1%	2%	1%	0%	0%	0%
Fabricators/Welders	1%	*%	1%	0%	0%	0%
Drivers	1%	1%	*%	0%	0%	0%
Glazers	1%	1%	0%	0%	0%	0%
Ground workers	1%	1%	*%	0%	0%	0%
Builders	1%	1%	*%	0%	0%	0%
Tilers	*%	*%	0%	0%	0%	0%
Mechanics	*%	*%	0%	0%	0%	0%
Cleaners	*%	*%	*%	0%	0%	0%
Other	10%	8%	16%	40%	47%	28%
Unweighted sample bases	*1091*	*846*	*245*	*122*	*75*	*47*

QD1 EMPLOYERS: You said earlier that there were **X** directly employed staff at this establishment. How many of these are mainly employed as…? SELF-EMPLOYED: In which trade do you mainly work or operate?

The most frequently employed occupations are managers/directors and administrative staff. This reflects the fact that most businesses employ people in one or both of these occupations. More specialist construction and professional roles are concentrated in those businesses whose activities require those specialist skills and experience.

Self-employed individuals, whilst managing and performing administrative tasks within their own businesses, tend to identify themselves by their trade or profession.

Within construction, employers are most likely to employ labourers/general operatives (29%), carpenters/joiners (21%) followed by supervisors (13%) and technical staff (12%). Carpenters/joiners also account for the highest proportion of self-employed individuals within construction (25%), followed by bricklayers (15%) and electricians (9%).

Within professional services, employers are most likely to employ engineers (general) (20%), architects (19%) and technicians (18%), while nearly half self-employed individuals are architects (48%).

Looking at the proportion of employees within occupations within businesses with employees highlights the extent to which some occupations are employed in low numbers by large numbers of employers. While labourers/general operatives are employed in three in ten construction businesses (29%), they account for just one in seven employees (14%). Carpenters/joiners, while employed in a fifth of

construction businesses (21%), account for just 8% of all employees. Half of employers employ managers/directors (51%), this occupational group accounts for only 12% of employees sector-wide (construction and professional services). There is a similar picture with regard to administrative staff (50% of employers; 10% of employees across both sectors).

Figure 7: Proportion of employees within each occupational group – prompted, multiple response (all employees within businesses with employees) *denotes less than 0.5%

Column percentages	All employers	Construction	Professional services
Labourers and general operatives	10%	14%	1%
Carpenters / joiners	6%	8%	1%
Plant and machine operatives	4%	6%	1%
Electricians	4%	6%	1%
Supervisors	4%	5%	*%
Painters / decorators	3%	4%	0%
Plumbers	3%	4%	0%
Technical staff	3%	4%	0%
Bricklayers	2%	2%	*%
Roofers	2%	2%	0%
Scaffolders	2%	3%	0%
Plasterers	1%	2%	*%
Floorers	1%	1%	0%
Other engineers	5%	1%	14%
Mechanical engineers	3%	*%	9%
Civil engineers	2%	0%	7%
Architects	1%	*%	4%
Building service engineers	1%	0%	3%
Technicians	1%	*%	4%
Building surveyors	1%	0%	2%
Quantity surveyors	1%	*%	1%
Project managers	1%	*%	3%
Architectural technologists	*%	0%	1%
Town planners	*%	0%	*%
Landscape designers	*%	0%	*%
Scientists	*%	*%	*%
Managers/directors	12%	12%	9%
HR, legal and business professionals	3%	3%	3%
Administrative staff	10%	9%	12%
Staff with no one main role or who multi task	7%	6%	8%

Column percentages	All employers	Construction	Professional services
Unprompted additional occupations:			
Sales & marketing staff	1%	*%	1%
Fabricators/Welders	1%	*%	2%
Ground workers	1%	*%	1%
Builders	1%	*%	3%
Estimators	*%	*%	*%
Drivers	*%	*%	*%
Tilers	*%	*%	0%
Designers	*%	*%	*%
Glazers	*%	*%	0%
Mechanics	*%	*%	0%
Cleaners	*%	*%	*%
Other	4%	3%	7%
Weighted no. of employees	*1,374,777*	*967,169*	*407,608*

QD1 EMPLOYERS: You said earlier that there were **X** directly employed staff at this establishment. How many of these are mainly employed as…? SELF-EMPLOYED: In which trade do you mainly work or operate?

4. Output constraints

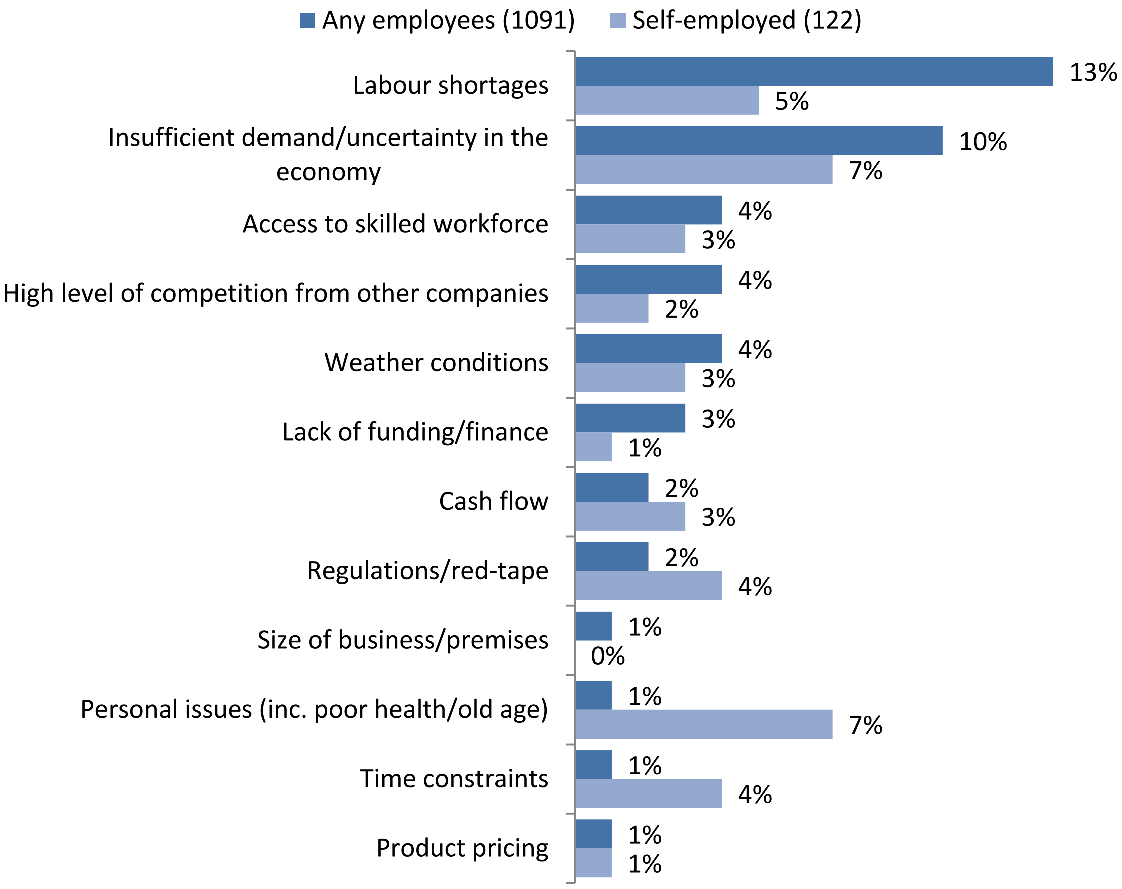
Current constraints

Respondents were asked if any factors currently limited their business's sales and output. Their responses were unprompted.

The most frequently mentioned constraints to business sales and output were labour shortages (13% of employers; 5% of self-employed) and insufficient demand/uncertainty in the economy (10% of employers; 7% of self-employed). In 2016, insufficient demand/uncertainty was the most frequently mentioned (12% of employers; 8% of self-employed), with labour shortages in second place (11% of employers and 8% of self-employed).

Overall, around half of businesses (49% of those with employees; 56% of those without) did *not* perceive any constraints on their business (at the time of the survey). This compares with 53% of those with employees and 56% of the self-employed in 2016.

Figure 8: Factors that are currently limiting sales and output (businesses with employees/self-employed individuals)



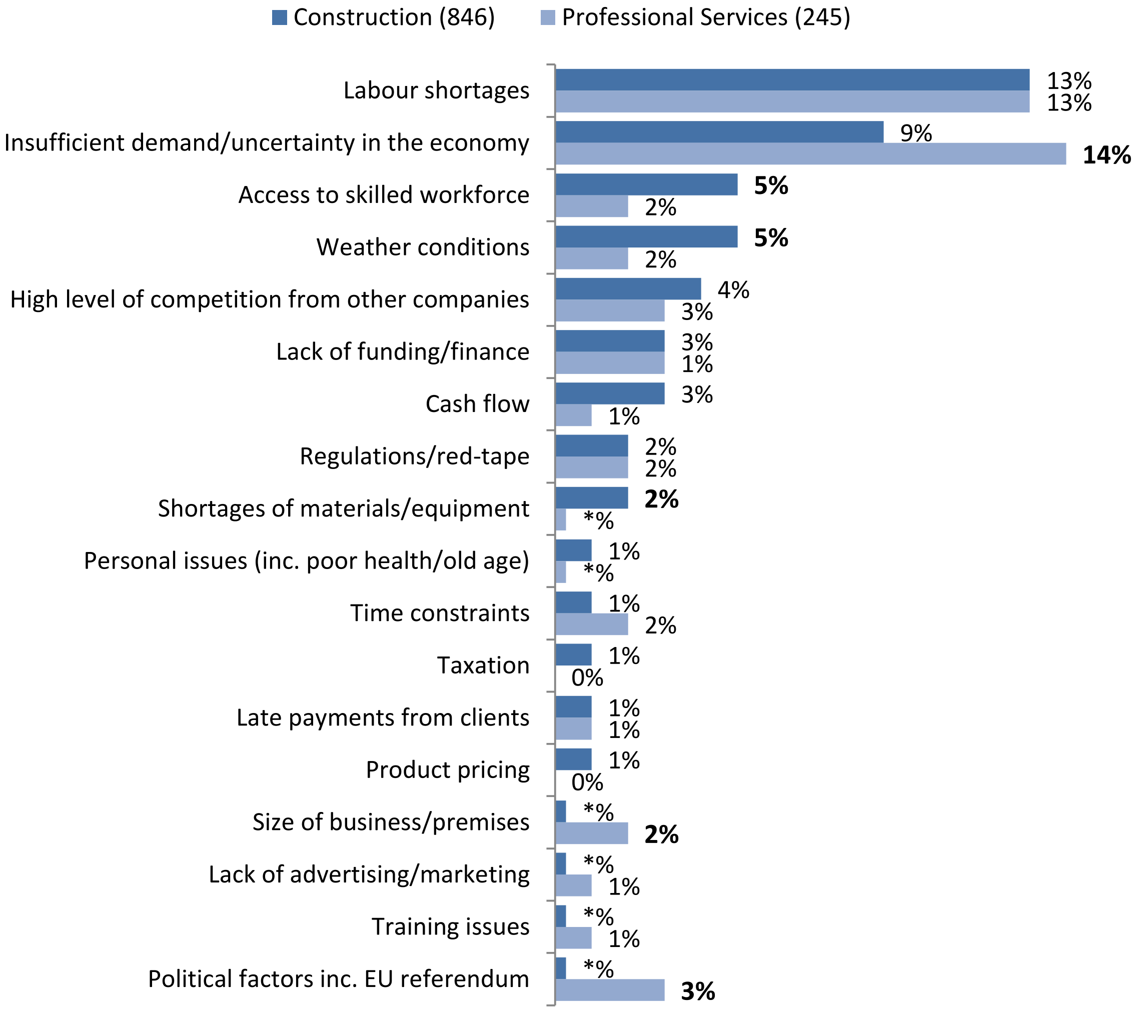
Unweighted sample bases in parentheses

Only factors mentioned by at least 1% of either sub-sample are shown

QB1 What factors, if any, are currently limiting your business? By limiting your business we mean limiting your sales and output **DO NOT READ OUT. CODE ALL THAT APPLY**

By sector, insufficient demand/uncertainty is more frequently mentioned by employers within professional services (14%) than those in construction (9%). Access to a skilled workforce and weather conditions are more frequently mentioned by construction employers than those in professional services. However, labour shortages are equally likely to be cited by construction and professional services employers.

Figure 9: Factors that are currently limiting sales and output, by sector (businesses with employees) *denotes less than 0.5%



Unweighted sample bases in parentheses

Only factors mentioned by at least 2% of either sub-sample are shown

Figures in bold font are significantly higher than against the other sector

QB1 What factors, if any, are currently limiting your business? By limiting your business we mean limiting your sales and output **DO NOT READ OUT. CODE ALL THAT APPLY**

A review of limiting factors by nation/region highlights a particularly high proportion of employers in Northern Ireland citing labour shortages (21%), while Scotland's employers are significantly more likely than average to cite insufficient demand/uncertainty in the economy (18%). As in 2016, employers in Wales are also significantly more likely to mention regulations/red tape (6%). Within England,

access to a skilled workforce is more likely than average to be a concern (4%), particularly within the West Midlands (10%). The propensity to mention any constraints is higher than average in the North East (68%) and these employers are significantly more likely than average to mention insufficient demand/uncertainty in the economy (24%) and labour shortages (24%). Labour shortages are also a particular concern within the South West (27%). Just 4% of employers in Northern Ireland mention the lack of devolved government there as a limiting factor.

The following table sets out a detailed geographical breakdown of constraints:

Figure 10: Factors that are currently limiting sales and output, by region (businesses with employees) ***denotes less than 0.5%**

	Nation					England GOR								
Column percentages	**All employers**	**England**	**Northern Ireland**	**Scotland**	**Wales**	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Labour shortages	13%	13%	**21%**	7%	10%	10%	11%	9%	**24%**	9%	11%	**27%**	16%	16%
Insufficient demand/ uncertainty in the economy	10%	9%	15%	**18%**	6%	7%	12%	7%	**24%**	9%	9%	8%	11%	10%
High level of competition from other companies	4%	4%	7%	3%	1%	5%	1%	4%	1%	4%	3%	**10%**	*%	1%
Weather conditions	4%	4%	2%	5%	7%	4%	1%	2%	6%	*%	5%	6%	6%	6%
Access to skilled workforce	4%	4%	3%	1%	0%	2%	6%	5%	6%	3%	2%	7%	**10%**	1%
Lack of funding/finance	3%	3%	1%	3%	0%	**6%**	0%	*%	0%	3%	1%	0%	**10%**	6%
Cash flow	2%	2%	0%	5%	2%	3%	1%	5%	*%	3%	2%	0%	*%	4%
Regulations/ red-tape	2%	2%	2%	*%	**6%**	1%	0%	4%	0%	2%	1%	4%	2%	6%
Shortages of materials/ equipment	1%	1%	2%	*%	0%	1%	*%	2%	**6%**	1%	0%	2%	3%	0%
Taxation	1%	1%	0%	*%	0%	2%	0%	0%	0%	0%	0%	0%	2%	0%
Size of business/ premises	1%	1%	0%	0%	*%	*%	0%	2%	0%	**3%**	0%	0%	0%	3%
Late payments from clients	1%	1%	0%	0%	**5%**	1%	0%	0%	0%	0%	3%	0%	0%	0%
Product pricing	1%	1%	0%	*%	0%	*%	0%	0%	0%	0%	3%	0%	*%	3%
Personal issues (inc. poor health/old age)	1%	1%	0%	3%	**5%**	0%	0%	0%	0%	0%	1%	2%	2%	0%

Column percentages	Nation					England GOR								
	All employers	England	Northern Ireland	Scotland	Wales	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Time constraints	1%	1%	0%	3%	0%	0%	0%	*%	0%	0%	*%	2%	3%	**4%**
Political factors inc. EU referendum	1%	1%	1%	0%	*%	0%	*%	5%	0%	*%	2%	*%	0%	0%
Political situation in Northern Ireland - lack of devolved government/ Stormont stalemate	*%	0%	**4%**	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Lack of advertising/mark eting	*%	*%	2%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%
Cost of raw materials/ equipment	*%	*%	0%	0%	0%	*%	0%	2%	0%	0%	*%	0%	0%	0%
Tendering process	*%	*%	0%	0%	0%	*%	0%	0%	0%	0%	1%	0%	*%	0%
Training issues	*%	*%	0%	0%	*%	1%	0%	1%	0%	0%	0%	0%	0%	0%
Availability of land	*%	*%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
Fuel prices	*%	*%	0%	*%	0%	0%	0%	0%	0%	0%	0%	1%	*%	0%
Other	4%	4%	4%	7%	9%	9%	3%	5%	*%	6%	1%	3%	*%	0%
Nothing	49%	50%	49%	43%	46%	52%	**66%**	47%	32%	**61%**	52%	44%	44%	44%
Don't know	3%	3%	*%	4%	6%	*%	1%	3%	7%	1%	7%	1%	2%	1%
Unweighted bases	*1091*	*857*	*77*	*82*	*75*	*148*	*78*	*107*	*46*	*90*	*134*	*105*	*78*	*71*

Figures in bold font are significantly higher than average minus the sub-group tested

QB1 What factors, if any, are currently limiting your business? By limiting your business we mean limiting your sales and output **DO NOT READ OUT. CODE ALL THAT APPLY**

Anticipated constraints

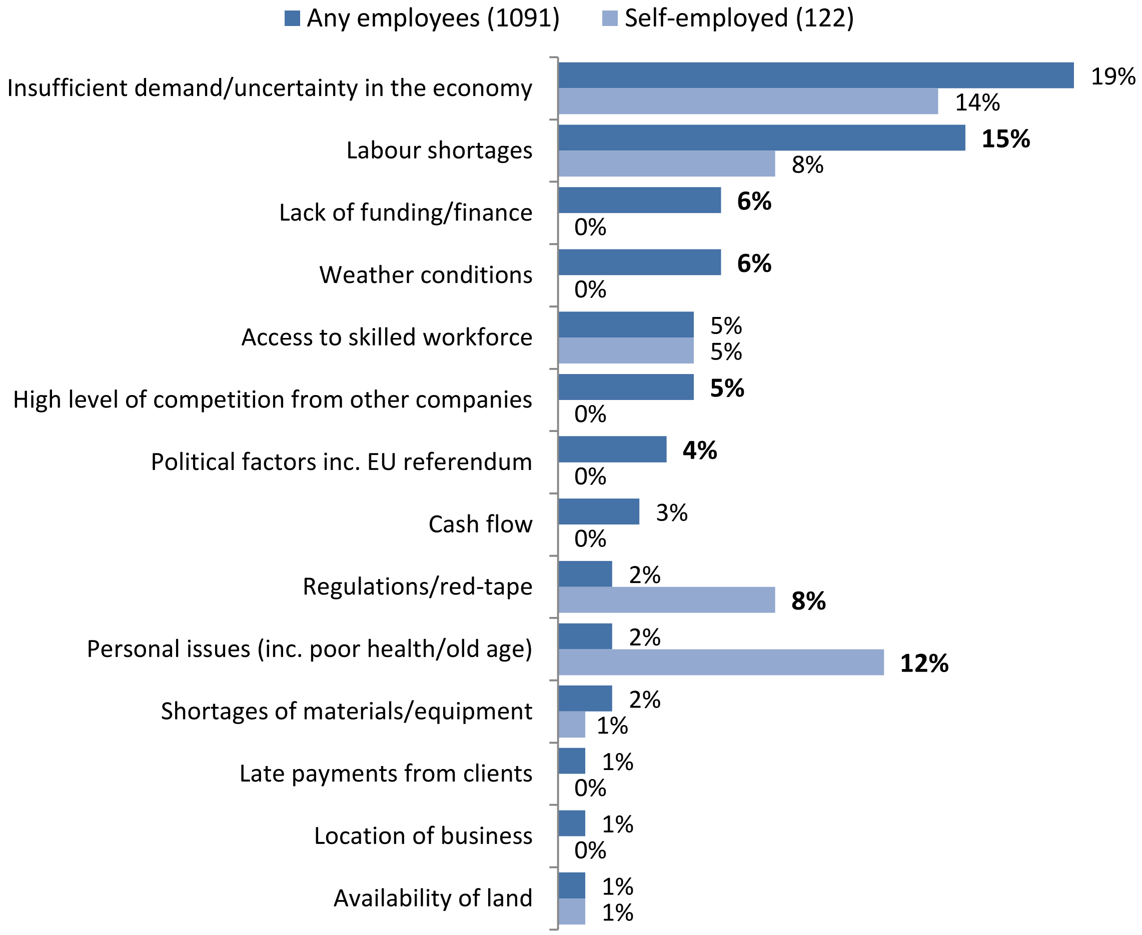
Looking forward to the next 12 months, there is a higher expectation of there being any factors likely to limit business. Two-thirds of employers (68%) and three-fifths of self-employed individuals (61%) anticipate some constraints to business in the next 12 months.

Insufficient demand/uncertainty in the economy is the most likely to be mentioned (19% of employers; 14% of self-employed individuals), but these are lower proportions than in 2016 (25% of employers; 21% of self-employed individuals).

Labour shortages are less likely to be anticipated than might be expected given the proportion identifying them in the last 12 months (15% of employers; 7% of self-employed individuals).

Compared with the outlook in 2016, both employers and self-employed individuals appear more optimistic.

Figure 11: Factors which businesses expect to limit sales and output in the next 12 months (businesses with employees/self-employed individuals) *denotes less than 0.5%



Unweighted sample bases in parentheses

Only factors mentioned by at least 1% of either sub-sample are shown

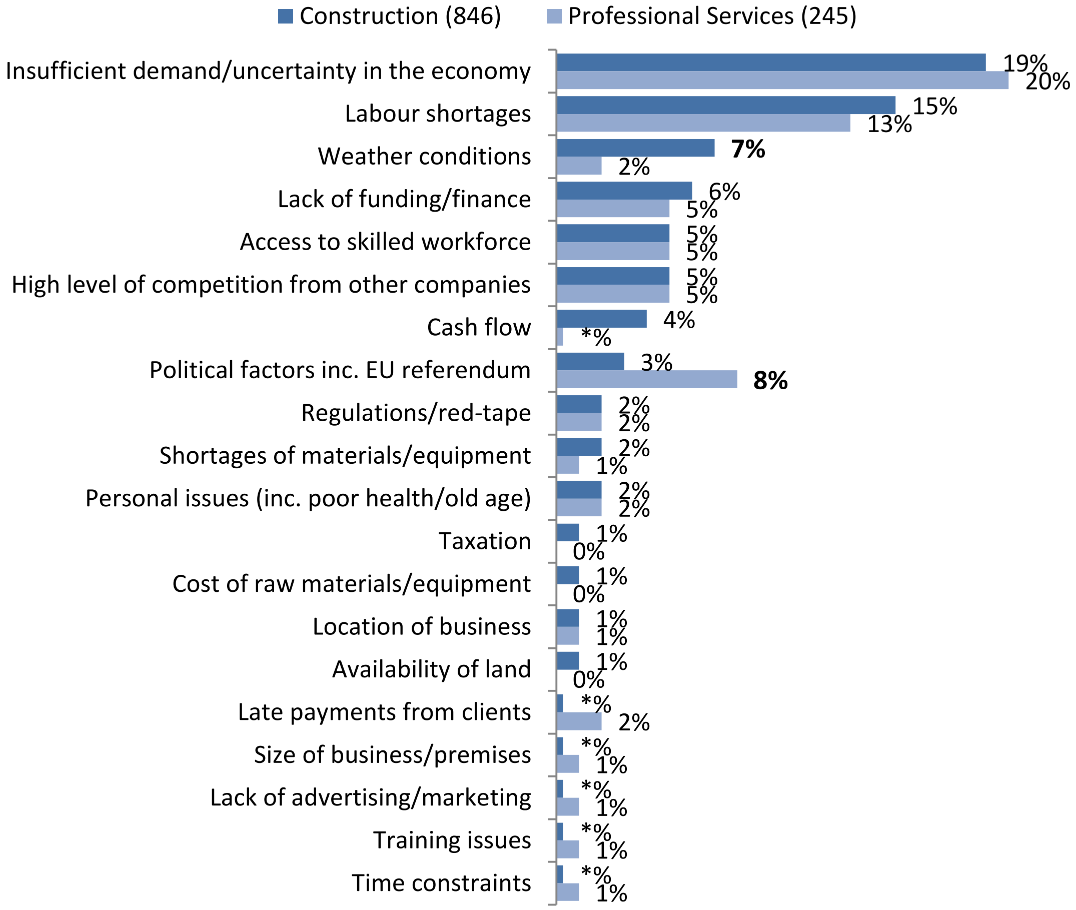
Figures in bold font are significantly higher than average minus the sub-group tested

QB2 And what factors do you think are most likely to limit your business over the next 12 months? **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY**

Construction businesses are more likely than those in professional services sectors to anticipate any constraints in the next 12 months; 26% of construction businesses compared with 35% of professional services businesses say there are no anticipated constraints. Both construction and professional services businesses expect insufficient demand/uncertainty in the economy to have an impact in the next 12 months (19% of construction and 20% of professional services businesses).

Professional services businesses are significantly more likely than construction businesses to expect political factors, including the EU referendum, to be a limiting factor for their business in the next 12 months (8%, compared with 3%).

Figure 12: Factors that businesses expect to limit sales and output in the next 12 months, by sector (businesses with employees) *denotes less than 0.5%



Unweighted sample bases in parentheses

Only factors mentioned by at least 1% of either sub-sample are shown

Figures in bold font are significantly higher than average minus the sub-group tested

QB2 And what factors do you think are most likely to limit your business over the next 12 months? **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY**

A review of expectations of limiting factors by nation/region highlights a particularly high proportion of businesses in Scotland (32%) citing insufficient demand/uncertainty in the economy, while the proportion is also slightly higher than average in Northern Ireland (24%). Employers in Wales are more likely than average to cite weather conditions as a potential limiting factor (11%) as well as being more likely to mention cash flow (7%). Within England, insufficient demand/uncertainty is more likely to be a limiting factor in the East Midlands than anywhere else (28%), while labour shortages are more likely to be a limiting factor within the South West (22%). A detailed geographical analysis of anticipated constraints is shown in the following table:

Figure 13: Factors that businesses expect to limit sales and output, by region (businesses with employees) ***denotes less than 0.5%**

	Nation					England GOR								
Column percentages	All employers	England	Northern Ireland	Scotland	Wales	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Insufficient demand/ uncertainty in the economy	19%	18%	24%	**32%**	15%	13%	**28%**	26%	29%	15%	18%	13%	12%	17%
Labour shortages	15%	**16%**	17%	5%	15%	14%	17%	10%	20%	16%	14%	22%	19%	19%
Weather conditions	6%	6%	2%	4%	**11%**	6%	6%	*%	1%	3%	**10%**	5%	5%	9%
Lack of funding/finance	6%	5%	2%	**14%**	1%	7%	*%	8%	0%	9%	2%	2%	7%	7%
High level of competition from other companies	5%	5%	2%	6%	1%	4%	7%	**9%**	1%	7%	3%	7%	3%	1%
Access to skilled workforce	5%	5%	6%	1%	5%	4%	3%	5%	2%	9%	5%	9%	7%	6%
Political factors inc. EU referendum	4%	4%	**12%**	4%	6%	1%	3%	**9%**	1%	5%	**7%**	2%	0%	0%
Cash flow	3%	2%	2%	5%	7%	1%	*%	3%	*%	3%	5%	3%	*%	3%
Shortages of materials/equip ment	2%	2%	2%	1%	0%	*%	*%	3%	6%	*%	1%	4%	*%	**7%**
Regulations/ red-tape	2%	2%	2%	*%	4%	5%	0%	2%	*%	6%	1%	*%	2%	1%
Personal issues (inc. poor health/old age)	2%	1%	3%	**8%**	5%	2%	3%	2%	0%	2%	0%	*%	0%	0%
Taxation	1%	1%	0%	0%	0%	1%	3%	0%	0%	0%	0%	0%	2%	0%
Late payments from clients	1%	1%	0%	0%	2%	0%	0%	0%	**7%**	0%	2%	0%	0%	0%
Cost of raw materials/ equipment	1%	1%	0%	0%	0%	1%	0%	0%	0%	0%	2%	2%	0%	*%
Location of business	1%	1%	0%	0%	0%	1%	3%	2%	0%	0%	0%	0%	0%	0%
Availability of land	1%	1%	0%	0%	0%	0%	3%	0%	0%	0%	0%	0%	2%	3%

		Nation							England GOR					
Column percentages	All employers	England	Northern Ireland	Scotland	Wales	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Political situation in Northern Ireland[6]	*%	0%	**3%**	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Size of business/ premises	*%	1%	0%	*%	*%	*%	**3%**	**2%**	0%	0%	0%	0%	0%	0%
Lack of advertising/ marketing	*%	1%	0%	0%	0%	*%	0%	0%	0%	0%	0%	5%	0%	0%
Product pricing	*%	*%	0%	0%	0%	*%	*%	0%	*%	0%	0%	0%	*%	**3%**
Tendering process	*%	*%	1%	0%	0%	*%	0%	0%	0%	0%	1%	0%	1%	0%
Training issues	*%	1%	0%	0%	0%	2%	3%	0%	0%	0%	0%	0%	0%	0%
Time constraints	*%	*%	0%	0%	*%	0%	0%	0%	*%	0%	0%	0%	3%	1%
Fuel prices	*%	*%	0%	*%	0%	0%	3%	0%	0%	0%	0%	0%	*%	0%
Other	5%	4%	*%	5%	9%	8%	1%	7%	5%	1%	1%	7%	3%	**3%**
Nothing	27%	27%	31%	23%	30%	29%	26%	19%	35%	26%	23%	34%	35%	29%
Don't know	5%	5%	5%	5%	8%	4%	*%	5%	1%	3%	10%	4%	7%	1%
Unweighted bases	*1091*	*857*	*77*	*82*	*75*	*148*	*78*	*107*	*46*	*90*	*134*	*105*	*78*	*71*

Figures in bold font are significantly higher than average minus the sub-group tested

QB2 And what factors do you think are most likely to limit your business over the next 12 months? **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY**

Trends in employment

Respondents in businesses with employees were asked about changes in the size of their workforces in the last 12 months.

The majority of employers (62%; 65% in 2016) reported no change in the number of staff employed in the last 12 months but, if there had been change, this was more likely to be positive rather than negative as 25% reported an increase (24% in 2016) while 11% reported a decrease (10% in 2016). There has been little change in these trends in the last two years.

Trends in employment were statistically similar across nations, English regions and sectors, although employers in Wales were slightly less likely to report an increase (18%; 30% in both Northern Ireland and Scotland; 24% in England), and more likely to report no change (68%; around three-fifths in each of the other nations).

[6] lack of a devolved government/ Stormont stalemate

By sub-sector, an increase in the workforce was significantly more likely than average in SIC 42 (33%). The propensity to have reported an increase in the workforce in the last 12 months increases with business size to a third of businesses with 10-24 employees (36%) and around half of those with 25+ employees (49% with 25-99 employees; 53% with 100+ employees).

5. Skill Shortages, Skill Gaps and Emerging Skill Needs

This section of the report examines the skills which businesses have difficulty in finding when recruiting ('skill shortages') or which are lacking in their existing, current workforces ('skills gaps'). Businesses were also asked to look ahead in order to identify skill needs emerging as a consequence of future projects, diversification, and industry developments.

Skill Shortages

Capacity

All respondents in businesses with any directly employed and/or contracted employees were asked about the relationship, over the last year, between their workload and their ability to resource that workload with the skills they had at their disposal.

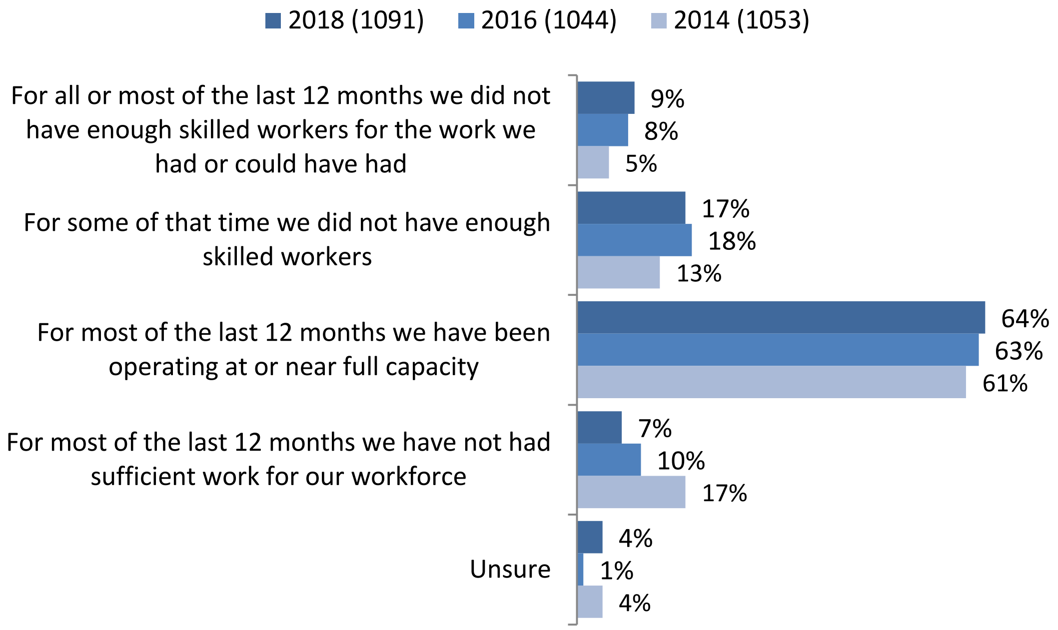
As in 2016, one in six (17%; 18% in 2016) reported that for some of that time that they had not had enough skilled workers and a further 9% (8% in 2016) reported that for all or most of the last 12 months they had not had enough skilled workers in relation to the work they had or could have had.

More than three-fifths of employers (64%, 63% in 2016) and half of self-employed individuals that have contract staff (51%; 65% in 2016) reported having been working at or near full capacity for most of the last 12 months or, in other words, that their workload and skills supply were in balance.

One in six self-employed individuals (17%) reported not having had sufficient work for their workforce, while a similar proportion (15%) reported not having enough skilled workers some of the time, and one in eight (12%) reported insufficient skilled workers during this period. Thus around two-thirds of self-employed individuals and a third of employers did not always have a balance between workload and skills supply in the last 12 months.

There has been little change in this picture since 2016.

Figure 14: Capacity and the use of workforce skills in the last year (businesses with employees)



Unweighted sample base in parentheses

QC1 Thinking about skills over the last 12 months, which one of the following comes closest to the situation for this establishment? **READ OUT AND CODE ONE ONLY**

Among employers there is little variation by size in terms of the extent to which businesses report being able to meet capacity although the propensity to report not having enough skilled workers for some of the time increases gradually with business size from 16% of those with 2-9 employees to 24% of those with 100+ employees.

By sector, businesses in construction are more likely than professional services to report not having enough skilled workers for work they had or could have had for all or most of the last 12 months (10% compared to 5%), as well as not having had enough workers for some of that time (19% compared to 12%).

Recruitment

Nearly half of employers (46%) have tried to recruit skilled labour directly during the last 12 months. This is the same proportion as in 2016.

However, among self-employed individuals there is no change with just 3% having tried to recruit staff in the last 12 months (4% in 2016 and 2014).

More than half of all employers (56%, 55% in 2016) have sub-contracted work in an attempt to overcome a lack of skilled workers, increasing to 64% of those with 25+ employees and significantly higher within construction than professional services businesses (62%, compared with 41%). It is a similar proportion among the self-employed that have tried to recruit (57%).

More than two in five employers (43%) have tried to recruit skilled self-employed or other indirect labour, and this proportion is significantly higher within construction businesses (46%) than within those in professional services (33%). One in six self-employed individuals (17%) has tried to recruit skilled self-employed or other indirect labour.

Just over two in five employers (42%, 43% in 2016) have turned work down. The proportion that has turned work down is significantly higher in construction than the professional services sector (46%, compared with 33%). More than a third of the self-employed that have tried to recruit (37%) have turned work down due to the lack of skilled workers.

A third of employers (36%) have tried to recruit Apprentices or less experienced staff to train up. This too is more prevalent among construction businesses than those in professional services (38%, compared with 29%). It compares with 13% of self-employed individuals.

Overall, more than half of all employers have tried to recruit skilled workers, whether as direct/indirect labour, in the last 12 months and the proportion is statistically similar across construction and professional services sectors (58% and 54% respectively). The proportion is lower among self-employed individuals as one would expect (20%); and higher among those in construction than those in professional services (27% and 7% respectively).

The table that follows highlights the extent to which construction businesses are more likely to take any of these steps than professional services businesses and that employment of any of these strategies for addressing a lack of skilled workers increases with business size:

Figure 15: Steps taken to try and tackle a lack of skilled workers in the last 12 months (all respondents)

Column percentages	Employers	Self-employed	Employers: Construction	Employers: Professional services	No. of employees (site based): 2-9	10-24	25-99	100+
Tried to recruit experienced, skilled employees i.e. direct labour	46%	12%	46%	48%	42%	**74%**	**79%**	**87%**
Tried to recruit skilled self-employed/other indirect labour	43%	17%	**46%**	33%	41%	**50%**	**52%**	**58%**
Tried to recruit Apprentices or less experienced staff to train up	36%	6%	**38%**	29%	32%	**56%**	**62%**	**83%**
Sub-contracted work	56%	25%	**62%**	41%	56%	60%	**63%**	65%
Turned work down	42%	16%	**46%**	33%	43%	40%	36%	19%
None of these	16%	11%	12%	**25%**	**17%**	9%	5%	5%
Unweighted bases	*1091*	*122*	*846*	*245*	*479*	*249*	*278*	*85*

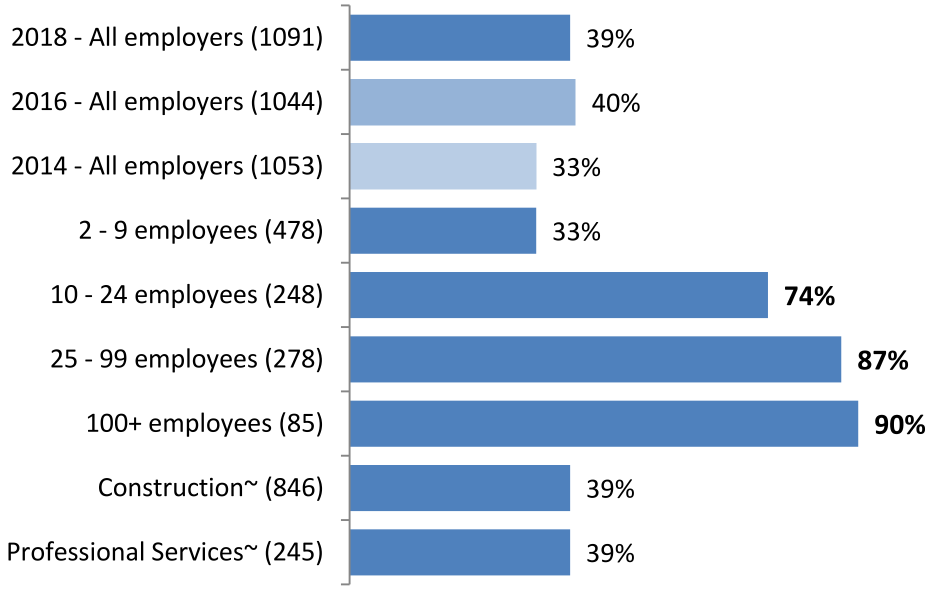
Figures in bold font are significantly higher than average minus the sub-group tested

QC3 In the last 12 months, which of the following steps, if any, have you taken to try and tackle a lack of skilled workers? **READ OUT AND CODE ONE FOR EACH**

Two-fifths of employers (39%) have actually recruited staff in the last 12 months. This is a similar proportion to that reported in 2016 (40%).

The incidence of having recruited in the last 12 months increases with business size, from 33% of businesses with less than 10 employees to 90% of those with 100 or more employees. There is no difference between construction and professional services businesses with regard to their having recruited staff in the last 12 months.

Figure 16: Proportion of businesses that have recruited any new direct employees in the last 12 months (businesses with employees)



Unweighted sample bases in parentheses ~based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested

QC4 In the last 12 months, has this establishment recruited any new direct employees?

The proportions that have recruited are significantly higher than average in Northern Ireland (55%) and Scotland (50%) as well as within the Yorkshire and Humber GOR[7] (54%). This reflects the trend reported in 2016.

Recruitment difficulties

Approaching half (47%) of employers that have tried to recruit skilled direct or self-employed staff have experienced difficulties in filling the positions. This equates to 31% of all employers. There has been no change in this statistic since 2016.

More than half of the self-employed that have tried to recruit in the last 12 months (53%) have experienced difficulties (11% of *all* self-employed individuals). These figures are slightly lower than in 2016 (60% and 13% respectively).

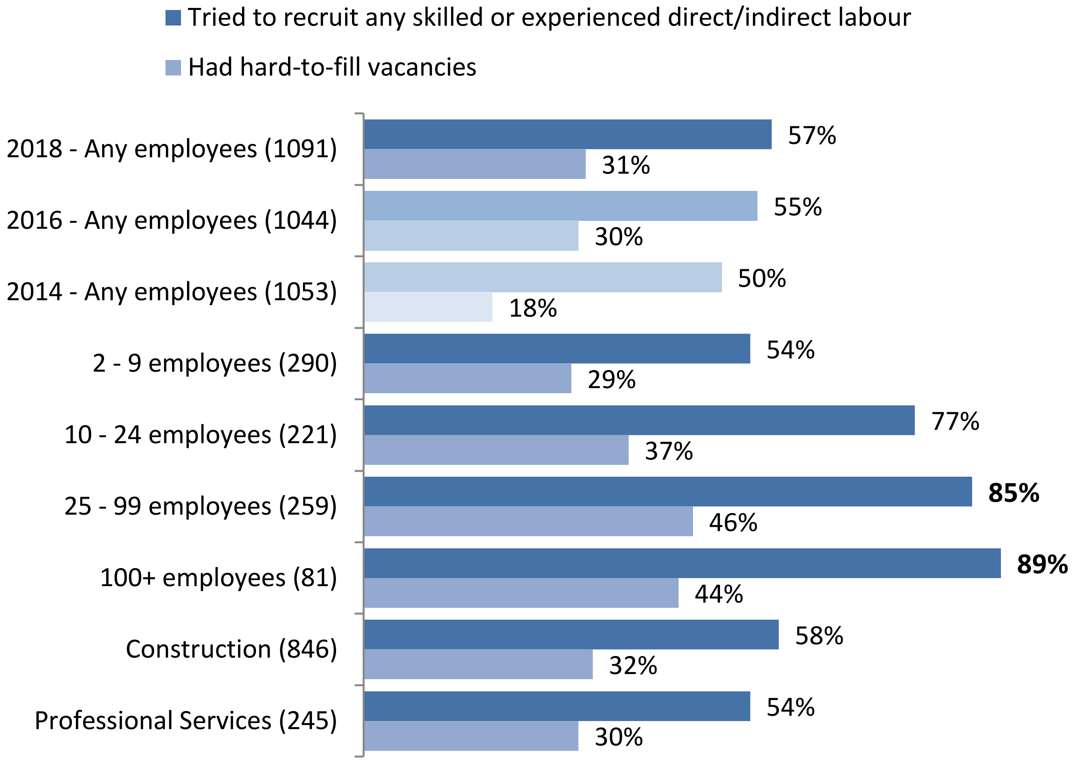
Between 2014 and 2016 there was an increase in the incidence of hard-to-fill vacancies, and this increase has held since (36% in 2014, 21% in 2011 and 29% in 2009).

Recruitment difficulties are similar for businesses in construction (47% of those who tried to recruit) and professional services (49% of those who tried to recruit). The proportion is higher than average among employers in the North West (79%) and North East (70%) GORs.

[7] GOR – Government office region

The chart that follows summarises attempted recruitment and the extent of hard-to-fill vacancies by industry group and business size. Recruitment difficulties increase with business size, reflecting, of course, the increase in the incidence of recruitment with business size.

Figure 17: Summary of recruitment activity and difficulties, by sector and size (businesses with employees)



Unweighted sample bases in parentheses ~based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested

QC3 In the last 12 months, which of the following steps, if any, have you taken to try and tackle a lack of skilled workers? **READ OUT AND CODE ONE FOR EACH**

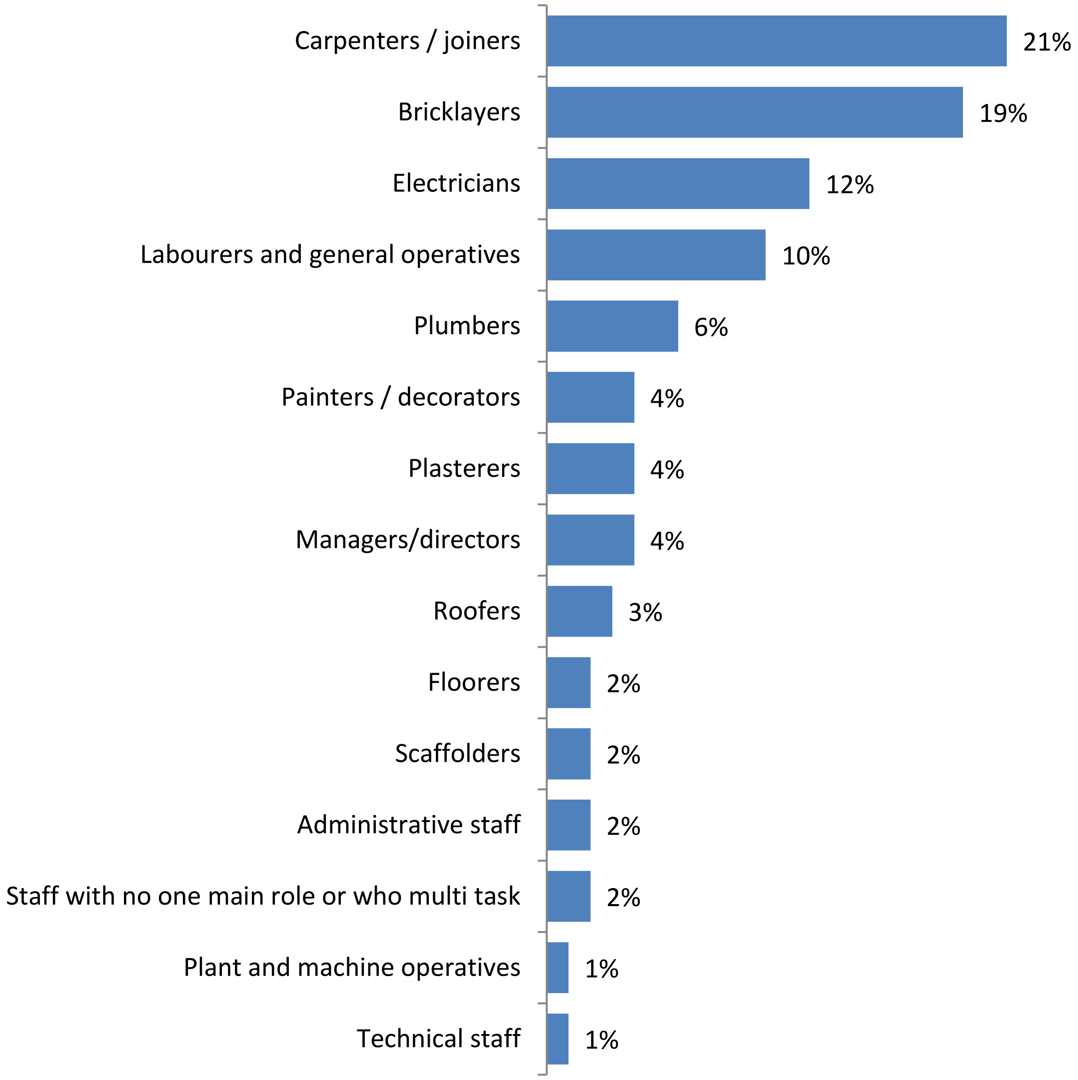
QC9 You mentioned that you tried to recruit skilled employees/self-employed staff in the last 12 months. Were any of these vacancies hard-to-fill?

Occupations in which hard-to-fill vacancies have been experienced

Given the diverse range of occupations that are employed, the roles that have been hard to fill are also diverse.

Employers in the construction sector were most likely to have experienced difficulties recruiting for carpenters and joiners, and bricklayers. The following chart shows the proportions of employers that have experienced hard-to-fill vacancies in respect of particular occupations:

Figure 18: Occupations in which recruitment difficulties have been experienced within the construction sector (employers that have had hard-to-fill vacancies)

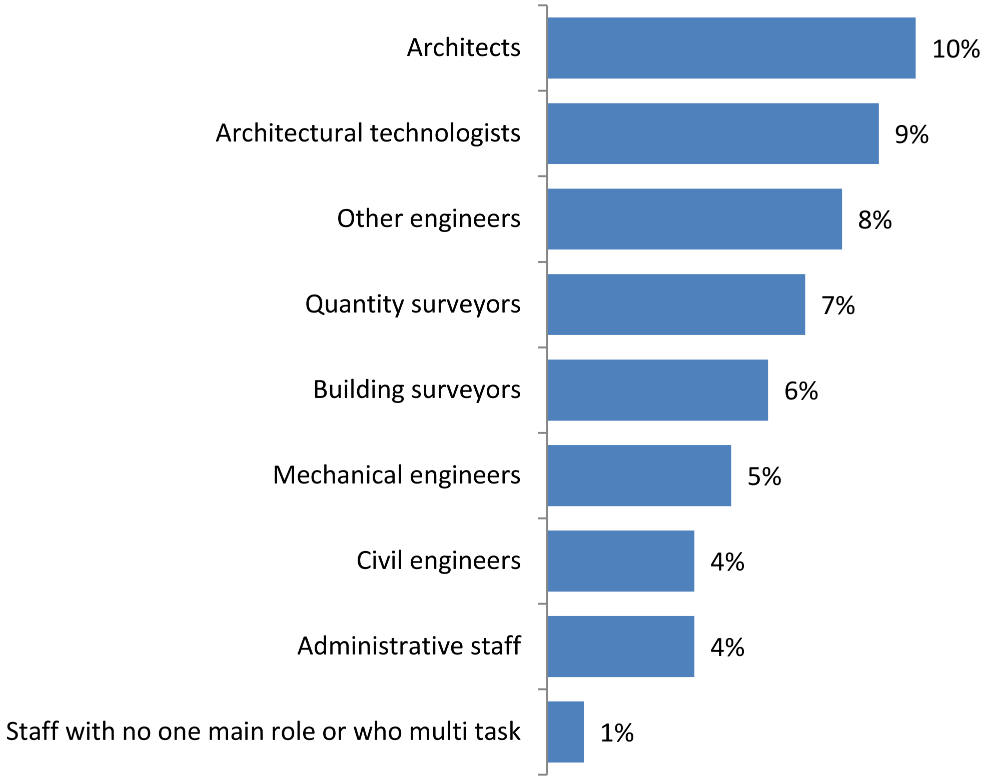


Unweighted sample base = 325

QC10 In which occupations have vacancies been hard-to-fill over the last 12 months? **DO NOT READ OUT. CODE ALL THAT APPLY** *only includes occupations mentioned by 1% or more*

Of particular significance within professional services businesses is difficulty in recruiting engineers other than civil and mechanical engineers (25% of professional services businesses with any recruitment difficulty):

Figure 19: Occupations in which recruitment difficulties have been experienced within the professional services sector (employers that have had hard-to-fill vacancies)



Sample base = 86

QC10 In which occupations have vacancies been hard-to-fill over the last 12 months? **DO NOT READ OUT. CODE ALL THAT APPLY** *only includes occupations mentioned by 1% or more*

Causes

Respondents who experienced hard-to-fill vacancies were asked about the main causes of these difficulties. They were given a list of possible causes and asked to specify those that applied.

Among employers, the most frequently cited cause of hard-to-fill vacancies is that applicants lack the skills required (73%; 88% in 2016). Not enough young people are being trained in the construction industry (64%; 79% in 2016) is also a significant cause of recruitment difficulties. The top causes of hard-to-fill vacancies are the same as those reported in 2016 and 2014, although fewer respondents cite them.

More than half of respondents that have reported recruitment difficulties for skilled staff cite a lack of relevant work experience among applicants (59%) and a low number of applicants in general (56%), while nearly half cite a lack of attitude or motivation among applicants (48%) and fewer cite a lack of applicants with relevant qualifications (45%) and competition from other employers (42%).

Larger businesses are particularly likely to cite competition from other employers as a cause of hard-to-fill vacancies (59% of those with 100+ employees, compared with 42% of businesses with fewer than 100 employees).

Construction businesses are significantly more likely than those in professional services to consider that there are not enough young people being trained in the construction trades in recent years (71%, compared with 44%) and also to cite a lack of the appropriate attitude and motivation among applicants (53%, compared with 34%).

Figure 20: Perceived causes of recruitment difficulties, by sector – prompted, multiple response (employers that have had hard-to-fill vacancies)

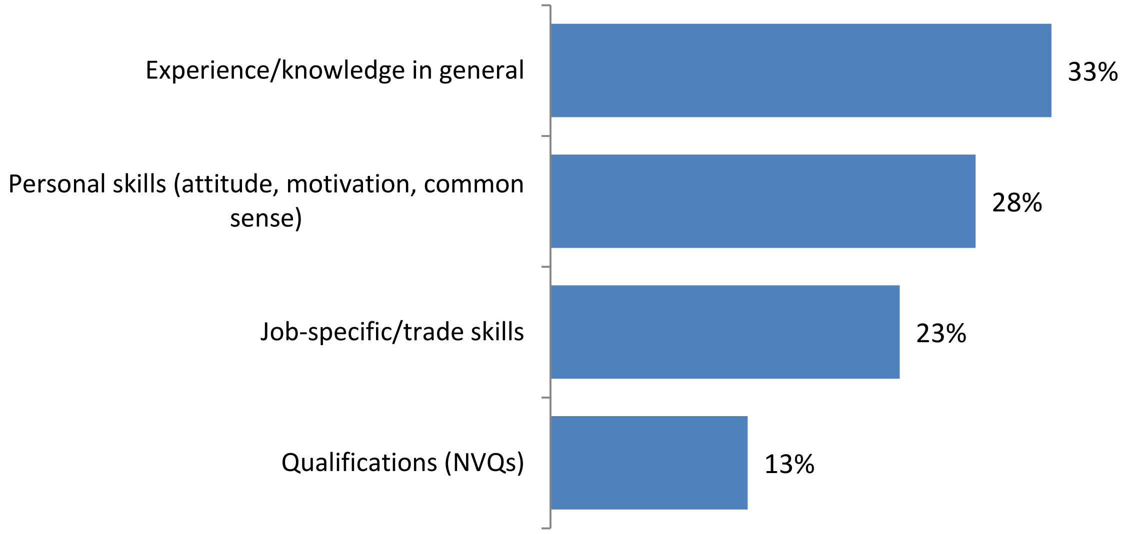
Unweighted sample bases in parentheses

QC12 Which of the following do you feel are the main causes of having hard-to-fill vacancies for skilled staff? **READ OUT AND CODE ALL THAT APPLY**

Skills which are difficult to obtain

One in three employers (33%) that have experienced recruitment difficulties specified general experience/knowledge as an area in which applicants are lacking, while more than one in four (28%) cited a need for personal skills, such as attitude, motivation, and common sense, amongst applicants for job roles, while nearly one in four (23%) specified job-specific/trade skills.

Figure 21: Skills difficult to obtain from applicants – unprompted, multiple response (employers that have had hard-to-fill vacancies)



Unweighted sample base = 376

QC13 What have been the two main skills difficult to obtain from applicants? **PROBE FULLY AND WRITE IN**

Impact on business

Recruitment difficulties have had an impact on 92% of employers that have reported them. This is most likely to have been the increased use of overtime and higher workloads for existing staff (61%; 74% in 2016).

Just over half of employers (52%) that have had hard-to-fill vacancies reported that they have lost business or that they have turned down opportunities to bid for work. This proportion is significantly higher in construction than in professional services (57%, compared with 38%).

The same proportion of employers (52%) that have had hard-to-fill vacancies cited an increase in operating costs. This proportion is also significantly higher within construction than professional services businesses (56%, compared with 41%).

Two in five employers that reported recruitment difficulties said they had missed project deadlines (40%) or had to outsource work (38%).

Figure 22: Impact of hard-to-fill vacancies – prompted, multiple response (employers that have had hard-to-fill vacancies)

Column percentages	Any employees	Self-employed	Employers: Construction	Employers: Professional services	No. of employees (site based): 2-9	No. of employees (site based): 10-24	No. of employees (site based): 25-99	No. of employees (site based): 100+
Increase the use of overtime and the workload for staff generally	61%	13%	60%	65%	60%	67%	69%	**79%**
Lose business or turn down bidding for work	52%	50%	**57%**	38%	**54%**	50%	35%	21%
Increase operating costs	52%	63%	**56%**	41%	52%	54%	54%	56%
Outsource work	38%	57%	38%	39%	38%	36%	44%	44%
Miss project deadlines	40%	43%	42%	35%	40%	49%	33%	22%
Other impacts	7%	28%	6%	7%	7%	4%	8%	**13%**
None	7%	12%	5%	**12%**	7%	7%	9%	14%
Don't know	1%	0%	1%	*%	1%	0%	4%	0%
Unweighted bases	*411*	*13*	*325*	*86*	*141*	*92*	*138*	*40*

Figures in bold font are significantly higher than average minus the sub-group tested

QC14 Generally speaking, have hard-to-fill vacancies over the last 12 months caused the company to….? **READ OUT CODES 1-5, ROTATE AND CODE ALL THAT APPLY**

Overcoming recruitment difficulties

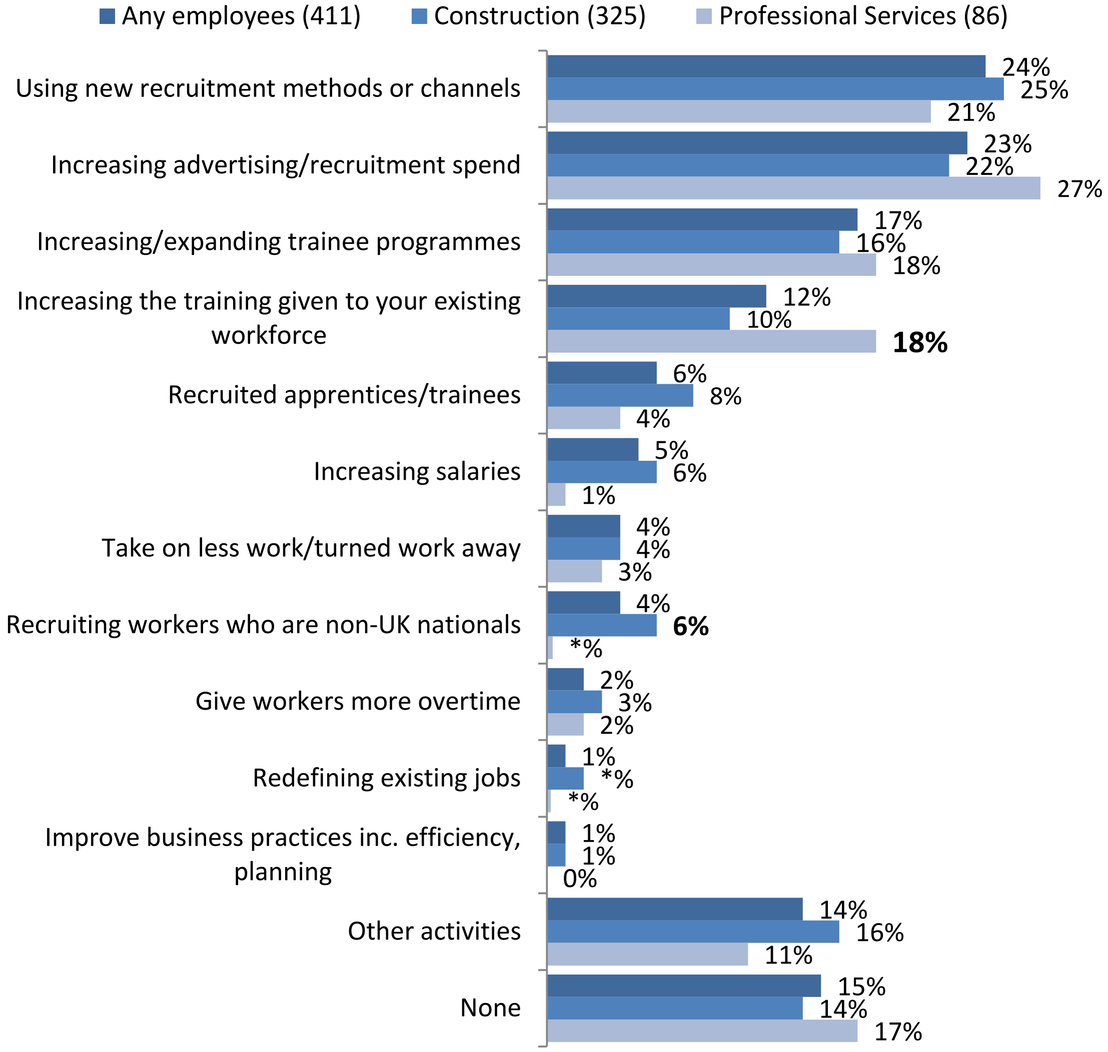
Respondents were asked, without being offered a prompted list, about the steps their business has undertaken to overcome recruitment difficulties.

A quarter of employers that have had hard-to-fill vacancies have used new recruitment methods or channels (24%) and/or increased their advertising/recruitment spend (23%). One in six have increased/expanded their trainee programmes (17%).

While one in eight employers have increased the training given to their existing workforce (12%), this proportion is significantly higher among professional services than construction businesses (18% and 10% respectively).

Construction businesses are significantly more likely than professional services businesses to recruit workers who are non-UK nationals (6% and less than 1% respectively).

Figure 23: Activities that have been undertaken to overcome recruitment difficulties, by sector – unprompted, multiple response (employers that have had hard-to-fill vacancies) *denotes less than 0.5%



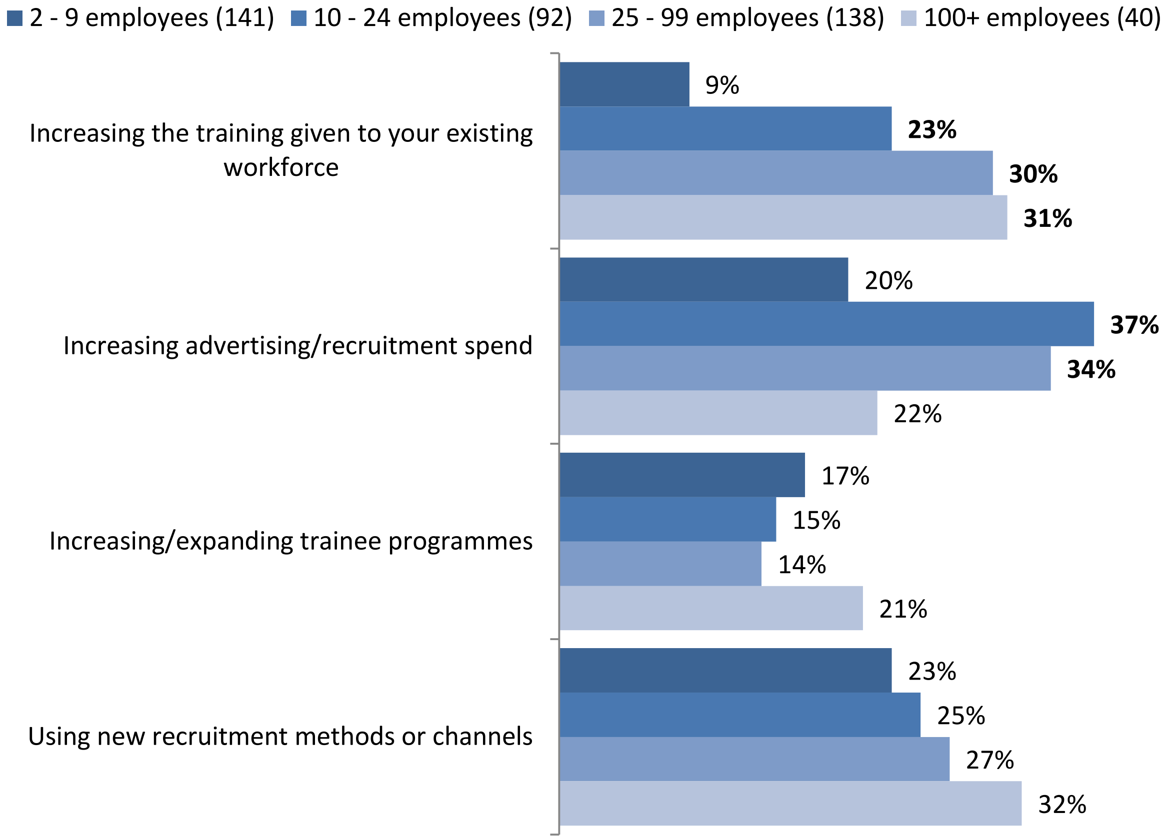
Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested

QC15 What, if anything, is this establishment doing to overcome the difficulties that you are having finding candidates to fill these hard-to-fill vacancies? **DO NOT READ OUT. CODE ALL THAT APPLY**

Examination of responses according to size of business (see next chart) shows that businesses with 25 or more employees are more likely to respond to recruitment difficulties by increasing training amongst their existing employees, while small businesses (10-99 employees) are more likely than micro businesses (2-9 employees) and those with 100+ employees to increase their advertising/recruitment spend.

Figure 24: Use of training and recruitment methods to overcome recruitment difficulties, by business size – unprompted, multiple response (employers that have had hard-to-fill vacancies)



Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested

QC15 What, if anything, is this establishment doing to overcome the difficulties that you are having finding candidates to fill these hard-to-fill vacancies? **DO NOT READ OUT. CODE ALL THAT APPLY**

Skill Gaps

Fourteen per cent of employers report skill gaps within their workforce. This compares with the significantly higher proportion of 20% in 2016 but is higher than the figure reported in the 2017 Employer Skills Survey amongst Construction employers (10%).

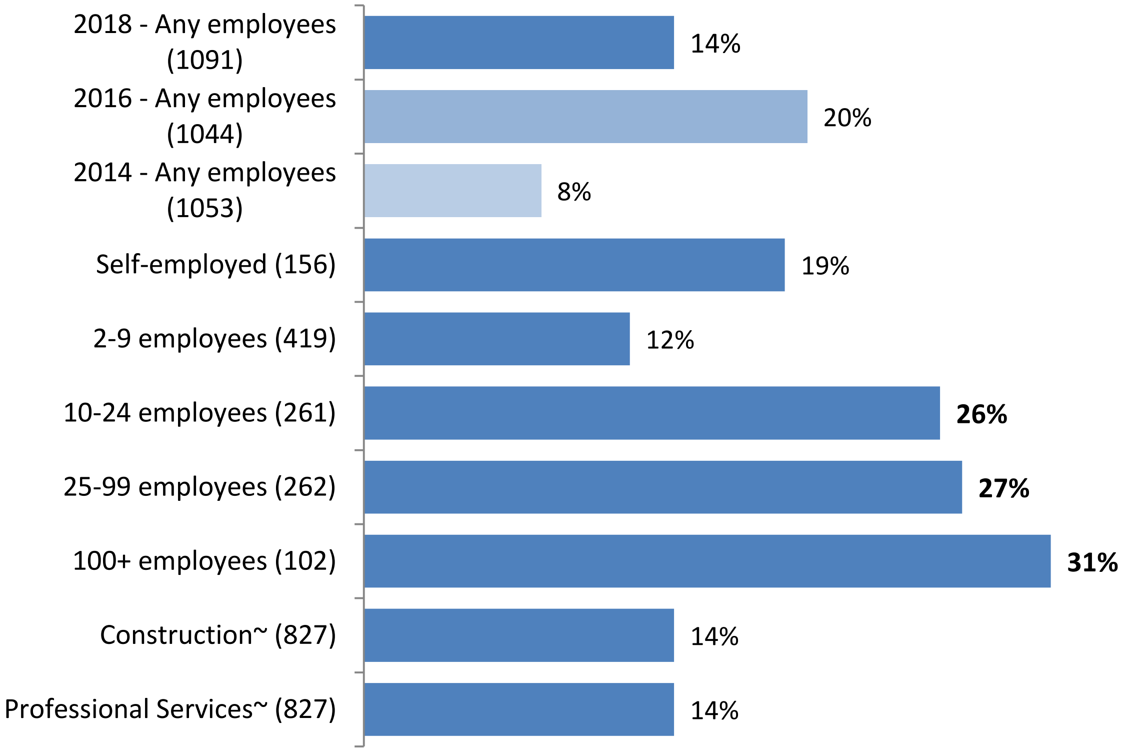
The propensity to have skill gaps increases with business size, from 12% of employers with fewer than 10 employees to a quarter of those with between 10 and 99 employees (10-24 employees, 26%; 25-99 employees, 27%) to a third of those 100 or more employees (31%).

There is little variation across nations, but the proportion is significantly higher than average amongst employers in the East Midlands (28%). It is significantly lower than average in London (6%), the North East (8%) and the East of England (9%).

When asked if they themselves are fully proficient, 19% of sole traders/the self-employed admitted to having a need to develop and improve their skills (27% in 2016).

The frequency of reported skill gaps by size of business and broad sectors is shown in the following chart:

Figure 25: Proportion of businesses with skill gaps, by sector and size (all employers/self-employed individuals)



Unweighted sample bases in parentheses ~ based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested

QD2 Thinking about these directly employed staff, I'd like to know how many you think are fully proficient at their job i.e. able to do the job to the required level. How many of your existing **OCCUPATION** would you regard as fully proficient at their job?

Occupations in which skill gaps exist

Respondents provided detailed information on the occupations employed within their businesses and, in the case of the self-employed, the trades that they themselves work in. They were then asked to specify the number of people in each of these occupations that are fully proficient in their jobs.

In terms of the number of people lacking proficiency, this is, of course affected by the number of people employed in various occupations. Using the survey data to estimate the actual number of staff affected within occupations, the most numerous skill gaps are among administrative staff (5,858 out of 141,052 staff), labourers and general operatives (5,657 out of 140,178), other engineers (5,530 out of 62,570), staff with no one main role or who multi-task (5,089 out of 93,489) and managers/directors (5,254 out of 158,753). These figures should be treated as indicative but highlight the extent of skills gaps in these occupations.

Fewer than one in ten workers in each occupational group have skill gaps, although the exception to this is one in seven mechanics. Occupations at the higher end of this range include other engineers (9%), building service engineers (8%), technicians (8%) and architectural technologists (8%).

Among the self-employed with skill gaps, architects are most likely to have skill gaps (24% of those with skill gaps).

Skills

Overall, the three main skill areas in which staff with skill gaps require further development include experience and knowledge in general (25%), personal skills (16%), and job specific/trade skills (13%). Management and IT skills are each reported as missing by 5% of employers with skill gaps.

The following table also shows a breakdown of employers' reports of types of skill gaps by some key industry occupations. *Please note that due to the very small numbers of cases these statistics are illustrative or indicative at best.* The data *may* suggest, however, that management and personal skills are most likely to be insufficient amongst HR, legal and business professionals, and amongst civil engineers there are some gaps in general experience and knowledge:

Figure 26: Skills required, by occupation in which skill gaps are cited (employers with skill gaps) *denotes less than 0.5%

Column percentages	Employers with skill gaps	Carpenters/joiners	Bricklayers	Roofers	Plant and machine operatives	Electricians	Plumbers	Labourers and general operatives	Supervisors	Technical staff	Mechanical engineers	Other engineers	Managers/directors	HR, legal and business professionals	Administrative staff	Staff with no one main role or who multi task
Experience/ knowledge	27%	23%	50%	3%	9%	3%	22%	26%	36%	49%	6%	20%	2%	25%	37%	46%
Personal skills (attitude, motivation, common sense)	15%	2%	23%	1%	18%	4%	11%	20%	9%	6%	6%	14%	24%	37%	18%	19%
Job-specific/trade skills	13%	12%	22%	19%	15%	5%	24%	11%	3%	6%	41%	3%	41%	29%	3%	3%
IT skills	6%	1%	0%	0%	0%	0%	0%	2%	7%	6%	0%	0%	4%	0%	32%	1%
Management	5%	*%	0%	*%	52%	0%	1%	*%	5%	1%	0%	11%	29%	31%	11%	1%
Roofing	3%	8%	0%	24%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%
Carpentry/ joinery	3%	10%	0%	0%	0%	0%	0%	7%	0%	0%	0%	0%	0%	0%	0%	0%
Qualifications (NVQs)	2%	0%	0%	0%	0%	1%	21%	9%	31%	0%	0%	0%	0%	0%	0%	0%
Health & Safety	1%	*%	0%	0%	0%	3%	0%	1%	0%	0%	4%	0%	1%	1%	1%	2%
Plumbing	1%	0%	0%	0%	0%	0%	21%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Electrical/electronic skills	1%	0%	0%	0%	0%	12%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%
Welding/fabrication	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	14%	0%	0%	0%	4%	0%
Pipe work	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	14%	0%	0%	0%	4%	0%
Plant operation	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Bricklaying	*%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Wallpapering	*%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Any other skills	40%	62%	42%	27%	68%	31%	27%	39%	23%	10%	19%	76%	49%	35%	42%	21%
Unweighted Bases	*234*	*39*	*13*	*14*	*13*	*24*	*14*	*49*	*19*	*18*	*10*	*17*	*34*	*19*	*49*	*24*

QD5 **EMPLOYERS:** Thinking about **[OCCUPATION]** who are not fully proficient, which skills do you feel need improving? **SELF EMPLOYED:** Which skills do you feel you need to develop and improve?] **PROBE FULLY AND WRITE IN**

Among self-employed individuals with skill gaps, management skills are the most frequently mentioned gap (16%).

Causes

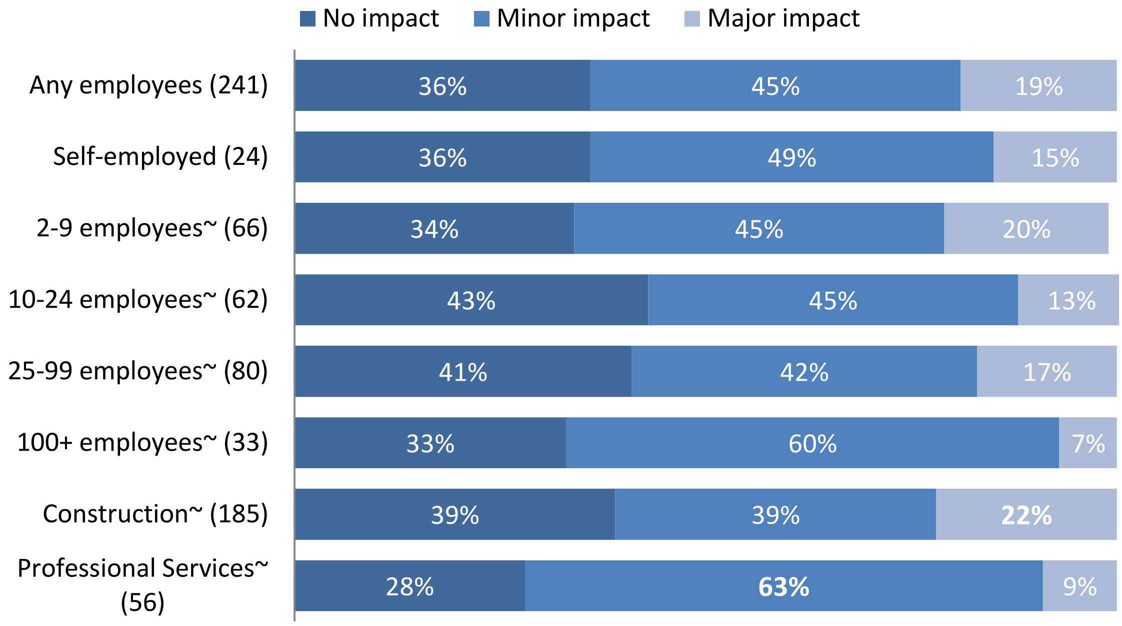
More than a third of employers reporting skill gaps cite the fact that employees were in training as the reason (38% of those with skill gaps). Slightly fewer (35%) cite lack of experience or staff having been recently recruited as the reason. One in six employers with skill gaps (16%) mentioned that staff lack motivation to obtain the necessary skills, while slightly fewer believe it is due to the lack of opportunity to train and develop the staff in question (13%).

Impact

When asked about the impact of skill gaps on business performance, around one in five employers (19%) and one in seven self-employed individuals (15%) report that they have had a major impact, with 45% of employers and 49% of self-employed individuals reporting that the impact has been minor.

Among employers, construction businesses are more likely than those in professional services to report a major impact of skill gaps (22%, compared with 9%), while those in professional services are more likely to report a minor impact (63%, compared with 39%). Overall, professional services businesses are more likely than construction businesses to report that skill gaps have had any impact on the business (72%, compared with 61%).

Figure 27: Extent to which skill gaps impact on business performance, by sector and size (where have skill gaps)



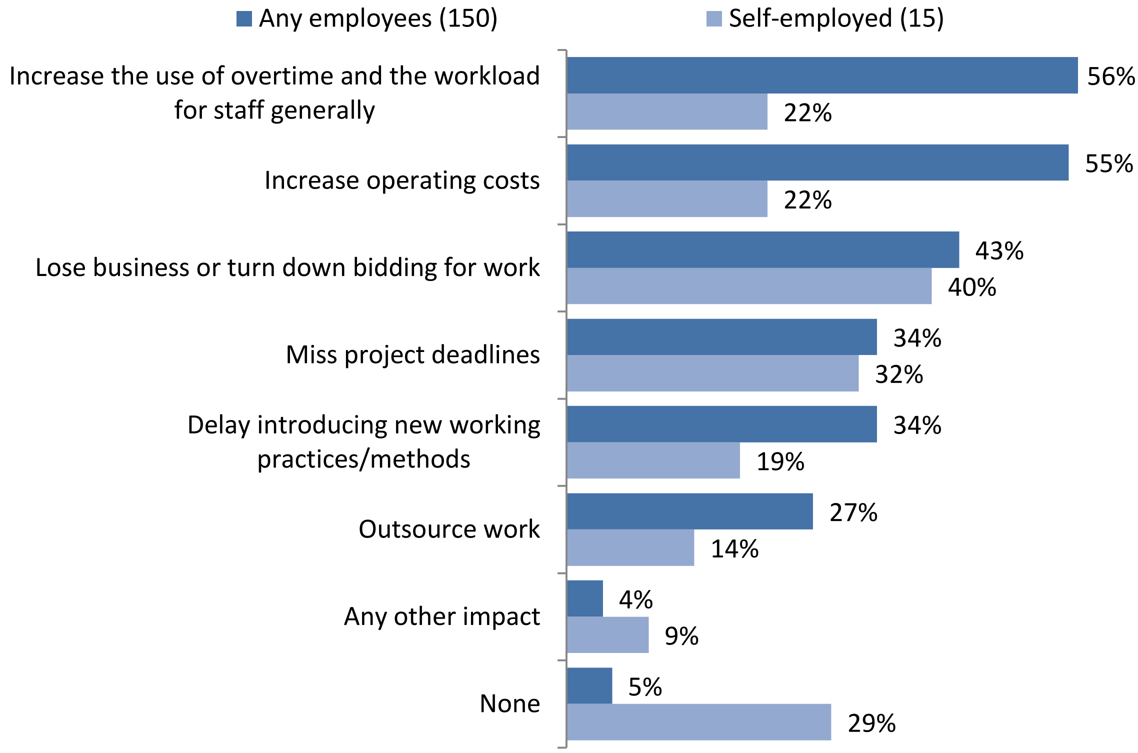
Unweighted sample bases in parentheses ~ based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested

QD6 **EMPLOYERS:** Thinking about your establishment as a whole, does the fact that some of your staff are not fully proficient have an impact on how your establishment performs? **SELF-EMPLOYED:** Does the fact that there are skills you need to develop and improve have an impact on your business?] **READ OUT AND CODE ONE ONLY**

Amongst employers with skill gaps, increased use of overtime and increased workloads for staff (56%) and increased operating costs (55%) are the most common ways in which they have impacted on the business. Among the self-employed the most frequent impact of skill gaps is losing business or having to turn down bidding for work (40%).

Figure 28: Ways in which skill gaps are impacting on businesses (where have skill gaps)



Unweighted sample bases in parentheses

QD7 **EMPLOYERS:** Is the fact that some of your staff are not fully proficient causing this establishment to…? **SELF-EMPLOYED:** Is the fact that you are not fully proficient causing your business to…?] **READ OUT AND CODE ALL THAT APPLY**

Overcoming skill gaps

Most employers with skill gaps (84%) state some action that they are taking to overcome them. The majority has increased training activity/spend or increased or expanded their trainee programmes (66%). This proportion increases to 73% of professional services businesses and around three-quarters of employers with skill gaps that have 10 or more employees (74% with 10-24 employees; 79% with 25-99 employees and 74% with 100+ employees).

Nearly two-thirds of the self-employed with skill gaps (64%) are increasing training activity.

Figure 29: Action businesses are taking to overcome skill gaps, by sector - unprompted, multiple response (employers with skill gaps)

Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested

QD8 **EMPLOYERS:** What action, if any, is this establishment taking to overcome the fact that some of the staff are not fully proficient in their job? **SELF-EMPLOYED:** What action, if any, are you taking to develop or improve your skills? **DO NOT READ OUT. CODE ALL THAT APPLY**

Up-skilling

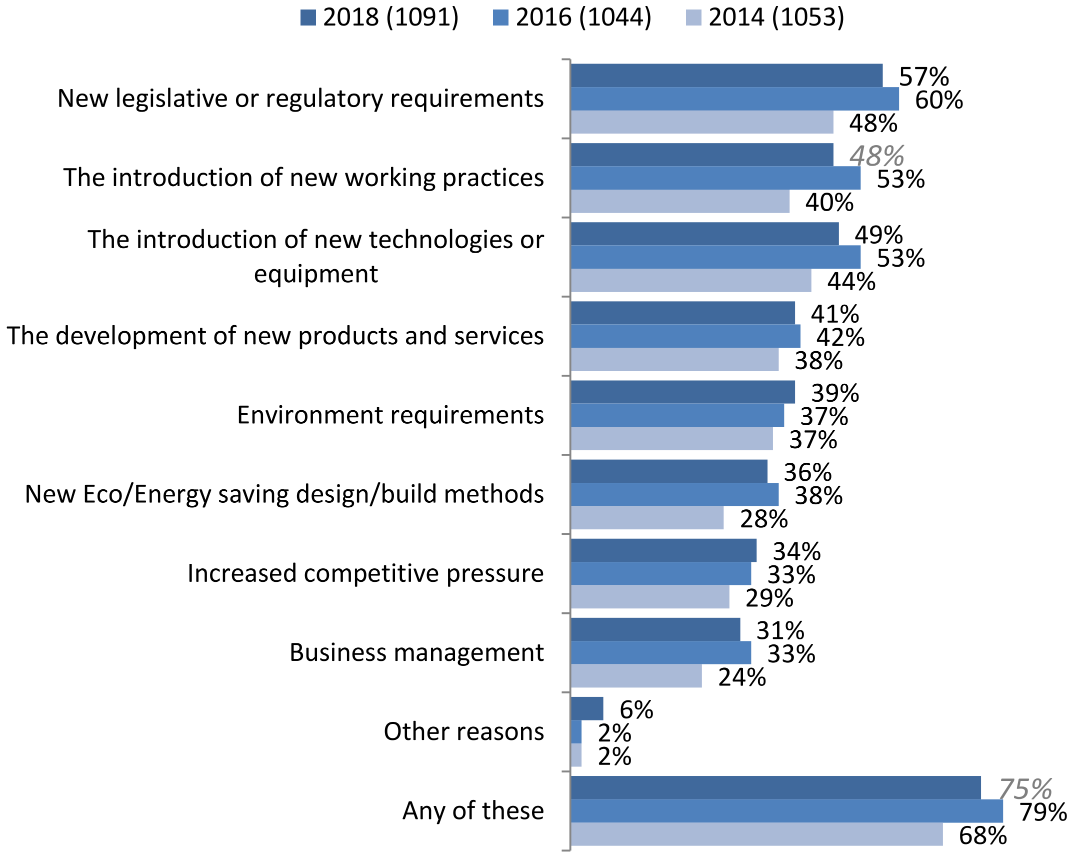
Drivers of need for new skills and knowledge

All employers were asked whether a range of factors would require new skills in the workforce. Three-quarters of employers (75%; 79% in 2016) anticipated that one or more of the factors would have this effect.

The most frequent driver of new skills and knowledge among employers is new legislative or regulatory requirements (57%), while around half of employers mention the introduction of new technologies or equipment (49%) and the introduction of new working practices (48%). These were also the top three drivers of the need for new skills and knowledge among employers in both 2016 and 2014.

There has been a slight decrease in employers mentioning most drivers including in the requirement to upskill overall. Environment requirements and competitive pressure remain at least as significant as they have been in previous years.

Figure 30: Drivers of new skills or knowledge - prompted, multiple response (all employers)



Unweighted sample bases in parentheses

Figures in italics are significantly lower than the previous year minus the sub-group tested

QE1 **EMPLOYERS:** Over the next 12 months do you expect that employees will need to acquire new skills or knowledge as a result of…? **SELF-EMPLOYED:** Over the next 12 months do you expect to need to acquire new skills or knowledge as a result of…? **READ OUT AND CODE ONE FOR EACH**

Among self-employed individuals two-thirds identify a need to acquire new skills or knowledge (66%) with the drivers of this most likely to be new legislative or regulatory requirements (52%) and the introduction of new technologies and equipment (40%). For these businesses, however, new eco/energy saving design/build methods (34%) feature above the introduction of new working practices, the development of new products and services and environment requirements (all 28%).

The extent to which any of these factors is likely to drive the need for improved skills and knowledge in the workforce increases with business size (see following table).

Figure 31: Drivers of new skills or knowledge, by business size and sector - prompted, multiple response (all respondents)

Column percentages	Any direct employees	Self-employed	Employers: Construction	Employers: Professional services	No. of employees (site based): 2-9	10-24	25-99	100+
New legislative or regulatory requirements	57%	52%	55%	61%	56%	56%	**64%**	**75%**
The introduction of new technologies or equipment	49%	40%	*46%*	**58%**	48%	52%	**66%**	**79%**
The introduction of new working practices	48%	28%	48%	49%	47%	52%	**57%**	**68%**
The development of new products and services	41%	28%	*38%*	**51%**	41%	42%	45%	**57%**
Environment requirements	41%	28%	*39%*	**46%**	40%	41%	**48%**	**53%**
New Eco/Energy saving design/build methods	36%	34%	*34%*	**42%**	37%	31%	36%	46%
Increased competitive pressure	34%	18%	*32%*	**42%**	34%	33%	**41%**	**52%**
Business management	31%	13%	*28%*	**37%**	29%	36%	**45%**	**60%**
Other reasons	6%	3%	6%	6%	*5%*	**9%**	7%	9%
Any of these	75%	66%	*73%*	**82%**	*74%*	**81%**	**86%**	**89%**
Unweighted bases	*1091*	*122*	*846*	*245*	*479*	*249*	*278*	*85*

Figures in bold font are significantly higher than average minus the sub-group tested;

QE1 **EMPLOYERS:** Over the next 12 months do you expect that employees will need to acquire new skills or knowledge as a result of…? **SELF-EMPLOYED:** Over the next 12 months do you expect to need to acquire new skills or knowledge as a result of…? **READ OUT AND CODE ONE FOR EACH**

By nation, the proportion requiring new skills in the workforce at all is lower than average amongst employers in Wales (65%), while within England, the proportion is higher than average within the North East and South West GORs (82% and 80% respectively) and lower than average within the West Midlands (65%). There are no significant differences in the specific drivers of skills by nation, although employers in the London GOR are significantly more likely than average to mention most drivers.

Occupations affected by the 'drivers'

In terms of the occupations that are likely to be most affected by the need to acquire new skills or knowledge, managers/directors are the most frequently cited (16%). This reflects the extent to which this occupation group is present across businesses as well as managerial responsibility for managing the introduction and effects of the various drivers. This proportion is higher among construction businesses than professional services businesses (18%, compared with 13%).

Amongst professional services businesses, architects (17%) are cited as the occupational group most likely to be affected (see Figure 32).

Figure 32: Top occupations affected by the need to acquire new skills or knowledge in the next year, by sector (employers anticipating the need for new skills and knowledge)

Column percentages	Construction		Professional services
Managers/directors	18%	Architects	17%
Carpenters/joiners	10%	Managers/directors	13%
Labourers and general operatives	10%	Other engineers	11%
Administrative staff	10%	Civil engineers	9%
Electricians	6%	Building service engineers	8%
Technical staff	6%	Administrative staff	5%
Bricklayers	5%	Quantity surveyors	4%
Staff with no one main role or who multi task	5%	Technicians	4%
Supervisors	4%		
Unweighted sample base	*584*	*Unweighted sample base*	*181*

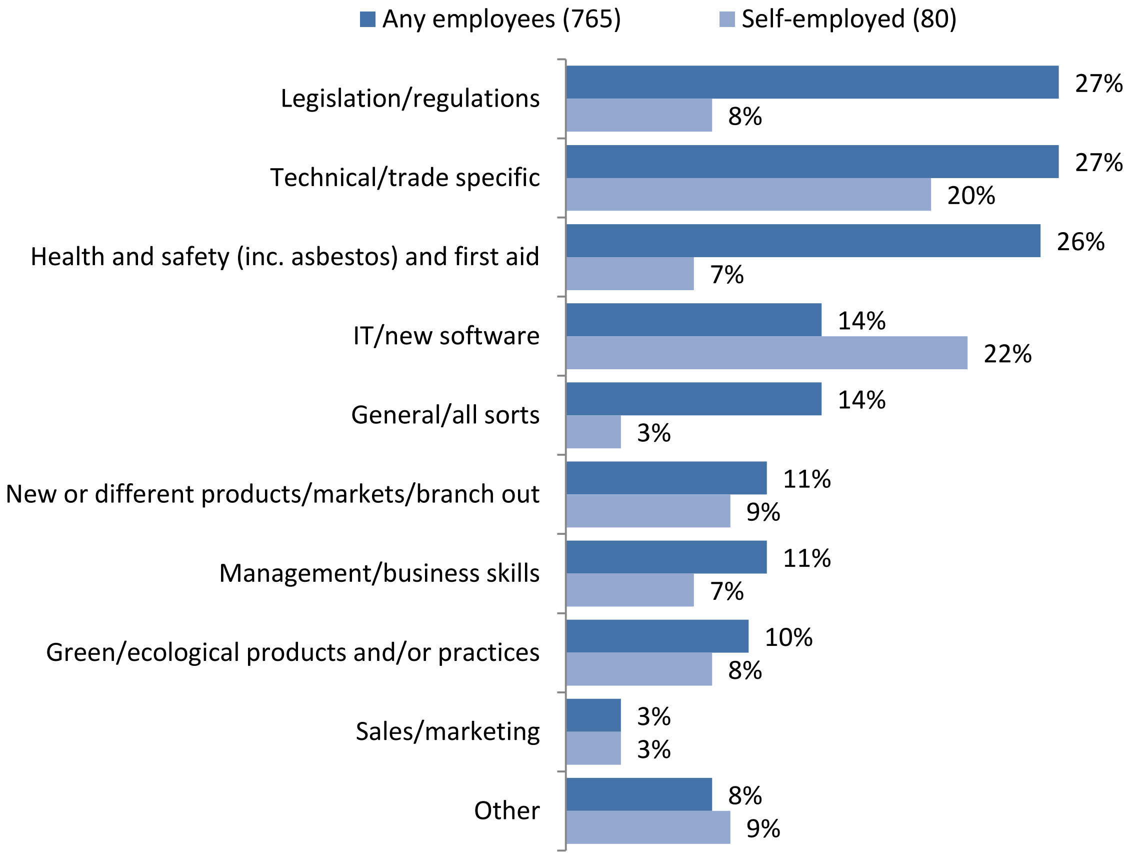
QE2 Which single occupation will be most affected by this need to acquire new skills or knowledge? **PROMPT AS NECESSARY AND CODE ONE ONLY**

Skills required as a result of the 'drivers'

The areas in which skills and/or knowledge that need improving or updating that are most frequently reported by employers, include legislation/regulations (27%), technical/trade specific (27%) and health and safety/first aid (26%).

Of the 66% of self-employed individuals who anticipate a future skills need, the most commonly cited skills and knowledge required are in relation to IT/new software (22%) and technical/trade specific skills (20%).

Figure 33: Skills and knowledge that will need improving or updating over the next 12 months - multiple response (where need to acquire new skills or knowledge)



Unweighted sample bases in parentheses

QE3 **EMPLOYERS:** Which skills do you feel will need improving or updating amongst your **STAFF** over the next 12 months? **SELF-EMPLOYED:** Which skills do you feel you will need to improve or update over the next 12 months? **PROMPT AS NECESSARY AND CODE ALL THAT APPLY**

Among employers, the need to improve or update health and safety skills/knowledge are more frequently cited by construction businesses than those in professional services (27% compared with 22%), while professional services businesses are most likely to cite skills and knowledge related to technical/trade areas (40%, compared with 22% for construction), legislation/ regulations (35% compared with 23%), IT/new software (24%, compared with 10%) and management/business skills (19%, compared with 8%).

Figure 34: Skills and knowledge that will need improving or updating over the next 12 months, by sector - multiple response (where need to acquire new skills or knowledge)

Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested.

QE3 **EMPLOYERS:** Which skills do you feel will need improving or updating amongst your **STAFF** over the next 12 months? **SELF-EMPLOYED:** Which skills do you feel you will need to improve or update over the next 12 months? **PROMPT AS NECESSARY AND CODE ALL THAT APPLY**

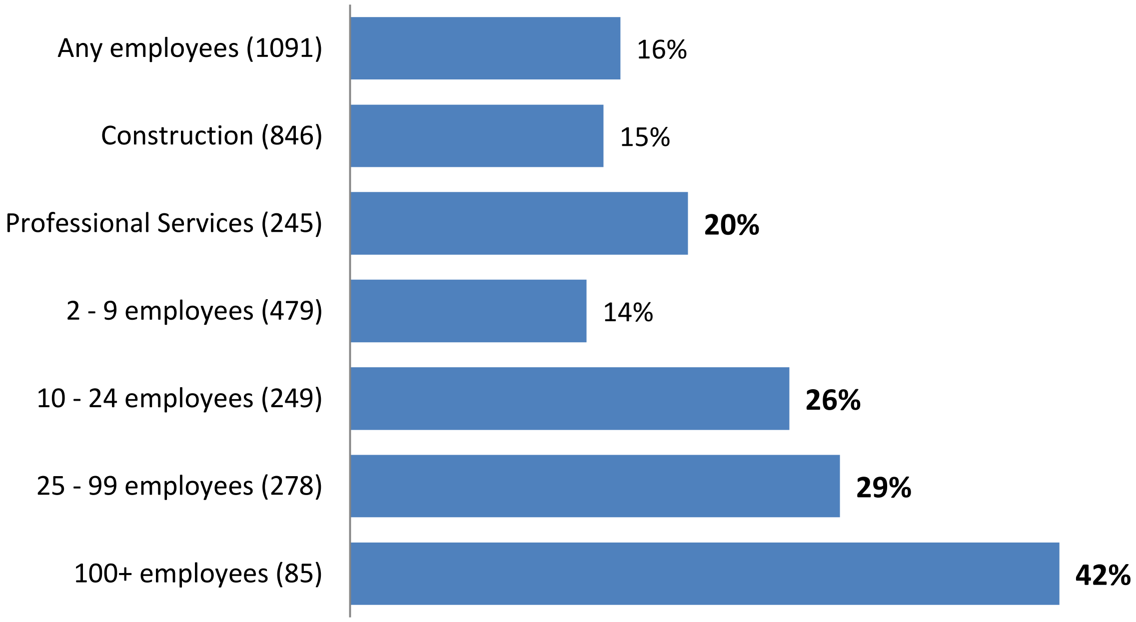
Employers in Wales are particularly likely to identify skills related to green/ecological products and/or practices (20%) as well as, to a lesser extent, sales and marketing skills (11%). By England GOR, employers in the East Midlands are significantly more likely than average to cite skills relating to legislation/regulations (41%), while those in Yorkshire and the Humber are particularly likely to cite health and safety (38%) and management/business skills (34%). Employers in the North West GOR are also more likely than average to mention the need to improve or update health and safety skills (36%) as well as IT/new software skills (29%) and new or different products/markets/branch out (22%).

Migrant workers

Directly employed migrant workers

Sixteen per cent of employers currently directly or indirectly employ any migrant workers i.e. workers who are not UK nationals and have recently moved to the UK from another country. This proportion increases with business size to more than a quarter of employers with between 10 and 99 employees and more than two-fifths of those with 100+ employees. Employers within professional services are significantly more likely than those in construction to employ any migrant workers (20%, compared with 15%).   Just 2% of self-employed individuals indirectly employ migrant workers.

Figure 35: Employment of migrant workers, by business size and sector - (all employers)



Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested.

QD9 Do you currently have any migrant workers working for you, by which I mean workers who are not UK nationals and have moved to the UK from another country? Please include any staff, whether directly or indirectly employed including the self-employed, labour-only contractors, or agency staff

There is no significant variation by nation, but employers within the London GOR are significantly more likely to have migrant workers (42%).

Employers with skills shortages and who have a need to up-skill, as well as those that have seen growth in the size of their workforce in the last 12 months are more likely than average to have migrant workers working for them (20%, 19% and 24% respectively).

Five per cent of all employees are estimated to be migrant workers. By nation and England GOR, the proportion is highest in England (6%), London (13%) and the South East (9%). It is lowest in Wales (1%), Scotland (2%), the North East (less than 1%), the North West (1%), Yorkshire and the Humber (1%) and the South West (2%).

Employers that have identified skill gaps within their workforce are no more likely than those that have not identified skill gaps to employ migrant workers at all. However, migrant workers account for a higher proportion of the workforce within employer businesses where skill gaps have been identified (7%, compared with 3% of the workforce where employers have not identified skill gaps).

Indirectly employed migrant workers

Fourteen per cent of all self-employed, labour only contractors or agency staff are estimated to be migrant workers. The proportion is significantly higher in construction businesses than within professional services businesses (18%, compared with 6%). By nation and England GOR, the proportion is highest in England (16%), the East of England (36%), the North East (21%), London (18%) and the South East (18%).

The proportion of the casual or temporary workforce that are migrant workers is significantly higher than average within businesses that have not recruited at all in the last 12 months (26%), have not trained (22%) and construction businesses that do not offer Apprenticeships (32%). It is significantly higher than average within micro businesses (45% of those with 2-9 employees). This pattern is not evident with regard to migrant workers within the permanent workforce.

EU and non-EU workers

Of those that directly employ migrant workers and were able to provide a response, 94% employ workers from within the EU, while 85% employ workers from countries outside the EU. The majority employ both EU and non-EU workers (83%), while one in nine (11%) employ EU workers only and a very small minority (2%) only employ non-EU workers.

Indirectly employed migrant workers are more likely to originate from within the EU, with 79% of those that employ migrant workers on a self-employed, contractor or agency basis employing any EU migrant workers and just 23% employing migrant workers from outside the EU.

Employment of migrant workers in response to skill shortages and skill gaps

Of those employers that have experienced recruitment difficulties (hard-to-fill vacancies) in the last 12 months, just over a fifth (22%) have recruited or at least tried to recruit migrant workers in order to fill these posts.

The proportion varies little by sector or business size but geographically is particularly high within the West Midlands (55%). It is significantly higher amongst construction businesses that do not offer Apprenticeships than those that do (33%, compared with 13%).

Fewer employers that identify skill gaps within their workforce have recruited or tried to recruit migrant workers to obtain the skills they are lacking among their existing staff (14%). Again, the proportion varies little by sector or business size, but is significantly higher amongst employers with skill gaps that have also experienced recruitment difficulties (19%) than those that have not (5%) and higher amongst construction businesses that do not offer Apprenticeships than those that do (22%, compared with 4%).

6. Workforce Training and Development

This section describes the extent and nature of workforce training and development activity within the construction sector.

Employers and self-employed individuals who had contracted, agency or self-employed staff working for them at the time of survey were asked about training and development of all directly employed or contracted, agency or self-employed staff in the last 12 months.

They were asked to exclude anyone on formal, government-funded Apprenticeships when answering these questions. Apprenticeships are discussed in detail in a later chapter of this report.

Businesses were asked separately about on-the-job and off-the-job training or development activity. On-the-job training is defined as ‘activities that would be recognised as training by staff and not the sort of learning by experience that would take place all the time’. Off-the-job training is defined as ‘training away from the individual’s immediate work position, whether on the premises or elsewhere’.

Provision of training

Two thirds of all employers (67%) have funded or arranged any training, on or off-the-job, informal or formal, for any staff in the last 12 months.

This is higher than the proportion reported in 2016 (64%) and the proportion reported for the construction sector in the UK-wide 2017 Employer Skills Survey (UKCES) (59%).

More than a third of self-employed individuals (38%) have funded or arranged training for themselves or contract workers they are using in the last 12 months. Again, this is higher than the proportion reported in 2016 (31%).

The propensity to have provided any training increases with business size, with 96% of businesses with 100+ employees providing training; there is little variance in the propensity to train by broad sector (construction, 66%; professional services, 69%), although the proportion of employers that have provided training within SIC 41 – Construction of buildings is significantly lower than average (59%), while that within SIC 42 – civil engineering is significantly higher than average (81%).

The provision of training is also at a higher level than the average of 67% among businesses that have taken on new staff, identified skill gaps in their workforces and a need to up-skill in the next 12 months, all of which could result in a need to train:

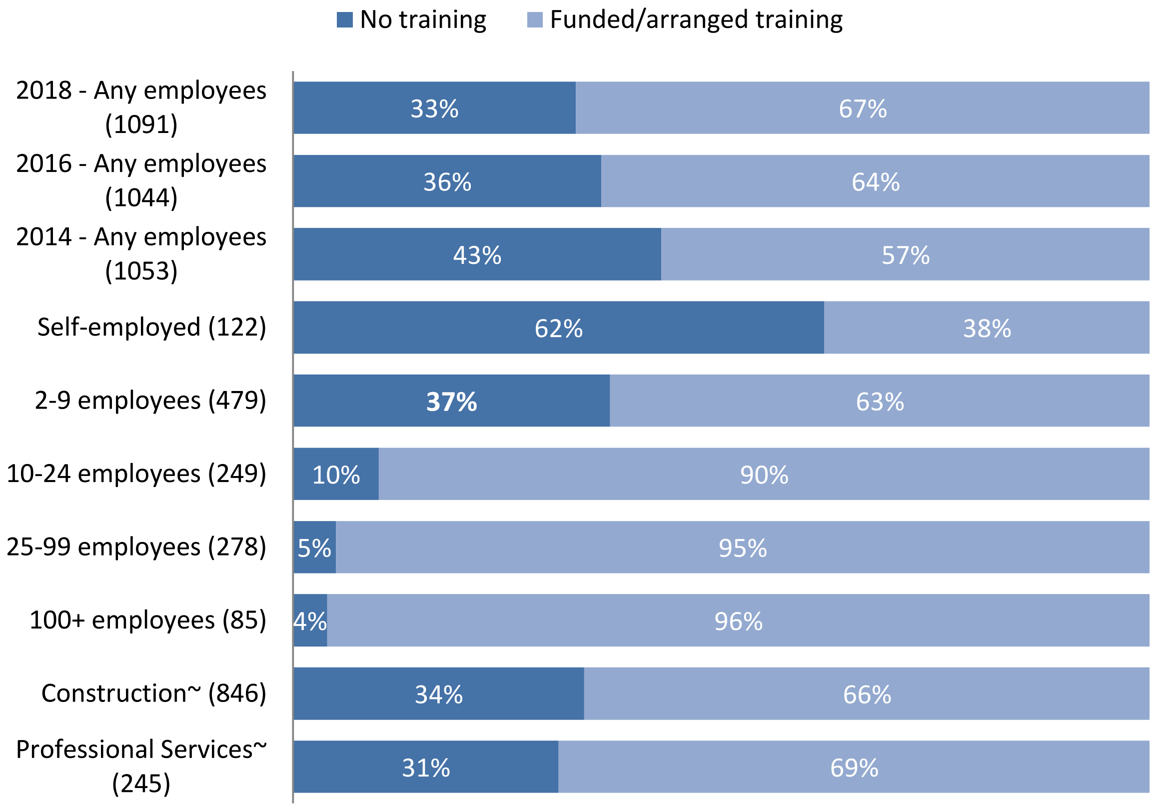
- 79% of those that have recruited in the last 12 months;
- 84% of employers identifying skill gaps;
- 76% of those that need to up-skill staff in the next 12 months.

Construction businesses that offer Apprenticeships are also significantly more likely to provide any training to their workforce (80%, compared with 58% of those that do not train Apprentices[8]), suggesting that the willingness to provide apprenticeship opportunities could be part of a wider programme of workforce skills development.

Businesses that have had hard-to-fill vacancies in the last 12 months are also more likely than average to have provided training (78%), and this may be to counteract the impact of resulting skill shortages, but it is also likely to reflect that larger businesses (in which training is more widespread) are more likely to recruit and to have difficulties recruiting.

Business size is clearly a key factor in the propensity to train but the need to train inexperienced new workers and to respond to skills difficulties is also a major factor.

Figure 36: Proportion of businesses that have funded or arranged any training in the last 12 months, by sector and size (all respondents)



Unweighted sample bases in parentheses ~ based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested.

QF1 Over the past 12 months have you funded or arranged any off-the-job training or development for yourself or staff i.e. training away from the individual's immediate work position, whether on your premises or elsewhere?

QF2 Have you funded or arranged any on-the-job or informal training over the last 12 months (whether for yourself, direct staff, the self-employed or others)?

[8] Respondents were asked to exclude Apprenticeship training when reporting on training and development they provide to their workforce.

On-the-job training

Nearly half of all businesses with employees (47%) have funded or arranged any on-the-job training for any staff in the last 12 months.

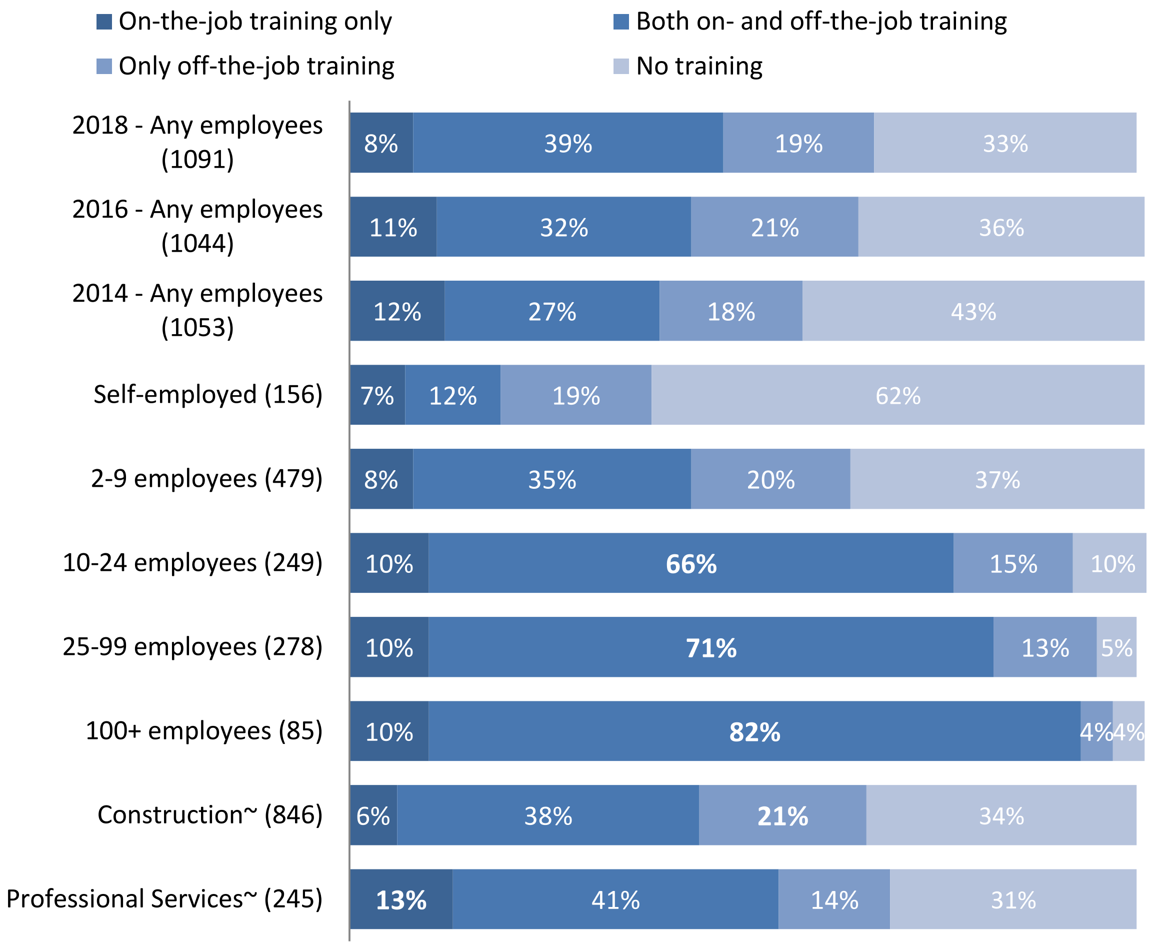
This is a higher proportion to that reported in 2016 (43%) and for the construction sector in the 2017 UK-wide Employer Skills Survey (UKCES) (40%).

Provision of on-the-job training increases with business size to 92% of 100+ employees and professional services are significantly more likely to offer on the job training than construction businesses (55%, compared to 45%).

One in five self-employed individuals (19%; 18% in 2016) has funded or arranged on-the-job training for themselves or contract/agency/self-employed workers in the last 12 months.

The following figure summarises these findings.

Figure 37: Proportion of businesses that have funded or arranged on-the-job training in the last 12 months, by sector and size (all businesses)



Unweighted sample bases in parentheses ~ based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested.

QF2 Have you funded or arranged any on-the-job or informal training over the last 12 months (whether for yourself, direct staff, the self-employed or others)?

There are no significant differences in the propensity to fund or arrange any on-the-job training by nation; England, 48%; Northern Ireland, 45%; Scotland, 46% and Wales 40%. Employers within the South West England GOR are significantly more likely than average to fund or arrange on-the-job training (61%) and the proportions are also high within the North East (54%), North West (53%), London (51%) and East of England (50%).

Scale of on-the-job training provision

On average, employers provided each person trained with 6 days on-the-job training last year. This is a lower average number of days than reported in 2016 (16), but is more in line with the 2014 average of 8.

The mean number of days on-the-job training provided for each trainee in the last 12 months is similar across the construction and professional services sectors (both 6 days), while by nation, the mean number of days spent on-the-job training is highest in Scotland (11 days) and similar across England (6 days), Northern Ireland (5 days) and Wales (5 days).

The mean among self-employed individuals is also 6 days of on-the-job training in the last 12 months.

As a proportion of all employees, 30% have been provided with on-the-job training. This proportion is significantly higher within the professional services sector (40%, compared with 27% in construction).

By nation, the proportion of all employees who have been provided with on-the-job training varies considerably across all four nations:

- England 31%
- Wales 61%
- Northern Ireland 34%
- Scotland 24%

Profile of workforce receiving on-the-job training

Within construction the occupations most likely to receive on the job training were labourers, carpenters/joiners and managers/directors. While within professional services, the occupations most likely to receive on the job training were other engineers, administrative staff, architects and technicians.

Looking at the proportion of employees within each occupation employed that received on-the-job training, the data suggests that building surveyors, civil engineers, mechanical engineers, scaffolders are particularly likely to be on the receiving end of on-the-job training. Few floorers, plasterers and plumbers have received on-the-job training from their employer in the last 12 months.

This is summarised in the table that follows, in which the data is indicative, since some of the bases (which are based on employee numbers rather than employers) are low at below 5,000 employees. Please note that respondents were asked to include staff who have since left their business and as such the proportion of the current workforce that have received on-the-job training in the last 12 months can exceed 100%.

Figure 38: Proportion of employees within occupations that have received on-the-job training in the last 12 months (all employees)

Construction	Weighted base	%	Professional Services	Weighted base	%
Scaffolders	31426	61	Scientists	423	93
Carpenters/joiners	77295	51	Building surveyors	7224	88
Bricklayers	24838	50	Building service engineers	7224	88
Painters/decorators	34799	49	Civil engineers	29548	72
Labourers and general operatives	140178	45	Mechanical engineers	37813	61
Plant and machine operatives	60215	41	Other engineers	62570	53
Roofers	23776	38	Architectural technologists	3548	51
Electricians	58730	37	Quantity surveyors	6983	44
Supervisors	49591	34	Technicians	16864	43
Technical staff	39517	30	Project managers	11252	43
Plasterers	20230	25	Town planners	980	38
Plumbers	42572	22	Architects	20267	29
Floorers	7488	14	Landscape designers	980	0
Cross-sector occupations:					
Managers/directors	158753	37	HR, legal and business professionals	43683	45
Administrative staff	141052	25	Staff with no one main role/multi task	93489	41

F8 And for roughly how many of the [occupation] have you funded or arranged on-the-job training in the last 12 months, including any who have since left?

Off-the-job training

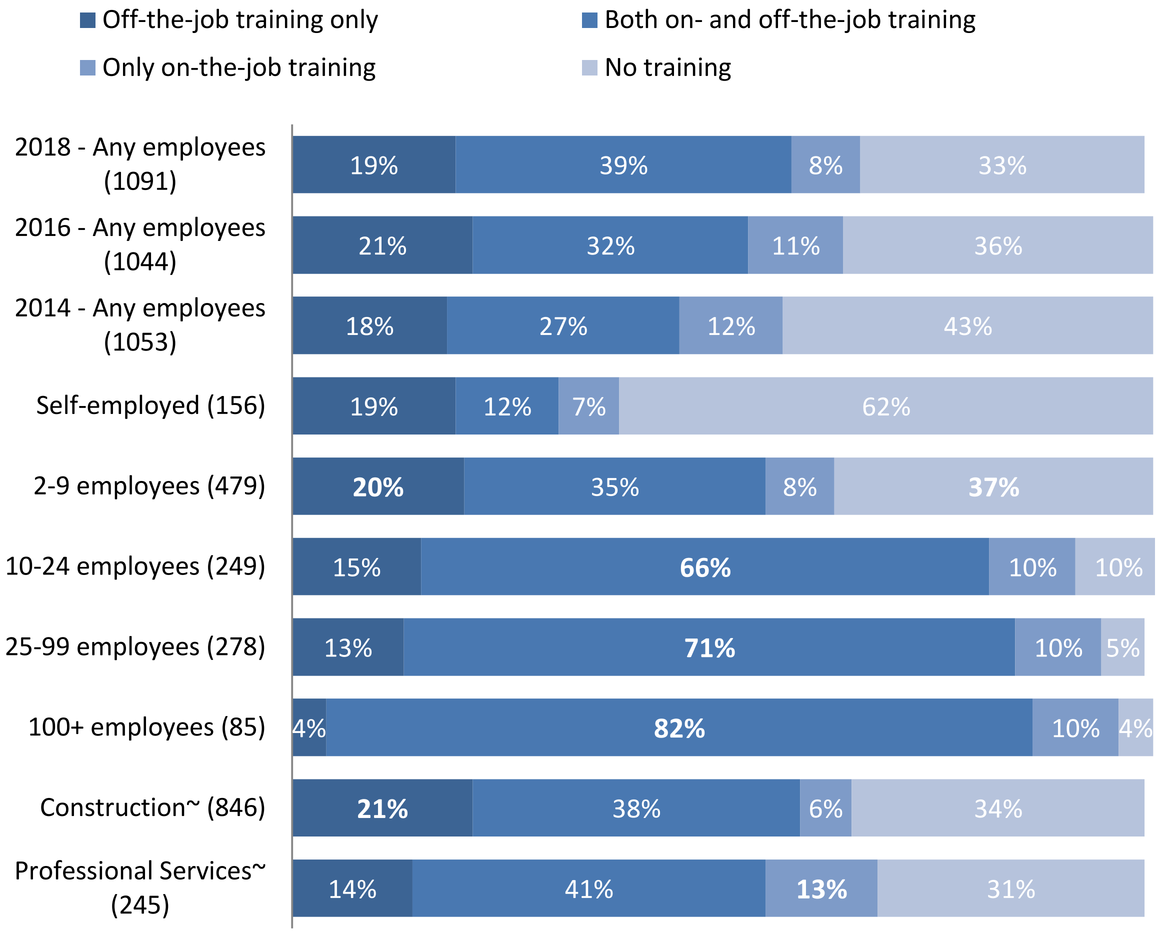
Around three-fifths of all businesses with employees (59%) have funded or arranged any off-the-job training for staff in the last 12 months.

This is a higher proportion than that reported in 2016 (53%) and than that reported for the construction sector in the UK-wide 2017 Employer Skills Survey (UKCES) (47%).

Three in ten self-employed individuals (30%) have funded or arranged any off-the-job training for themselves or contract/agency/self-employed workers in the last 12 months. This compares with 27% in 2016.

The provision of off-the-job training increases to 86% of 100+ employees. There is little difference in the propensity to have provided off-the-job training by broad sector, although the proportion that have funded or arranged off-the-job training is significantly higher within SIC 42 – civil engineering (77%).

Figure 39: Proportion of businesses that have funded or arranged off-the-job training in the last 12 months, by sector and size (all businesses)



Unweighted sample bases in parentheses ~ based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested

QF1 Over the past 12 months have you funded or arranged any off-the-job training or development for yourself or staff i.e. training away from the individual's immediate work position, whether on your premises or elsewhere?

Scale of off-the-job training provision

On average, employers provided each trainee who trained off-the-job with 7 days off-the-job training last year. This is similar to the figure reported in 2016 (6 days).

The mean number of days off-the-job training provided to each trainee in the last 12 months is the same in both construction and professional services sectors (both 7 days). The number of days increases with business size to 18 among 25-99 employers and 19 amongst 100+ employers.

Similarly to on-the-job training, employers in Scotland have provided the highest average number of days off-the-job training per trainee in the last 12 months (10 days).

The mean among self-employed individuals is 6 days of off-the-job training per trainee in the last 12 months.

The UKCES' 2017 Employer Skills Survey suggests that the average number of training days per trainee per year within construction is 6.5 days. This figure is not directly comparable with this survey's estimates because it includes both on- and off-the-job training but it provides a useful benchmark which supports the conclusions that a small number of days is spent in training per trainee.

In terms of the share of time between on- and off-the job training, overall, 62% of days spent was for off-the job training. By sector, off-the-job training predominates within professional services (84% off-the-job; 16% on-the-job), while within construction, on-the-job has the edge (46% off-the-job; 54%; on-the-job).

Off-the-job training is favoured in England and Wales but on-the-job training is favoured in Northern Ireland and off and on-the-job training is split equally, in terms of days spent on either, in Scotland:

- England 62% off-the-job; 38% on-the-job
- Northern Ireland 34% off-the-job; 66% on-the-job
- Scotland 50% off-the-job; 50% on-the-job
- Wales 63% off-the-job; 37% on-the-job

As a proportion of all employees, 37% have been provided with off-the-job training.

This proportion is significantly higher within construction businesses (42%) than within those in professional services (21%).

It varies widely by nation with the proportion of all employees that have been provided with off-the-job training being highest in Wales and lowest in Scotland:

- Wales 54%
- Northern Ireland 46%
- England 36%
- Scotland 32%

Profile of workforce receiving off-the-job training

When we look at the training data as the proportions of people who received training as a proportion of all employees within each occupation, we can see that there is a very high likelihood of plasterers and scaffolders having received off-the-job training in construction. Within professional services, civil engineers have a particularly high likelihood of receiving off the job training. The data in the table below is indicative, since some of the bases (which are based on employee numbers rather than employers) are low at below 5,000 employees.

Figure 40: Proportion of employees within occupations that have received off-the-job training (all employees)

Construction	*Weighted base*	%	Professional Services	*Weighted base*	%
Plasterers	*20230*	61	Civil engineers	*29548*	73
Scaffolders	*31426*	57	Building service engineers	*11110*	65
Roofers	*23776*	53	Architectural technologists	*3548*	55
Labourers and general operatives	*140178*	52	Other engineers	*62570*	53
Bricklayers	*24838*	48	Quantity surveyors	*6983*	36
Plant and machine operatives	*60215*	46	Project managers	*11252*	36
Electricians	*58730*	43	Mechanical engineers	*37813*	24
Carpenters/joiners	*77295*	42	Building surveyors	*7224*	24
Supervisors	*49591*	35	Technicians	*16864*	23
Technical staff	*39517*	29	Scientists	*423*	22
Plumbers	*42572*	20	Architects	*20267*	20
Floorers	*7488*	20	Town planners	*980*	5
Painters/decorators	*34799*	15	Landscape designers	*980*	0
Cross-sector occupations:					
Managers/directors	*158753*	46	HR, legal and business professionals	*43683*	45
Administrative staff	*141052*	25	Staff with no one main role/multi task	*93489*	43

QF5 And for roughly how many of the [occupation] have you funded or arranged off-the-job training in the last 12 months, including any who have since left?

Types of training provision

Businesses that funded or arranged training in the last 12 months were asked about the types and sources of training which they used. Seven in ten employers that trained (70%) funded or arranged training provided by a private training provider, while a similar proportion (69%), delivered training which involved a more experienced worker passing on skills to less experienced staff.

Three-fifths of employers that funded or arranged training in the last 12 months (60%) have encouraged self-learning (where staff study using books, manuals, CD-roms or other materials), while more than half have facilitated other off-the-job training such as courses or formal instruction (54%) and/or training provided by a professional institution.

There is little change compared with 2016, although training is more likely to have been delivered by an industry/federation or similar body this year. The propensity to have provided any type of training increases with business size and professional services businesses are significantly more likely to have delivered training through

external institutions such as HE, manufacturers/suppliers and professional or industry bodies.

Figure 41: Types of training provided – prompted, multiple response (where funded/arranged training)

				Employers						
Column percentages	2018 Employers	2016 Employers	2014 Employers	Construction	Professional services	Self-employed	2-9	10-24	25-99	100+
Training provided by any other private training provider	70%	66%	67%	72%	66%	50%	67%	**81%**	**87%**	**92%**
Learning or training from a more experienced worker on-the-job	69%	71%	68%	69%	71%	34%	67%	**79%**	**79%**	**79%**
Any self-learning	60%	58%	57%	53%	**79%**	65%	60%	57%	64%	**77%**
Other off-the-job training such as courses or formal instruction	54%	55%	52%	53%	54%	41%	50%	**63%**	**74%**	**90%**
Training provided by a Professional Institution	52%	50%	44%	46%	**66%**	49%	50%	52%	**68%**	**78%**
Training provided by a manufacturer or supplier	42%	42%	40%	38%	**54%**	39%	41%	40%	**53%**	**58%**
Training delivered by/ through an industry federation/ body	**36%**	26%	21%	33%	**45%**	23%	35%	40%	**49%**	**51%**
Training delivered by an FE college	19%	20%	16%	18%	23%	9%	16%	**28%**	**41%**	**64%**
Training delivered by the NCC/CITB Northern Ireland	13%	12%	14%	14%	10%	6%	12%	15%	**21%**	**27%**
Training delivered by Higher Education	12%	12%	9%	8%	**24%**	13%	10%	**20%**	**27%**	**53%**
None of these	2%	3%	3%	**3%**	*%	8%	3%	1%	1%	0%
Unweighted bases	*869*	*816*	*738*	*672*	*197*	*43*	*298*	*225*	*265*	*81*

Figures in bold font are significantly higher than average minus the sub-group tested/against previous year

QF17 Still excluding any apprentices, but thinking about all training in the last 12 months, which of the following types of training provision have you or your staff used in the last year? **READ OUT AND CODE ONE FOR EACH**

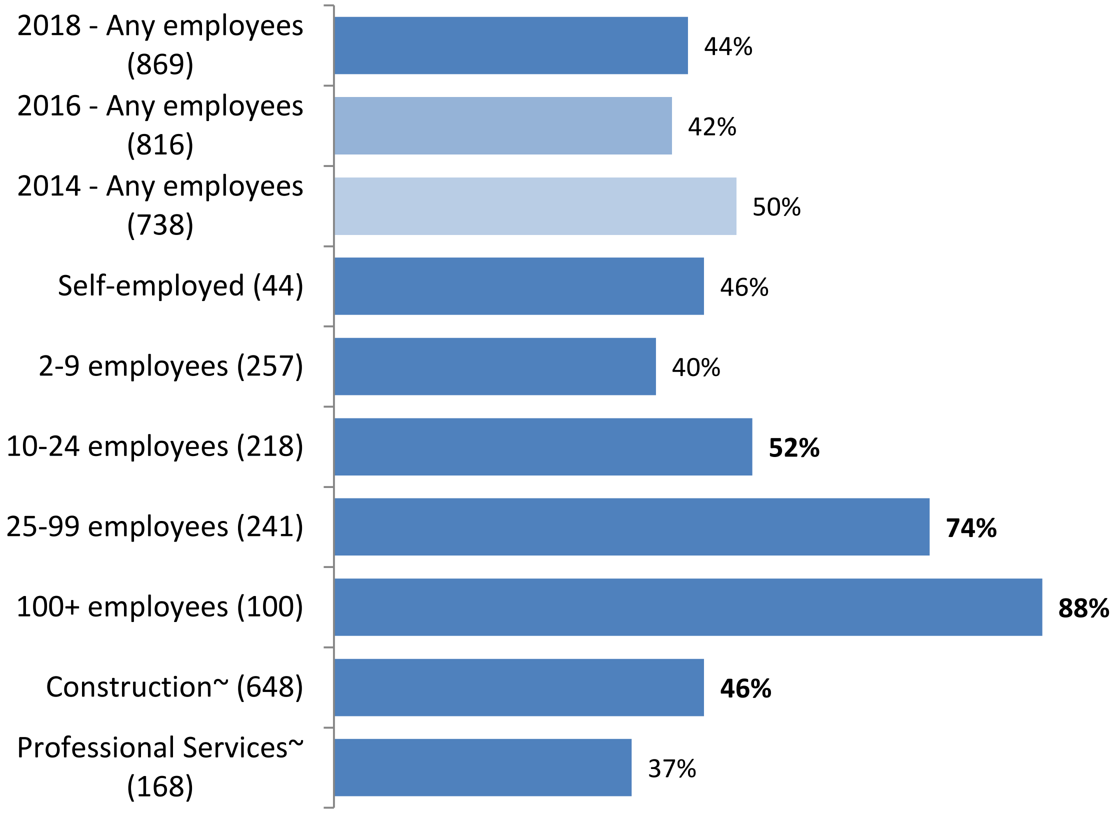
Within Northern Ireland 26% of employers providing training used training delivered by CITBNI compared with a UK average of 13%.

Qualifications-based training

Of all employers that provided training in the last 12 months, 44% provided training towards a nationally recognised qualification. This proportion increases with business size to 88% of those with 100+ employees, and is 46% amongst self-employed individuals. Construction employers are significantly more likely than professional services to provide training towards a nationally recognised qualification (46%, compared to 37%).

Qualifications-based training is at a similar, albeit slightly higher level this year than in 2016 (42%). Furthermore, the overall proportion is below that of the figure reported in the 2016 Employer Skills Survey (UKCES) of 51%.

Figure 42: Proportion of businesses that have trained towards nationally recognised qualifications in the last 12 months, by sector and size (where funded/arranged training)



Unweighted sample bases in parentheses ~ based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested

QF10 **EMPLOYERS:** Thinking now about qualifications, how many people over the last 12 months that you have funded or arranged training for [whether on- or off-the-job,] including labour-only sub-contractors as well as direct employees are or were being trained towards a nationally recognised qualification; such as an NVQ/SVQ? **SELF-EMPLOYED:** Has your training been towards a nationally recognized qualification?

There has been an increase in training towards HNC/HND qualifications since 2016 (9%, compared with 5%) and also with regard to training towards NVQs/SVQs (32%, compared with 29%). Construction employers are more likely to provide NVQs/SVQs than professional services (34%, compared with 25%).

Figure 43: Proportion of businesses training their staff towards nationally recognised qualifications, by sector and size (where funded/arranged training) *based on professional services businesses only

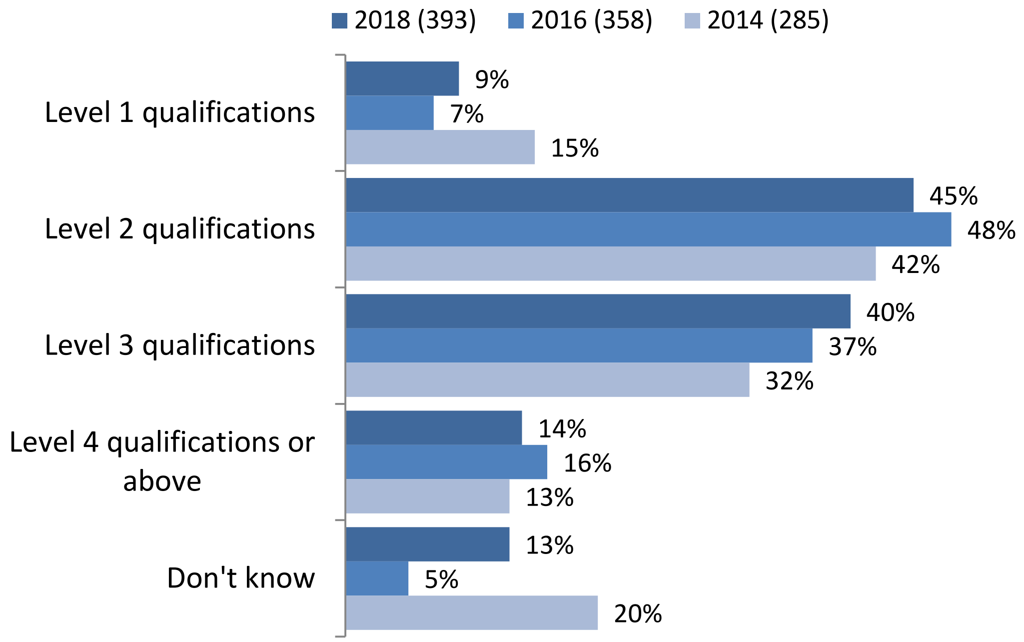
Column percentages	Employers									
	2018 Employers	2016 Employers	2014 Employers	Construction	Professional services	Self-employed	2-9	10-24	25-99	100+
NVQ or SVQ	32%	29%	40%	**34%**	25%	14%	28%	**40%**	**63%**	**71%**
HNC or HND	**9%**	5%	18%	9%	7%	0%	6%	12%	**25%**	**63%**
Degree*	3%	3%	8%	0%	**11%**	2%	2%	5%	**9%**	**16%**
None of these	56%	58%	50%	54%	**63%**	54%	60%	48%	26%	12%
Unweighted bases	*869*	*816*	*738*	*672*	*197*	*43*	*298*	*225*	*265*	*81*

Figures in bold font are significantly higher than average minus the sub-group tested/against previous year

QF11/F14/F15

In terms of the levels of NVQs/SVQs that employees have worked towards, a slightly higher proportion of employers that have trained towards NVQ/SVQs have trained staff towards Level 2 (45%) than Level 3 (40%). However, the gap between these two levels is closing (48% and 37% respectively in 2016).

Figure 44: Level of NVQs/SVQs worked towards (employers that have trained towards NVQs/SVQs)



Unweighted sample bases in parentheses

QF12 And what is the main NVQ/SVQ level you have trained staff towards?

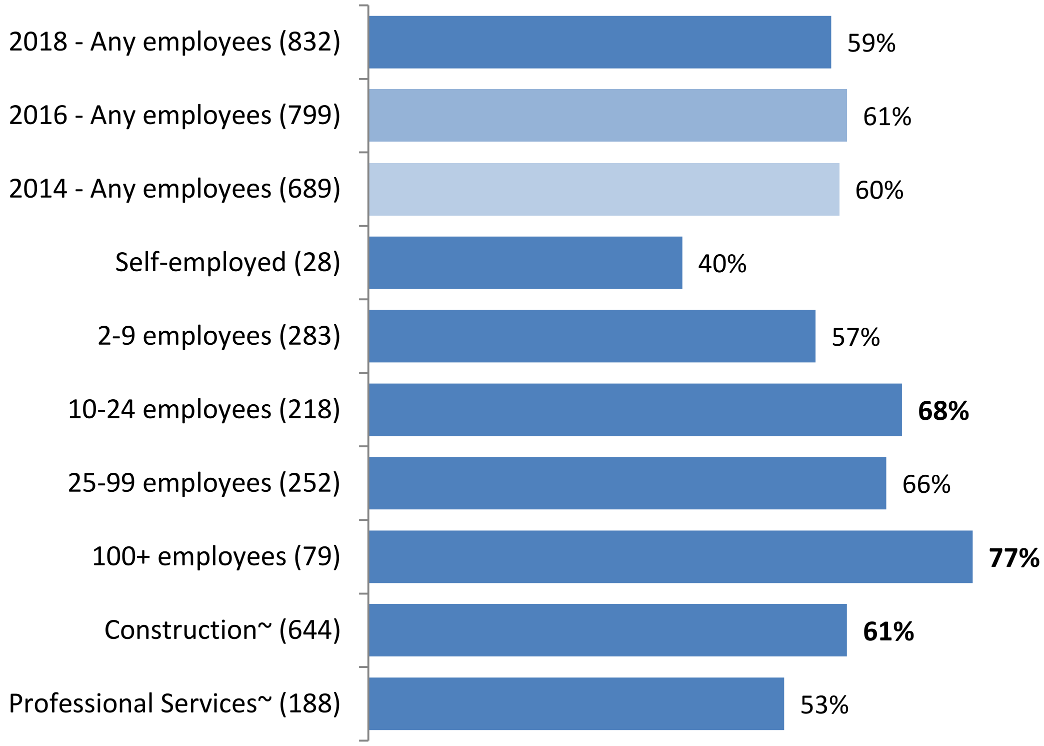
Professional services businesses are significantly more likely than construction businesses to have trained towards Level 4 qualifications (22%, compared with 12%), while construction businesses are significantly more likely to have trained towards Level 2 (49%, compared with 28%). Businesses in these sectors are equally likely to have trained towards Level 3 qualifications.

Assessment of training

Three-fifths of employers that funded or arranged training in the last 12 months (59%) formally assess whether the training and development received has an impact on the trainee's performance. This is similar to the proportion found in 2016 (61%) and 2014 (60%).

The propensity to formally assess training increases with business size to 77% of businesses with 100 or more staff. Employers within the construction sector are significantly more likely than those in professional services (61%, compared with 53%) to formally assess whether the training and development received has an impact on the trainee's performance:

Figure 45: Proportion of businesses that formally assess whether training and development impacts on trainees' performance, by sector and size (where funded/arranged training)



Unweighted sample bases in parentheses ~ based on employers only

Figures in bold font are significantly higher than average minus the sub-group tested

QF16 And does this establishment/business formally assess whether the training and development received by an employee has an impact on his or her performance?

By nation, significantly higher employers in England formally assess whether training or development has impacted on employees' performances (61%) in comparison with other nations (Northern Ireland and Scotland, 51%; Wales 48%). This reflects the 2016 findings.

Barriers to (more) training

Just over a third of employers that funded or arranged any training in the last 12 months (37%) reported that they would have provided more training if they had been able to do so.

The comparable figure amongst self-employed individuals that provided training is 36%.

Compared with the 2016 survey, these figures are both lower (50% of employers; 63% of self-employed individuals in 2016) but they are similar to the figures reported in 2014 (40% of employers; 37% of self-employed individuals in 2014).

Based on their spontaneous, open, responses, lack of funds (51%) and lack of staff time (44%) are the main reasons for employers not providing more training.

A similar picture is reflected among self-employed individuals - lack of funds (50%) and lack of staff time (43%). One in ten employers that have trained mentioned that it is hard to find the time to organise training (10%).

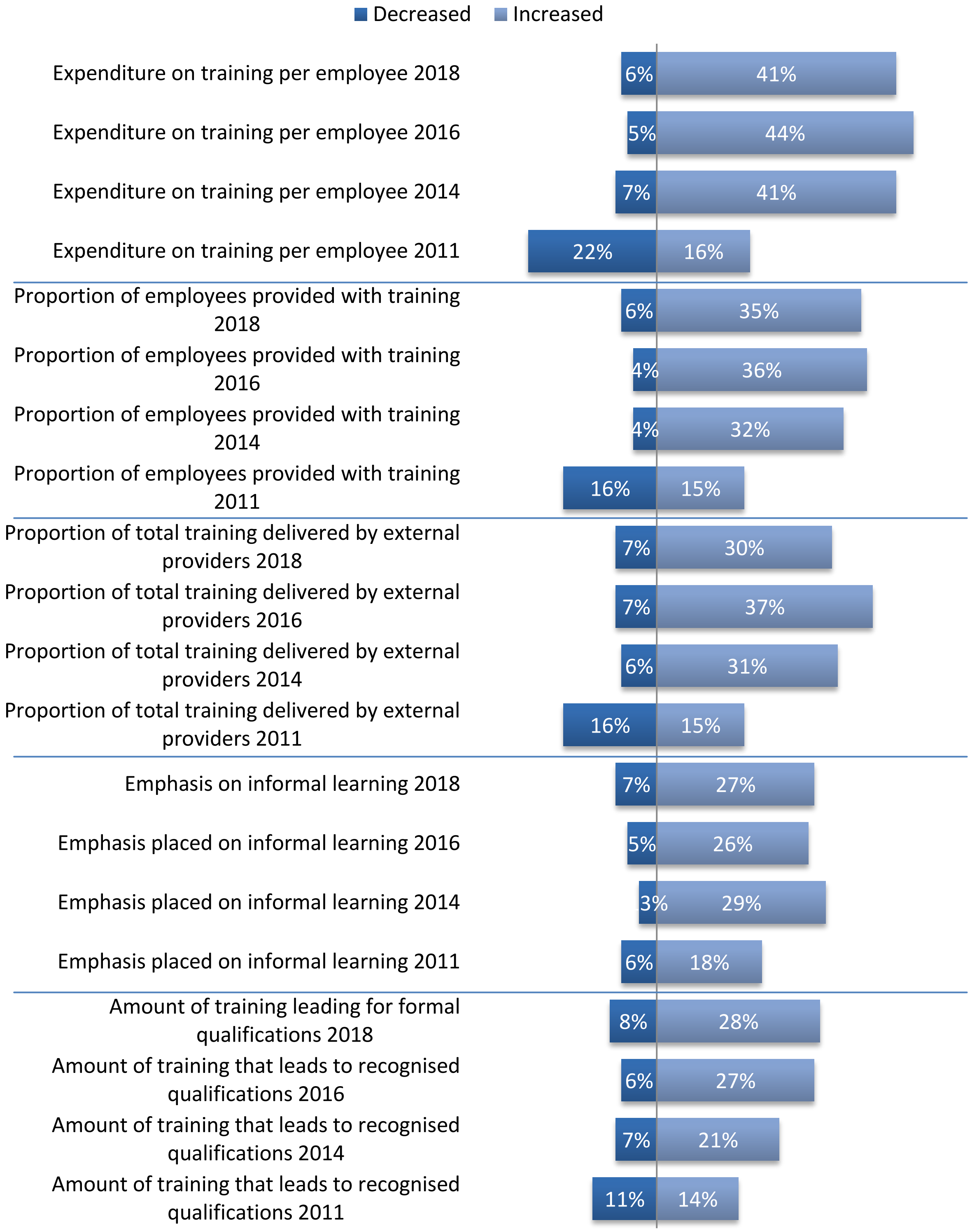
Respondents who had *not funded or arranged training in the last 12 months* were asked for the reasons why they have not done so.

The main reason given for not providing training was that all staff are fully proficient (57%). This is by far the most frequently cited reason, with a further 20% citing no need/no requirement and between 1% and 3% citing other reasons including that staff are too busy to give training, external courses are too expensive, staff are too busy to go on training courses, no locally available courses, poor quality local training and managers lack time to organise training.

Trends in training and training expenditure

Respondents in employing businesses which provide training were asked about changes in their training in the last 12 months. Across a series of indicators, a series of very positive changes from 2011 to 2018 was observed. Proportions of workforces trained, training expenditure per trainee, and propensity to train towards recognised qualifications all increased substantially, as shown in the following figure:

Figure 46: Trends in training expenditure and delivery (employers that have provided training in the last 12 months)



Unweighted sample bases: 2018 = 869; 2016 = 816; 2014 = 604; 2011 = 429

QH1 Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased **READ OUT AND CODE ONE FOR EACH**

By nation, employers in Wales are significantly less likely than the average to have increased expenditure on training per employee (28%, compared with an average of 41%), while those in Scotland are significantly more likely to have reported a reduction in the proportion of employees provided with training (18%, compared with an average of 8%) and a reduction in the proportion of total training delivered by external providers (15%, compared with an average of 7%). Employers in Northern Ireland are significantly more likely to have reported a reduction in the emphasis on informal learning (14%, compared with an average of 7%).

By sector, employers in construction are significantly more likely than those in professional services to have reported an increase in expenditure on training per employee (43%, compared with 34%); an increase in the proportion of the total training delivered by external providers (33%, compared with 22%) and the amount of training that leads to recognised qualifications (30%, compared with 22%).

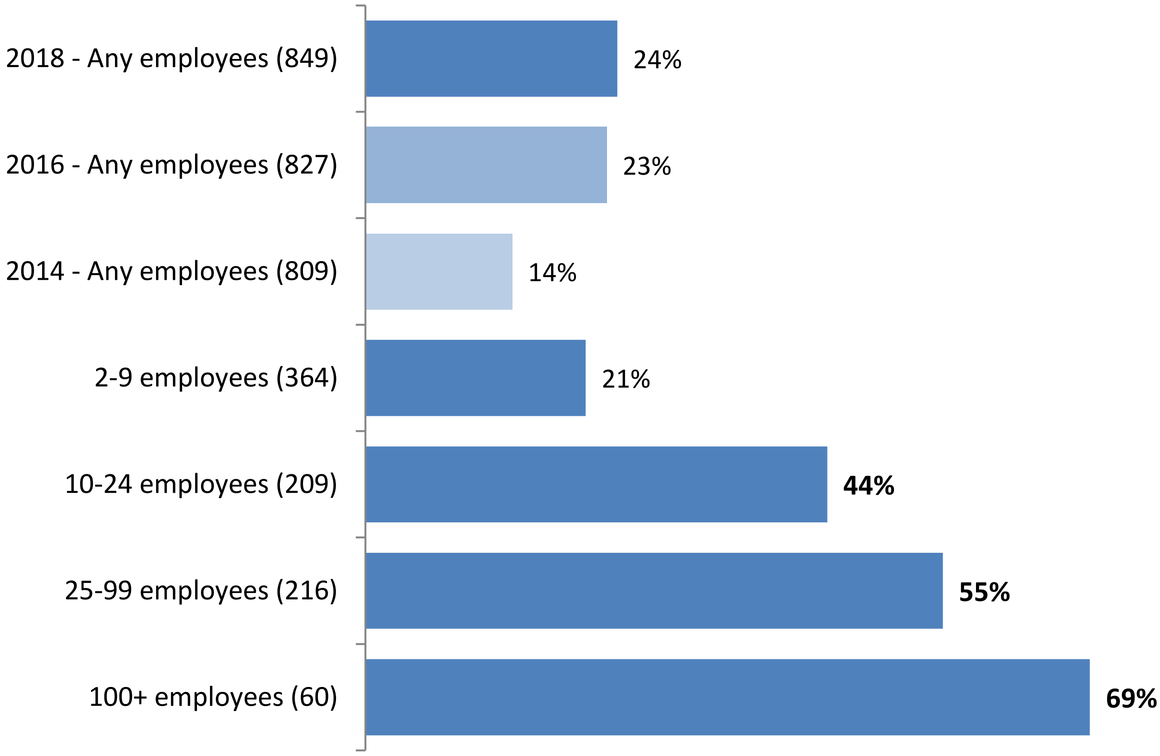
7. Apprenticeships

This section explores the use of Apprenticeships amongst employers and self-employed individuals in the construction sector. In addition, businesses were asked, in relevant cases, why they do not offer Apprenticeships and about the likelihood of offering them in the future.

Take-up of Apprenticeships

Approaching one in four construction employers (24%) currently have staff undertaking them at their site. This is similar to the figure reported in 2016 (23%). The propensity to have Apprentices increases with business size to 69% of 100+ employers. Just 3% of self-employed individuals within construction currently have Apprentices.

Figure 47: Have Apprenticeships (all construction employers)



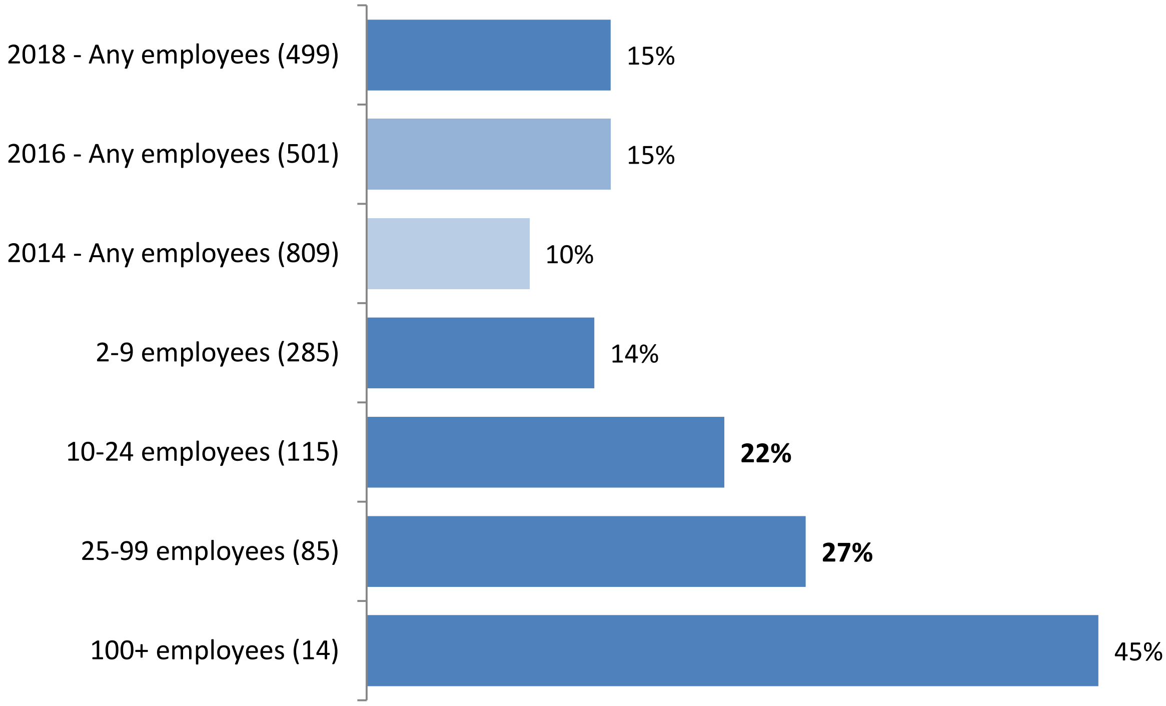
Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested

QG3 Do you currently have any staff undertaking Apprenticeships at this site?

Of those that do not currently have Apprentices, 15% offer them at their site. Again, this echoes 2016, suggesting no change in the propensity to offer apprenticeships in the last 2 years. The propensity to offer apprenticeships increases with business size to 45% of those with 100+ employees who do not currently have apprenticeships working on the site. Again, just 3% of self-employed individuals within construction that do not currently have Apprentices offer them.

Figure 48: Offering Apprenticeships (all construction employers who do not have any apprenticeships at this site)



Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested

QG4 Do you currently offer [SCOTLAND: Modern] Apprenticeships at this site?

On average, employers have 2 Apprentices at their establishment. The average number of Apprentices increases to 14 within the largest construction establishments (100+ employers).

Trend in recruitment of Apprentices and trainees

Employers in the construction sector that offer Apprenticeships were asked if the number of Apprentices and new trainees recruited has changed in the last 12 months. Three in ten (30%) reported that the number has increased, while 14% reported that the number has decreased.

The trend this year is statistically similar to that reported in 2016, when 34% reported an increase in the preceding 12 months and 12% reported a decrease.

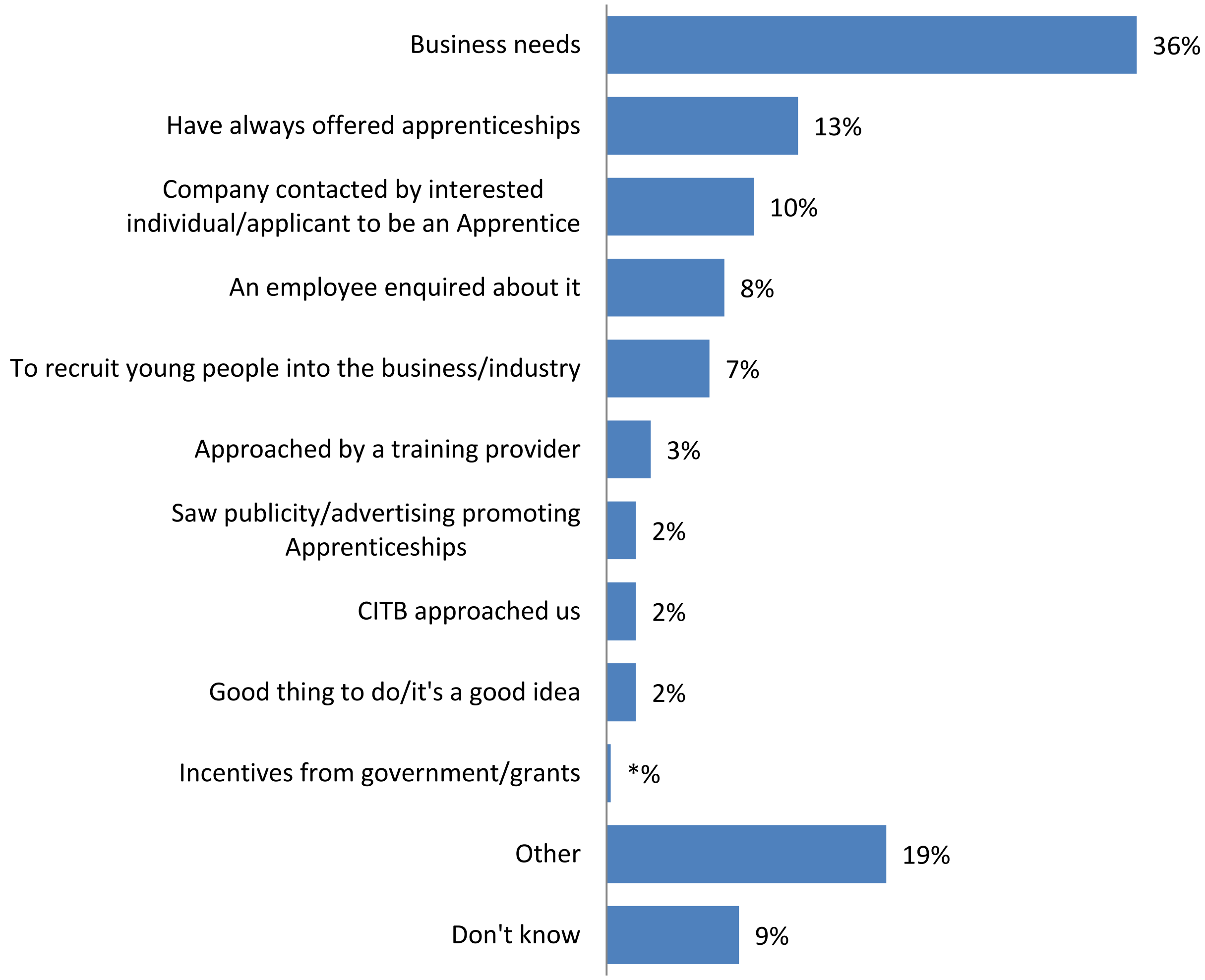
The propensity to have a higher number of Apprentices and new trainees compared with 12 months ago increases significantly with business size, to 47% of 25-99 employers in the construction sector who offer apprenticeships and 60% of 100+ construction employers that do so.

Reasons for offering Apprenticeships

When construction employers that currently have or offer Apprenticeships were asked what led their organisation to start offering Apprenticeships, more than a third (36%) cited business needs. One in eight (13%) said they had always offered

Apprenticeships, while one in ten (10%) were contacted by an individual interested in joining them as an Apprentice.

Figure 49: Reasons for offering Apprenticeships – unprompted, multiple response (all construction employers that have or offer apprenticeships) *denotes less than 0.5%



Unweighted sample base: 423

QG8 What led to your organisation starting to offer Apprenticeships?

Among self-employed individuals within construction that offer apprenticeships, business needs and having been approached by a training provider are the reasons for offering them.

Perceived benefits to offering Apprenticeships

Nearly all construction employers that offer Apprenticeships perceive some benefit to doing so.

More than two-fifths considered that it benefited their business by enabling them to train people the way they want and mould them to how the business operates (42%).

A third saw a benefit to Apprenticeships in improving or maintaining skill levels within the business (31%), while a fifth reported that it improved productivity (20%).

Other perceived benefits included:

- Attracting/recruiting young people (9%), training/offering opportunities to young people (4%);
- Replacing staff that are retiring (9%), maintaining continuity of labour/staff retention (7%);
- Enhancing the business' reputation/corporate image (6%), corporate social responsibility/putting something back into the community (6%);
- Creating a more diverse workforce (5%);
- Saving money by training 'cheaper' apprentices rather than taking on experienced workers (3%);
- Business expansion/growth (2%); and
- Providing a quality/professional service (2%).

Self-employed individuals that offer Apprenticeships consider the main benefits to be improving or maintaining skill levels and improving productivity, while corporate social responsibility is a factor for one respondent.

Likelihood of future provision of Apprenticeships

When asked about the likelihood that someone will start an Apprenticeship at their establishment in the next 12 months, more than a quarter of all construction employers (28%) said it was quite/very likely. This includes 14% of all construction employers considering it very likely.

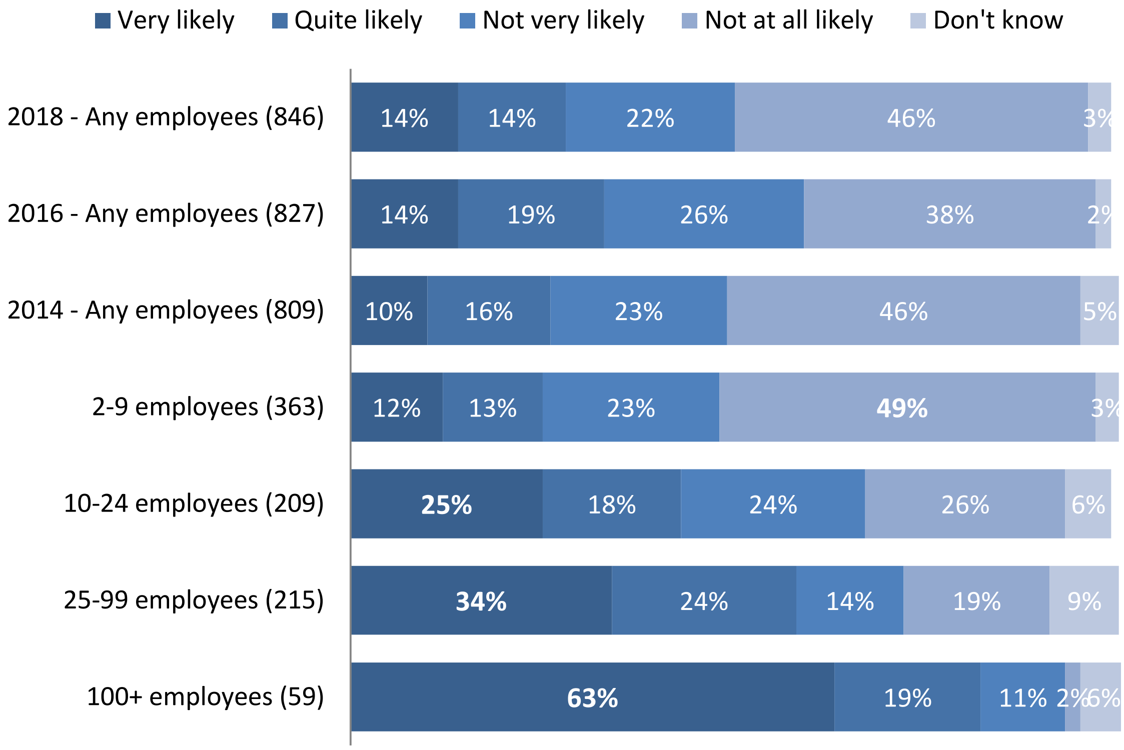
Fewer employers consider it likely that they will take on apprentices in the next 12 months than in 2016 (33% then, including 14% saying very likely).

The likelihood of having new Apprentices in the next year increases significantly with business size to 58% of 25-99 employers and 82% of 100+ employers.

By nation, there is an indication that employers in Scotland are more likely than average to consider it likely that they will have someone starting an Apprenticeship in the next 12 months (49%).

Just 6% of self-employed individuals within construction think it is likely they will take on Apprentices in the next 12 months.

Figure 50: Likelihood of offering Apprenticeships in the next 12 months, by business size (all construction employers)



Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested

QG8 Thinking about the next 12 months, how likely is it that this establishment will have someone starting an Apprenticeship? **PROMPT AS NECESSARY AND CODE ONE ONLY**

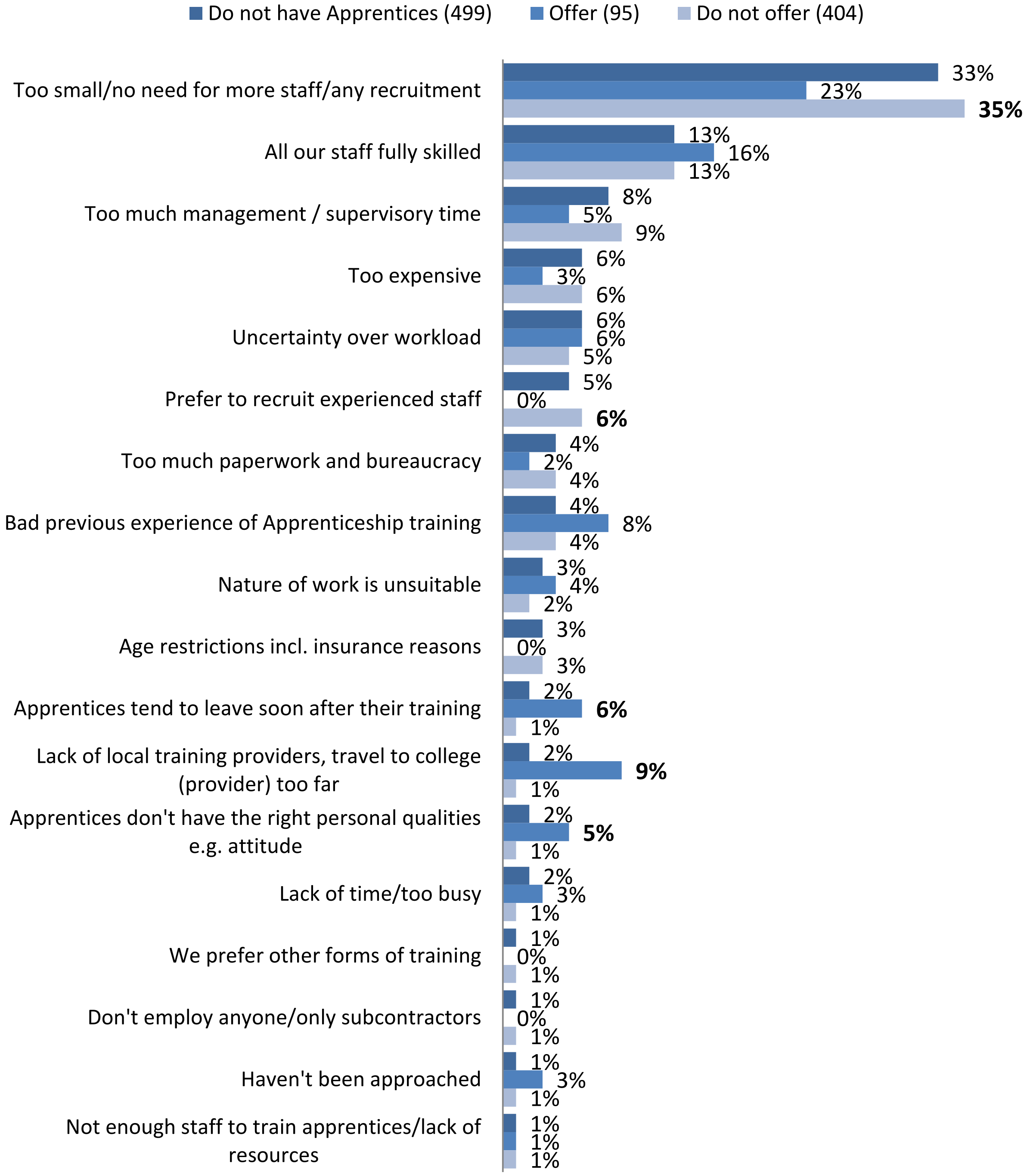
In terms of the likelihood of employers that do not currently have Apprentices taking them on in the next 12 months, 19% of those who do not currently have Apprentices consider it likely (very likely/quite likely) that they will take one on in the next 12 months, while 13% of those that do not currently offer them at all consider it likely they will start doing so. These figures compare with 56% of employers that currently have Apprentices and 58% of those that currently offer them but did not have someone on an apprenticeship at the time of the interview.

Reasons for not offering Apprenticeships

Construction employers that do not currently have apprentices were asked why this was the case. A third (33%) said their business was too small, that there was no need for more staff and any recruitment. One in eight (13%) said that all their staff are fully skilled (i.e. no need for apprentices/trainees).

Responses are summarised in the figure that follows. Lack of need or capacity is highlighted as a particularly significant reason for not offering Apprenticeships among those that never do. Amongst those that offer Apprenticeships but do not currently have them, poor past experience or difficulties in administering training are significantly more likely to be mentioned.

Figure 51: Reasons for not currently having Apprenticeships – unprompted, multiple response (all construction employers that do not currently employ apprentices)



Unweighted sample bases in parentheses

Figures in bold font are significantly higher than average minus the sub-group tested

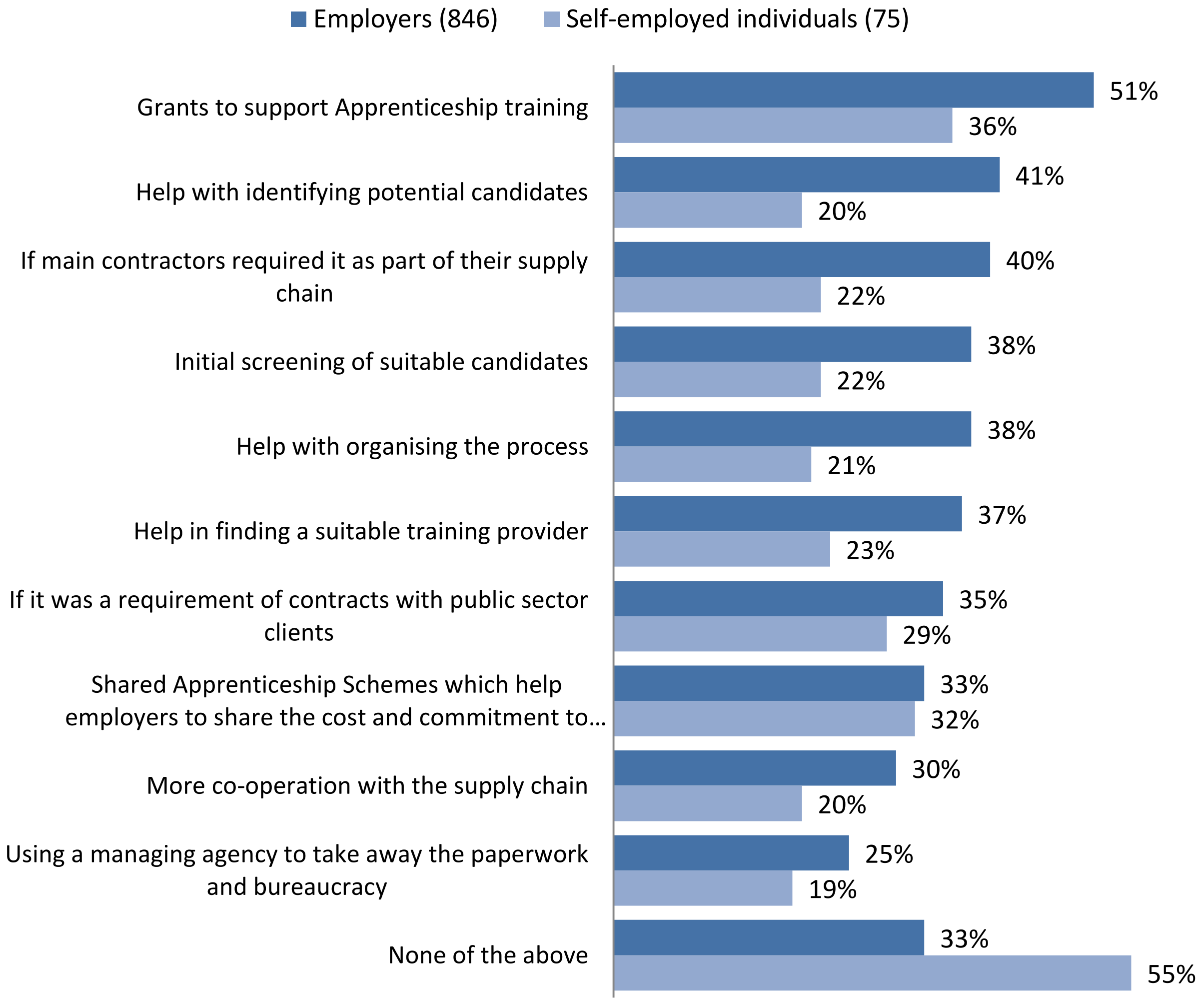
QG9 What are the main reasons why you do not [currently] offer Apprenticeships?

Ways in which employers could be encourage to take on Apprenticeships

When all construction businesses were asked how they could be encouraged to take on Apprenticeships (or more Apprenticeships), they were most likely to highlight grants to support Apprenticeship training (51% of employers; 36% of self-employed individuals). Around two-fifths of employers and around a fifth of self-employed individuals would be encouraged by other specified ways, while a third of both employers and self-employed individuals would take on (more) Apprenticeships, they say, if there were shared Apprenticeship Schemes which help employers to share the cost and commitment to taking on an apprentice, with the possibility of taking one on for as short a duration as 3 months.

A quarter of employers and a fifth of self-employed individuals were in favour of using a managing agency to take away the paperwork and bureaucracy.

Figure 52: Ways in which construction businesses could be encourage to take on (more) apprenticeships – prompted, multiple response (all construction businesses) *denotes less than 0.5%



Unweighted sample bases in parentheses

QG9 What are the main reasons why you do not [currently] offer Apprenticeships?

Strategies for encouraging businesses to take on apprentices need to differ based on whether they already support Apprenticeships. Those that already have or offer Apprenticeships are significantly more likely than those that do not to feel that any of the activities would encourage them to take more on, with the exception of using a managing agency to take away the paperwork and bureaucracy, which is of interest to a quarter of employers across the board.

Figure 53: Ways in which construction businesses could be encourage to take on (more) apprenticeships – prompted, multiple response (all construction employers)

Column percentages	Have apprentices	Do not have apprentices	Offer Apprentice ships	Do not offer Apprentice ships
Help with identifying potential candidates	**56%**	37%	**61%**	31%
Initial screening of suitable candidates	**51%**	35%	**57%**	29%
If it was a requirement of contracts with public sector clients	**44%**	33%	**47%**	29%
If main contractors required it as part of their supply chain	**52%**	36%	**54%**	32%
Grants to support Apprenticeship training	**69%**	46%	**70%**	41%
Help in finding a suitable training provider	38%	37%	**46%**	33%
Using a managing agency to take away the paperwork and bureaucracy	23%	25%	27%	24%
Shared Apprenticeship Schemes which help employers to share the cost and commitment to taking on an apprentice short term	36%	32%	**38%**	30%
More co-operation with the supply chain	**37%**	28%	**41%**	25%
Help with organising the process	40%	37%	**48%**	32%
None of the above	11%	**40%**	11%	**44%**
Unweighted bases	*328*	*518*	*423*	*423*

Figures in bold font are significantly higher than average minus the sub-group tested/against previous year

QG10 Would any of the following encourage you to take on [more] Apprenticeships? **READ OUT AND CODE ONE FOR EACH**

8. Discussion

Statistics from the Office For National Statistics (ONS) show that the volume of output from construction rose from an index value of 84.2 in January 2014 to an index value of 102.6 in January 2016, a rise of 18 points, as the economy continued to recover from the 2009/10 Global Financial Crisis.

Between January 2016 and January 2018, this recovery flattened somewhat. The output index rose from the 102.6 figure in January 2016 to 108.4 in January 2018, a much lesser rise in this two year period, of 6 points.

In broad terms, therefore, it would be expected that a range of indicators derived from the three CITB Skills and Training Surveys, in 2014, 2016 and this latest 2018 survey, would reflect this underlying pattern of demand and output.

A first set of indicators, derived from the three surveys, is set out in the table below. These examine not output itself but industry employer reports of the presence or absence of constraint on output.

Figure 54: Constraints on output; percentages of employing businesses

	2014	2016	2018
No current constraint	44%	53%	49%
Uncertainty of demand is a constraint	17%	12%	10%
Labour shortage is a constraint	4%	11%	13%
Any constraint anticipated in the next 12 months	66%	73%	68%
Uncertainty of demand will be a constraint	21%	25%	19%
Labour shortage will be a constraint	7%	14%	15%

These figures show that whereas fewer employers felt that business was constrained in 2016 than in 2014, the ‘unconstrained‘ proportion fell back between 2016 and 2018.

Looking in more detail at the two main constraints on business, uncertain demand and labour shortage, the first of these reduced over the period particularly between 2014 and 2016 but then more slowly to 2018. The second - labour shortage, rose significantly between 2014 and 2016 and then rose more slowly to 2018. These figures, as discussed above, broadly fit with the ONS picture of an industry generally growing more slowly in the 2016-2018 period than between 2014-2016.

Employer anticipation of the immediate future in respect of these indicators is less a matter of fact than of business confidence. Perhaps the most notable finding, however, is that the frequency of anticipated constraint, and, particularly, of constraint due to uncertain demand, have both reduced since 2016. It would seem

that a Brexit effect on business uncertainty is not particularly evident in the construction sector or, at least, that any such effect is outweighed by positive perceptions of other aspects of the business environment.

Alongside this, the labour shortage concern has increased in frequency only marginally since 2016. Again, it appears that any concerns about the availability of migrant labour arising from Brexit are not, as yet, impacting on this indicator to any great degree.

A further set of comparisons related more directly to labour and skills supply is shown in the next table.

Figure 55: Employment, recruitment and skills indicators: percentages of employers

	2014	2016	2018
Employment increased in last 12 months	19%	24%	25%
Employment decreased in last 12 months	10%	10%	11%
Tried to recruit skilled labour in last 12 months	39%	46%	46%
Recruited any staff in the last 12 months	33%	40%	39%
Had shortage of skilled workers in the last 12 months	13%	18%	17%
Had hard-to-fill vacancies in the last 12 months	36%	47%	47%
Have current skills gaps	8%	20%	14%

These figures show a very clear correlation with the industry volume-of-output trend discussed above. Essentially, all the indicators show a marked tightening of the labour market between 2014 and 2016 with increased recruitment levels and increased difficulty in finding the necessary staff. The 2018 figures now show a basic ‘no change’ scenario for the 2016-2018 period with labour market pressures now stabilised as output growth has slowed (and, perhaps, as industry training and continued in-flow of migrant labour have allowed the supply of skills to improve).

The frequency of skills gaps, which more than doubled between 2014 and 2016, has subsequently fallen back. The main cause of skills gaps is the presence of newly-recruited staff either in a period of adjustment to their new jobs or in initial training with the new employer which is not yet complete. Both these circumstances are essentially a ‘recruitment rate’ effect. With a period of rapid recruitment in the more expansionary 2014-2016 period, it would be expected that the frequency of skills gaps would rise; whereas, as labour turnover and recruitment rates stabilised in the 2016-2018 period, more staff in the industry would be fitted into settled industry roles and, hence, skill gaps would reduce in frequency.

Irrespective of the particular and varying dimensions of the recruitment and skills indicators above, a number of broad characteristics of these issues remain evident (particular statistics on these being available in previous chapters of this report). For example:

- The overall number of skills shortages and gaps in particular occupational areas remains largely determined by the volume of particular trades in the industry. There may be particular problems which would be revealed by knowledge of the ratio of skills problems to actual number of jobs in the industry for each trade (a ratio which may vary by region and locality). However, at the gross level at which this survey deals, it is simply evident, for example, that there are many more hard-to-fill vacancies for wood trades and bricklayers than, say, for glaziers or floorers, almost inevitably as consequence of the relative volume of employment in such groups.
- It is also evident that skill difficulties, in employers' eyes, do not widely arise from lack of qualifications but from lack of skills and experience; and when asked what 'skills' are lacking, employers are three times as likely to mention failings in attitude and motivation as to mention technical or job-specific skills. Essentially, the industry's historic difficulties in attracting talented and committed people in sufficient numbers, despite efforts to promote the industry as offering a high-quality and technologically advancing work environment, have not been wholly dispelled.

In the light of the previous point, the survey investigated the extent to which employers in the industry are taking steps in their recruitment and workforce development practices which should increase the overall volume and quality of skills supply. The following table sets out some key indicators:

Figure 56: Apprenticeships and training indicators: percentages of employers

	2014	2016	2018
Employs apprentices	14%	23%	24%
Trained any staff in last 12 months	57%	64%	67%
Supplied off-the-job training in the last 12 months	45%	53%	59%
Average days in off-the-job training	5	6	7

It can be seen that all these indicators are positive, showing increasing frequency of employer training and, particularly, increasing frequency and length of formal off-the-job training. As yet, the wider problem, across the UK economy, of a reduced number of apprenticeships following the apprenticeship reform programme and the introduction of an apprenticeship levy, do not appear to have had a particularly adverse effect on construction apprenticeships.

Overall, thus, comparison of the CITB Skills and Training Survey 2018 with its two immediate predecessor surveys shows a number of output-related and skills indicators which are broadly consistent with ONS statistics showing slower industry growth in the last 2 years than in the 2 years before that. Thus, the incidence of recruitment and skills problems, which generally correlate positively with rising levels of demand for the industry's outputs, has essentially stabilised in the more recent period after significant increase between 2014 and 2016.

Encouragingly, however, the frequency with which employers act to improve skills supply in the industry has not correspondingly levelled off but has continued to increase; and, thus, to support the CITB's and the industry's aspirations to establish a professionalised workforce adapted to an industry in which innovation in technology and working practices is rapidly advancing.

Appendix 1: Data weighting

At the pre-analysis stage, to adjust for the deliberate imbalances introduced into the sample in respect of business size and nation and to correct any minor response biases, population estimates from IDBR were used to weight the data. The employer and self-employed business samples were weighted separately. The self-employed business sample was weighted by sector (2 digit SIC code) and nation/region. Interlocking weights by size and sector (2 digit SIC code) and then nation/region weights were applied to the employer sample. The result of this process in each case is a weighted sample profile that reflects the population profile, as indicated by up-to-date IDBR data. The unweighted and weighted sample profiles are presented in the tables that follow:

Figure 54: Sample profile – self-employed individuals

	n. Interviews achieved	% of all interviews achieved	n. weighted sample	% of population	Weighting factor applied
Construction	**75**	**61**	**79**	**65**	**1.05**
41 – Construction of buildings	28	23	33	27	1.18
42 – Civil engineering	5	4	8	7	1.60
43 – Specialised construction activities	42	34	39	32	0.93
Professional services	**47**	**39**	**43**	**35**	**0.91**
71 - Architectural and engineering activities; technical testing and analysis	42	34	39	32	0.93
74 - Other professional, scientific and technical activities	5	2	4	3	0.80
England	95	78	106	87	1.12
Northern Ireland	8	7	3	2	0.38
Wales	6	5	9	7	1.50
Scotland	13	11	4	3	0.31
South West	7	13	7	6	1.00
North East	5	3	5	4	1.00
North West	8	8	9	7	1.13
Yorkshire and Humber	6	3	7	6	1.17
East Midlands	8	8	10	8	1.25
West Midlands	6	6	6	5	1.00
East of England	14	12	16	13	1.14
London	18	9	20	16	1.11

	n. Interviews achieved	% of all interviews achieved	n. weighted sample	% of population	Weighting factor applied
South East	23	18	26	21	1.13
UK	**122**	**100**	**122**	**100**	**1.00**

Figure 55: Sector and size of the weighted employer sample; numbers

	2-9 employees	10-24 employees	25-99 employees	100+ employees	Total
Construction	**706**	**67**	**28**	**6**	**806**
41 – Construction of buildings	266	24	10	3	**302**
42 – Civil engineering	69	9	6	2	**87**
43 – Specialised construction activities	371	34	12	1	**418**
Professional services	**239**	**29**	**13**	**3**	**285**
71 - Architectural and engineering activities; technical testing and analysis	214	27	12	3	**257**
74 - Other professional, scientific and technical activities	25	2	1	*	**28**
UK	**945**	**96**	**41**	**9**	**1091**

Figure 56: Sample profile – employers

	n. Interviews achieved	% of all interviews achieved	n. weighted sample	% of population	Weighting factor applied
Construction	**846**	**78**	**807**	**74**	**0.95**
41 – Construction of buildings	253	23	303	28	1.20
42 – Civil engineering	107	10	86	8	0.82
43 – Specialised construction activities	486	45	428	38	0.87
Professional services	**245**	**22**	**284**	**26**	**1.17**
71 - Architectural and engineering activities; technical testing and analysis	218	20	256	23	1.18
74 - Other professional, scientific and technical activities	27	2	28	3	1.04
England	857	79	933	85	1.09
Northern Ireland	77	7	31	3	0.40
Wales	75	7	90	8	1.20
Scotland	82	8	45	4	0.55
South West	105	10	101	9	0.96
North East	46	4	38	3	0.83
North West	90	8	81	7	0.90
Yorkshire and Humber	71	7	67	6	0.94
East Midlands	78	7	78	7	1.00
West Midlands	78	7	89	8	1.14
East of England	148	14	187	17	1.26
London	107	10	125	11	1.17
South East	134	12	166	15	1.24
UK	**1091**	**100**	**1099**	**100**	**1.01**

Employment weighting

A second weighting procedure was also used. Where data is presented based on numbers of employees, such as in the occupational breakdown of the workforce or in reporting the number of employees who have received training, weighting factors have been applied to the employer sample based on IDBR population estimates for employment.

This is necessary because a small number of larger businesses employ a disproportionate large share of the employee population. For example, while 1% of the employer population have 100 or more staff at their site, these businesses account for 24% of employment in the sector.

The unweighted and weighted sample profile following the application of employment weights is set out in the table that follows:

Figure 60: Sample profile – employers

	Unweighted % of workforce	% of employee population	Weighting factor applied
Construction	**77**	**70**	0.91
41 – Construction of buildings	19	27	1.42
42 – Civil engineering	13	15	1.15
43 – Specialised construction activities	45	29	0.64
Professional services	**23**	**30**	1.30
71 - Architectural and engineering activities; technical testing and analysis	22	28	1.27
74 - Other professional, scientific and technical activities	1	2	2.00
2-9 employees	6	36	6.00
10-24 employees	11	17	1.55
25-99 employees	31	22	0.71
100+ employees	52	24	0.46
England	75	83	1.11
Northern Ireland	5	2	0.40
Wales	5	4	0.80
Scotland	16	11	0.69
UK	**100**	**100**	**1.00**

Appendix 2: Data by Nation

Figures in bold font are statistically significantly higher than the UK average. Figures in italics are statistically significantly lower than the UK average.

All data is based on businesses with any direct employees.

*denotes a figure of less than 0.5%.

Sector in which business operates					
Base: All employers					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	1091	857	77	82	75
Construction Sector	74%	74%	*55%*	**84%**	*60%*
Professional Services	26%	26%	**45%**	*16%*	**40%**

No. of employees at that site					
Base: All employers					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	1091	857	77	82	75
2-9 employees	87%	87%	*76%*	86%	82%
10-24 employees	9%	9%	**17%**	6%	13%
25-99 employees	4%	3%	6%	6%	5%
100+ employees	1%	1%	*%	2%	*%

A5 Main business activity Base: All construction employers	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	846	676	48	68	54
New house building	20%	20%	18%	25%	12%
Housing repair, maintenance and improvement, including extensions and loft conversions	40%	39%	37%	**53%**	35%
Commercial and retail work such as shops, offices and leisure facilities	22%	23%	31%	*8%*	29%
Industrial work such as factories and warehouses	7%	7%	4%	8%	9%
Civil engineering and infrastructure projects such as roads, bridges, airports, stadiums etc	4%	5%	3%	2%	1%
Public sector work specifically health and education facilities	3%	3%	2%	1%	5%
Something else	2%	2%	0%	4%	4%
Unsure	1%	1%	4%	0%	3%

A6 Main business activity Base: All professional services employers	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	245	181	29	14	21
Architects	26%	27%	24%	25%	17%
Quantity surveyors	4%	4%	7%	15%	0%
Other surveying	8%	8%	6%	0%	15%
Building service engineers	23%	25%	26%	2%	16%
Civil and structural engineers	14%	14%	13%	5%	28%
Planners/town planners	1%	1%	5%	0%	0%
Project managers	*%	*%	0%	0%	0%
Multi-disciplinary practices	4%	5%	4%	2%	0%
Something else	16%	*14%*	16%	51%	24%

No. of contractor, agency or self-employed staff Base: All employers	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
None	40%	39%	**53%**	41%	49%
1 only	9%	8%	5%	11%	9%
2 - 4	19%	19%	8%	26%	20%
5 - 9	13%	13%	18%	7%	9%
10 - 24	13%	13%	9%	13%	6%
25 - 49	4%	4%	2%	2%	4%
50 - 99	2%	3%	1%	*%	2%
100 - 199	*%	*%	1%	*%	*%
200+	*%	*%	1%	*%	0%

Don't know	*%	*%	2%	0%	0%

B1 What factors, if any, are currently limiting your business? Unprompted, multiple response

Base: All employers

	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
Insufficient demand/uncertainty in the economy	10%	*9%*	15%	**18%**	6%
High level of competition from other companies	4%	4%	7%	3%	1%
Labour shortages	13%	13%	**21%**	7%	10%
Weather conditions	4%	4%	2%	5%	7%
Shortages of materials/equipment	1%	1%	2%	*%	0%
Political situation in Northern Ireland - lack of a devolved government/Stormont stalemate	*%	0%	**4%**	0%	0%
Cash flow	2%	2%	0%	5%	2%
Taxation	1%	1%	0%	*%	0%
Lack of funding/finance	3%	3%	1%	3%	0%
Access to skilled workforce	4%	**4%**	3%	1%	0%
Size of business/premises	1%	1%	0%	0%	*%
Regulations/red-tape	2%	2%	2%	*%	**6%**
Lack of advertising/marketing	*%	*%	**2%**	0%	0%
Late payments from clients	1%	1%	0%	0%	**5%**
Cost of raw materials/equipment	*%	*%	0%	0%	0%
Product pricing	1%	1%	0%	*%	0%
Tendering process	*%	*%	0%	0%	0%
Personal issues (inc. poor health/old age)	1%	*1%*	0%	3%	**5%**
Training issues	*%	*%	0%	0%	*%

Time constraints	1%	1%	0%	3%	0%
Location of business	0%	0%	0%	0%	0%
Availability of land	*%	*%	0%	0%	0%
Political factors inc. EU referendum	1%	1%	1%	0%	*%
Government procurement	0%	0%	0%	0%	0%
Fuel prices	*%	*%	0%	*%	0%
Other	4%	4%	4%	7%	9%
Don't know	2%	2%	3%	1%	2%
B2 And what factors do you think are most likely to limit your business over the next 12 months? Unprompted, multiple response					
Base: All employers					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	1091	857	77	82	75
Insufficient demand/uncertainty in the economy	19%	*18%*	24%	**32%**	15%
High level of competition from other companies	5%	5%	2%	6%	1%
Labour shortages	15%	**16%**	17%	5%	15%
Weather conditions	6%	6%	2%	4%	*11%*
Shortages of materials/equipment	2%	2%	2%	1%	0%
Political situation in Northern Ireland - lack of a devolved government/Stormont stalemate	*%	0%	**3%**	0%	0%
Cash flow	3%	2%	2%	5%	**7%**
Taxation	1%	1%	0%	0%	0%
Lack of funding/finance	6%	5%	2%	**14%**	1%
Access to skilled workforce	5%	5%	6%	1%	5%
Size of business/premises	*%	1%	0%	*%	*%
Regulations/red-tape	2%	2%	2%	*%	4%

Lack of advertising/marketing	*%	1%	0%	0%	0%
Late payments from clients	1%	1%	0%	0%	2%
Cost of raw materials/equipment	1%	1%	0%	0%	0%
Product pricing	*%	*%	0%	0%	0%
Tendering process	*%	*%	1%	0%	0%
Personal issues (inc. poor health/old age)	2%	*1%*	3%	**8%**	5%
Training issues	*%	1%	0%	0%	0%
Time constraints	*%	*%	0%	0%	*%
Location of business	1%	1%	0%	0%	0%
Availability of land	1%	1%	0%	0%	0%
Political factors inc. EU referendum	4%	4%	**12%**	4%	6%
Government procurement	0%	0%	0%	0%	0%
Fuel prices	*%	*%	0%	*%	0%
Other	5%	4%	*%	5%	9%
Nothing	27%	27%	31%	23%	30%
Don't know	5%	5%	5%	5%	8%

C1 Thinking about skills over the last 12 months, which one of the following comes closest to the situation for this establishment? Base: All employers	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
For all or most of the last 12 months we did not have enough skilled workers for the work we had or could have had	9%	8%	**21%**	9%	11%
For some of that time we did not have enough skilled workers	17%	17%	21%	17%	10%
For most of the last 12 months we have been operating at or near full capacity	64%	63%	54%	67%	68%
For most of the last 12 months we have not had sufficient work for our workforce	7%	7%	4%	8%	8%
Unsure	4%	**4%**	*%	*%	3%

C3 In the last 12 months, which of the following steps, if any, have you taken to try and tackle a lack of skilled workers? Base: All employers	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
You have tried to recruit experienced, skilled employees i.e. direct labour	46%	46%	**60%**	45%	38%
You have tried to recruit skilled self-employed or other indirect labour	43%	43%	48%	37%	36%
You have tried to recruit Apprentices or less experienced staff to train up	36%	36%	34%	35%	30%
You have sub-contracted work	56%	57%	51%	64%	*40%*
You have turned work down	42%	43%	42%	42%	36%
You have tried to recruit any skilled or experienced direct/indirect labour	57%	58%	64%	54%	45%
None of these	16%	*15%*	20%	17%	**27%**

C4. In the last 12 months, has this establishment recruited any new direct employees? Base: All employers					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
Yes	39%	*38%*	**55%**	**50%**	*27%*
No	61%	**62%**	*45%*	*50%*	**73%**

C9. You mentioned that you tried to recruit skilled employees/self-employed staff in the last 12 months. Were any of these vacancies hard-to-fill Base: Where have tried to recruit skilled/ self-employed staff					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	852	673	61	69	49
Yes	47%	48%	54%	42%	47%
No	52%	52%	46%	57%	53%
Don't know	*%	*%	0%	*%	0%

D2 & D3. Whether business has skills gaps Base: All employers					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
Have skills gaps	14%	14%	18%	15%	18%
No skills gaps	86%	86%	82%	85%	82%

D9. Do you currently have any migrant workers working for you, by which I mean workers who are not UK nationals and have moved to the UK from another country? Please include any staff, whether directly or indirectly employed including the self employed, labour-only contractors, or agency staff. Base: All employers					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
Have migrant workers	16%	17%	14%	14%	*7%*
No migrant workers	83%	*82%*	86%	86%	**93%**
Don’t know	1%	1%	0%	*%	*%

E1. Over the next 12 months do you expect to need to acquire new skills or knowledge as a result of ...? Base: All employers	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
The development of new products and services	41%	42%	36%	41%	34%
New Eco/Energy saving design/build methods	36%	37%	35%	33%	32%
The introduction of new working practices	48%	49%	41%	40%	49%
The introduction of new technologies or equipment	49%	50%	46%	42%	45%
New legislative or regulatory requirements	57%	57%	52%	59%	57%
Increased competitive pressure	34%	35%	37%	32%	26%
Business management	31%	31%	27%	31%	25%
Environment requirements	41%	42%	38%	38%	36%
Other reasons	6%	6%	*%	5%	4%
Any of these	75%	76%	74%	78%	*65%*
None of the above	25%	24%	26%	22%	**35%**

E3. Which skills do you feel will need improving or updating amongst your staff over the next 12 months? Base: Where have employees that need to acquire new skills or knowledge	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	765	606	57	59	43
Health and safety (inc. asbestos) and first aid	26%	26%	20%	28%	22%
Technical/trade specific	27%	28%	17%	23%	27%
Legislation/regulations	27%	27%	25%	19%	26%
Management/business skills	11%	12%	5%	12%	8%
New or different products/markets/branch out	11%	**11%**	14%	*2%*	7%
IT/new software	14%	14%	14%	13%	23%
Green/ecological products and/or practices	10%	10%	2%	9%	**20%**
Sales/marketing	3%	4%	0%	0%	**11%**
General/all sorts	14%	13%	19%	19%	14%
Other	8%	8%	11%	6%	1%
Nothing to be improved	0%	0%	0%	0%	0%
Don't know	18%	17%	24%	21%	28%

F1/F2. Over the past 12 months have you funded or arranged any off-the-job or on-the-job training or development or informal training for yourself or staff? Base: All employers	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
Off the job	59%	59%	59%	58%	54%
On the job	47%	48%	46%	47%	40%
Both	39%	40%	34%	40%	*26%*
Either	67%	67%	70%	64%	68%
Off the job only	19%	19%	24%	18%	**28%**
On the job only	8%	8%	11%	6%	14%

Neither	33%	33%	30%	36%	32%
F5. Proportion of all staff that have had off-the-job training					
Base: All employees					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	37427	27959	1699	5970	1799
Off-the-job training	34%	**36%**	**46%**	*18%*	**38%**
F8. Proportion of all staff that have had on-the-job training					
Base: All employees					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	37427	27959	1699	5970	1799
On-the-job training	30%	**31%**	30%	*24%*	**39%**
F6/F9. Proportion of days spent doing on or off the job training					
Base: All training days					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	9726	7951	433	854	488
Off-the-job training	57%	58%	**63%**	55%	62%
On-the-job training	43%	42%	*37%*	45%	38%
F10/F11/F14/F15. Whether trained to Nationally recognised qualifications					
Base: All employers					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	1091	857	77	82	75
Nationally recognised qualification	29%	29%	20%	28%	32%
NVQ or SVQ	22%	22%	*13%*	24%	30%
HNC or HND	7%	7%	4%	7%	2%
Degree	2%	2%	4%	*%	3%
None of these	71%	71%	80%	72%	68%

F10/F11/F14/F15. Whether trained to Nationally recognised qualifications Base: Where funded/ arranged any training					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	869	681	61	66	61
Nationally recognised qualification	44%	44%	*29%*	44%	**47%**
NVQ or SVQ	33%	32%	*18%*	37%	44%
HNC or HND	10%	10%	6%	10%	4%
Degree	3%	3%	6%	*%	5%
None of these	56%	56%	**71%**	56%	53%
F16. And does this establishment/business formally assess whether the training and development received by an employee has an impact on his or her performance?					
Base: Where provided training for any staff					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	799	615	61	62	61
Yes	59%	**61%**	51%	51%	48%
No	39%	*37%*	49%	49%	49%
Don't know	2%	2%	0%	1%	3%

F17. Still excluding any apprentices, but thinking about all training in the last 12 months, which of the following types of training provision have you or your staff used in the last year? Base: Where funded/ arranged any training	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	869	681	61	66	61
Training delivered by an FE college	19%	19%	23%	14%	29%
Training delivered by Higher Education (e.g. university)	12%	11%	**25%**	18%	15%
Training delivered by the National Construction College (NCC)/ CITB Northern Ireland	13%	13%	**26%**	8%	*4%*
Training provided by any other private training provider	70%	70%	66%	74%	75%
Training provided by a manufacturer or supplier	42%	42%	38%	41%	49%
Other off-the-job training such as courses or formal instruction	54%	53%	56%	48%	63%
Learning or training where a more experienced worker demonstrates techniques and passes on skills to less experienced staff while working alongside them on-the-job	69%	**71%**	59%	*54%*	75%
Any self-learning where staff study using books, manuals, CD-ROMs or other materials	60%	60%	57%	58%	63%
Training provided by a Professional Institution for example for Continuing Personal Development	52%	51%	40%	57%	**66%**
Training delivered by/ through an industry federation/ body e.g. FMB	36%	36%	27%	39%	33%
None of these	2%	2%	3%	4%	0%

F18. You mentioned that you have not taken up any training over the past 12 months. What are the reasons for this?

Base: Where have not provided training

	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	216	170	16	16	14
The courses interested in are not available locally	1%	1%	8%	0%	0%
The quality of the courses or providers locally is not satisfactory	1%	1%	0%	0%	0%
I don't know what provision is available locally	*%	*%	0%	0%	0%
The start dates or times of the courses are inconvenient	1%	1%	0%	0%	0%
External courses are too expensive	2%	*1%*	12%	9%	0%
Managers have lacked the time to organise training	1%	1%	0%	0%	0%
Employees are too busy to give training	3%	4%	0%	0%	0%
Employees are too busy to go on training courses	2%	2%	12%	0%	0%
All our staff are fully proficient	57%	57%	54%	60%	59%
No need/it's not required	20%	21%	6%	23%	16%
Lack of funding	1%	1%	8%	0%	0%
Training is done internally/on-the-job	2%	2%	0%	0%	0%
Other reasons	10%	11%	12%	0%	9%
No particular reason	9%	*7%*	6%	25%	15%

F19. If you could have done, would you have provided MORE training for staff than you were able to over the last 12 months?

Base: Where funded/ arranged any training

	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	869	681	61	66	61
Yes	37%	38%	32%	35%	34%
No	62%	61%	62%	65%	66%
Don't know	1%	1%	**6%**	0%	0%

G3. Do you currently have any staff undertaking Apprenticeships at this site?

Base: Where in construction and have employees

	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	846	676	48	68	54
Have apprentices	24%	23%	19%	33%	22%
Offer apprenticeship but do not currently have	11%	11%	5%	11%	10%
Do not offer apprenticeships	62%	63%	64%	52%	64%
Don't know	3%	3%	**11%**	4%	3%

G8. Thinking about the next 12 months, how likely is it that you/ this establishment will have someone starting an Apprenticeship?

Base: Where in construction

	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	846	676	48	68	54
Very likely	14%	*13%*	15%	**27%**	15%
Quite likely	14%	*12%*	**27%**	**22%**	21%
Not very likely	22%	**24%**	11%	8%	26%
Not at all likely	46%	**47%**	30%	39%	33%
Don't know	3%	3%	**17%**	4%	4%
Summary: Likely	28%	*25%*	**42%**	**49%**	36%
Summary: Not likely	72%	**75%**	*58%*	*51%*	64%

H1/1. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased : Expenditure on training per employee					
Base: Where funded/ arranged any training					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	869	681	61	66	61
Increased	41%	41%	34%	45%	*28%*
Stayed the same	49%	49%	**66%**	*37%*	61%
Decreased	6%	6%	0%	10%	7%
Don't know	4%	4%	0%	7%	4%

H1/2. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased : Proportion of employees provided with training					
Base: Where funded/ arranged any training					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	869	681	61	66	61
Increased	35%	35%	32%	39%	23%
Stayed the same	56%	56%	60%	*44%*	62%
Decreased	6%	*5%*	8%	**18%**	11%
Don't know	4%	4%	0%	*%	4%

H1/3. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased. : Proportion of any employees' training delivered by external providers					
Base: Where funded/ arranged any training					
	All employers	**England**	**Northern Ireland**	**Scotland**	**Wales**
Unweighted bases	869	681	61	66	61
Increased	30%	31%	32%	25%	34%
Stayed the same	58%	58%	63%	60%	51%
Decreased	7%	*6%*	5%	**15%**	11%
Don't know	4%	5%	0%	0%	4%

H1/4. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased : Emphasis placed on informal learning					
Base: Where funded/ arranged any training					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	869	681	61	66	61
Increased	27%	28%	21%	28%	19%
Stayed the same	59%	58%	60%	58%	68%
Decreased	7%	6%	**14%**	5%	9%
Don't know	7%	7%	5%	9%	4%

H1/5. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased : Amount of training that leads to recognised qualifications					
Base: Where funded/ arranged any training					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	869	681	61	66	61
Increased	28%	29%	20%	24%	19%
Stayed the same	58%	57%	64%	60%	61%
Decreased	8%	7%	11%	11%	13%
Don't know	6%	7%	5%	5%	7%

H1/6. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased : Number of Apprentices and new trainees recruited by your establishment					
Base: All construction employers that offer Apprenticeships					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	423	337	20	39	27
Increased	30%	29%	33%	29%	31%
Stayed the same	56%	56%	61%	60%	38%
Decreased	14%	14%	6%	10%	31%
Don't know	1%	1%	0%	1%	*%

H1/7. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Number of staff employed at your establishment?					
Base: All employers					
	All employers	England	Northern Ireland	Scotland	Wales
Unweighted bases	1091	857	77	82	75
Increased	25%	24%	30%	30%	18%
Stayed the same	62%	62%	61%	58%	68%
Decreased	11%	11%	7%	12%	11%
Don't know	2%	2%	2%	0%	2%

Appendix 3: Data by England GOR[9]

Figures in bold font are statistically significantly higher than the England average. Figures in italics are statistically significantly lower than the England average.

All data is based on businesses with any direct employees.

*denotes a figure of less than 0.5%.

Sector in which business operates Base: All employers	England	East of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Construction Sector	74%	73%	**83%**	*62%*	*60%*	80%	77%	77%	73%	81%
Professional Services	26%	27%	*17%*	**38%**	**40%**	20%	23%	23%	27%	19%
No. of employees at that site										
Base: All employers										
	England	**East of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	857	148	78	107	46	90	134	105	78	71
2-9 employees	87%	90%	85%	89%	87%	87%	89%	82%	87%	83%
10-24 employees	9%	7%	10%	6%	5%	8%	8%	12%	9%	13%
25-99 employees	3%	2%	3%	4%	7%	4%	2%	5%	4%	4%
100+ employees	1%	1%	2%	1%	1%	1%	1%	*%	1%	1%

[9] GOR – Government Office Region

No. of contractor, agency or self-employed staff										
Base: All employers										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	857	148	78	107	46	90	134	105	78	71
None	39%	40%	*26%*	38%	**73%**	**55%**	36%	39%	30%	32%
1 only	8%	4%	6%	13%	0%	6%	12%	10%	7%	12%
2 - 4	19%	**28%**	26%	17%	11%	9%	17%	21%	15%	12%
5 - 9	13%	14%	10%	*7%*	7%	17%	16%	15%	13%	20%
10 - 24	13%	11%	19%	15%	2%	8%	12%	12%	**20%**	20%
25 - 49	4%	2%	**8%**	7%	6%	1%	5%	3%	1%	4%
50 - 99	3%	1%	5%	4%	1%	4%	1%	*%	**11%**	*%
100 - 199	*%	*%	*%	*%	*%	*%	*%	*%	0%	0%
200+	*%	1%	5%	*%	0%	*%	*%	*%	0%	*%
Don't know	*%	0%	*%	0%	0%	*%	1%	*%	*3%*	1%

Main business activity										
Base: All construction employers										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	676	116	65	69	34	77	107	87	60	61
New house building	20%	24%	19%	20%	10%	15%	18%	16%	22%	24%
Housing repair, maintenance and improvement, including extensions and loft conversions	39%	38%	37%	41%	56%	30%	38%	**51%**	38%	34%
Commercial and retail work such as shops, offices and leisure facilities	23%	24%	23%	28%	4%	27%	25%	12%	29%	19%
Industrial work such as factories and warehouses	7%	7%	8%	0%	13%	11%	8%	4%	6%	**16%**
Civil engineering and infrastructure projects such as roads, bridges, airports, stadiums etc	5%	2%	**4%**	7%	**13%**	8%	5%	6%	1%	2%
Public sector work specifically health and education facilities	3%	3%	5%	0%	3%	5%	2%	9%	4%	*%
Something else	2%	2%	3%	*%	1%	4%	3%	0%	1%	4%

Main business activity										
Base: All professional services employers										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	181	32	13	38	12	13	27	18	18	10
Architects	27%	27%	0%	**52%**	33%	32%	20%	5%	11%	40%
Quantity surveyors	4%	5%	0%	6%	0%	10%	0%	11%	0%	1%
Other surveying	8%	3%	20%	11%	11%	0%	11%	0%	5%	20%
Building service engineers	25%	36%	15%	22%	18%	19%	13%	23%	47%	20%
Civil and structural engineers	14%	2%	50%	4%	35%	16%	19%	17%	14%	9%
Planners/town planners	1%	**5%**	0%	0%	0%	0%	0%	4%	0%	0%
Project managers	*%	0%	0%	0%	1%	1%	0%	0%	1%	0%
Multi-disciplinary practices	5%	1%	14%	6%	1%	22%	0%	8%	0%	8%
Something else	14%	15%	1%	*%	1%	1%	29%	33%	23%	2%

B1 What factors, if any, are currently limiting your business? Unprompted, multiple response Base: All employers	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Insufficient demand/uncertainty in the economy	9%	7%	12%	7%	**24%**	9%	9%	8%	11%	10%
High level of competition from other companies	4%	5%	1%	4%	1%	4%	3%	**10%**	*%	1%
Labour shortages	13%	10%	11%	9%	**24%**	9%	11%	**27%**	16%	16%
Weather conditions	4%	4%	1%	2%	6%	*%	5%	6%	6%	6%
Shortages of materials/equipment	1%	1%	*%	2%	**6%**	1%	0%	2%	3%	0%
Political situation in Northern Ireland - lack of a devolved government/Stormont stalemate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Cash flow	2%	3%	1%	5%	*%	3%	2%	0%	*%	4%
Taxation	1%	**2%**	0%	0%	0%	0%	0%	0%	**2%**	0%
Lack of funding/finance	3%	**6%**	0%	*%	0%	3%	1%	0%	**10%**	6%
Access to skilled workforce	4%	2%	6%	5%	6%	3%	2%	7%	**10%**	1%
Size of business/premises	1%	*%	0%	2%	0%	**3%**	0%	0%	0%	3%
Regulations/red-tape	2%	1%	0%	4%	0%	2%	1%	4%	2%	**6%**
Lack of advertising/marketing	*%	0%	0%	0%	0%	0%	0%	**3%**	0%	0%
Late payments from clients	1%	1%	0%	0%	0%	0%	**3%**	0%	0%	0%
Cost of raw materials/equipment	*%	*%	0%	2%	0%	0%	*%	0%	0%	0%
Product pricing	1%	*%	0%	0%	0%	0%	3%	0%	*%	3%
Tendering process	*%	*%	0%	0%	0%	0%	1%	0%	*%	0%
Personal issues (inc. poor health/old age)	1%	0%	0%	0%	0%	0%	1%	2%	2%	0%

Training issues	*%	**1%**	0%	1%	0%	0%	0%	0%	0%	0%
Time constraints	1%	0%	0%	*%	0%	0%	*%	2%	3%	**4%**
Location of business	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Availability of land	*%	**1%**	0%	0%	0%	0%	0%	0%	0%	0%
Political factors inc. EU referendum	1%	0%	*%	5%	0%	*%	2%	*%	0%	0%
Government procurement	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fuel prices	*%	0%	0%	0%	0%	0%	0%	**1%**	*%	0%
Other	4%	**9%**	3%	5%	*%	6%	1%	3%	*%	0%
Nothing	50%	52%	**66%**	47%	32%	**61%**	52%	44%	44%	44%
B2 And what factors do you think are most likely to limit your business over the next 12 months? Unprompted, multiple response										
Base: All employers										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Insufficient demand/uncertainty in the economy	18%	*13%*	**28%**	26%	29%	15%	18%	13%	12%	17%
High level of competition from other companies	5%	4%	7%	**9%**	1%	7%	3%	7%	3%	1%
Labour shortages	16%	14%	17%	10%	20%	16%	14%	**22%**	19%	19%
Weather conditions	6%	6%	6%	*%	1%	3%	**10%**	5%	5%	9%
Shortages of materials/equipment	2%	*%	*%	3%	6%	*%	1%	**4%**	*%	**7%**
Political situation in Northern Ireland - lack of a devolved government/Stormont stalemate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Cash flow	2%	1%	*%	3%	*%	3%	5%	3%	*%	3%
Taxation	1%	1%	**3%**	0%	0%	0%	0%	0%	**2%**	0%
Lack of funding/finance	5%	7%	*%	8%	0%	9%	2%	2%	7%	7%

Access to skilled workforce	5%	4%	3%	5%	2%	9%	5%	9%	7%	6%
Size of business/premises	1%	*%	**3%**	**2%**	0%	0%	0%	0%	0%	0%
Regulations/red-tape	2%	**5%**	0%	2%	*%	**6%**	1%	*%	2%	1%
Lack of advertising/marketing	1%	*%	0%	0%	0%	0%	0%	**5%**	0%	0%
Late payments from clients	1%	0%	0%	0%	**7%**	0%	2%	0%	0%	0%
Cost of raw materials/equipment	1%	1%	0%	0%	0%	0%	**2%**	2%	0%	*%
Product pricing	*%	*%	*%	0%	*%	0%	0%	0%	*%	**3%**
Tendering process	*%	*%	0%	0%	0%	0%	1%	0%	1%	0%
Personal issues (inc. poor health/old age)	1%	2%	3%	2%	0%	2%	0%	*%	0%	0%
Training issues	1%	**2%**	**3%**	0%	0%	0%	0%	0%	0%	0%
Time constraints	*%	0%	0%	0%	*%	0%	0%	0%	**3%**	1%
Location of business	1%	1%	**3%**	2%	0%	0%	0%	0%	0%	0%
Availability of land	1%	0%	**3%**	0%	0%	0%	0%	0%	**2%**	**3%**
Political factors inc. EU referendum	4%	1%	3%	**9%**	1%	5%	**7%**	2%	0%	0%
Government procurement	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fuel prices	*%	0%	**3%**	0%	0%	0%	0%	0%	*%	0%
Other	4%	**8%**	1%	7%	5%	1%	1%	7%	3%	3%
Nothing	27%	29%	26%	19%	35%	26%	23%	34%	35%	29%

C1 Thinking about skills over the last 12 months, which one of the following comes closest to the situation for this establishment? Base: All employers	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	857	148	78	107	46	90	134	105	78	71
For all or most of the last 12 months we did not have enough skilled workers for the work we had or could have had	8%	9%	9%	6%	6%	8%	9%	7%	7%	8%
For some of that time we did not have enough skilled workers	17%	17%	*8%*	16%	8%	24%	22%	16%	20%	14%
For most of the last 12 months we have been operating at or near full capacity	63%	65%	69%	62%	67%	*52%*	61%	70%	62%	67%
For most of the last 12 months we have not had sufficient work for our workforce	7%	7%	9%	7%	**18%**	12%	6%	6%	5%	7%
Unsure	4%	3%	5%	**10%**	1%	5%	2%	1%	6%	4%

C3 In the last 12 months, which of the following steps, if any, have you taken to try and tackle a lack of skilled workers? Base: All employers	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	857	148	78	107	46	90	134	105	78	71
You have tried to recruit experienced, skilled employees i.e. direct labour	46%	47%	50%	43%	38%	47%	48%	*35%*	56%	50%
You have tried to recruit skilled self-employed or other indirect labour	43%	45%	38%	39%	*15%*	43%	50%	47%	47%	43%
You have tried to recruit Apprentices or less experienced staff to train up	36%	32%	42%	33%	32%	34%	33%	44%	39%	40%
You have sub-contracted work	57%	56%	62%	53%	47%	49%	59%	60%	59%	58%
You have turned work down	43%	43%	44%	40%	38%	39%	**52%**	40%	37%	41%
You have tried to recruit any skilled or experienced direct/indirect labour	58%	59%	59%	54%	38%	49%	61%	56%	**69%**	65%
None of these	15%	13%	11%	17%	24%	**23%**	10%	10%	19%	16%

C4. In the last 12 months, has this establishment recruited any new direct employees? Base: All employers	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Yes	38%	37%	30%	40%	35%	39%	35%	40%	32%	**54%**
No	62%	63%	70%	60%	66%	61%	65%	60%	68%	*46%*
Can't recall	3%	3%	1%	4%	1%	4%	1%	4%	*%	6%
Don't know	*%	0%	0%	0%	0%	*%	*%	0%	*%	0%

C9. You mentioned that you tried to recruit skilled employees/self-employed staff in the last 12 months. Were any of these vacancies hard-to-fill										
Base: Where have tried to recruit skilled/ self-employed staff										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	673	116	60	85	36	65	105	86	63	57
Yes	48%	47%	45%	33%	**70%**	**79%**	42%	50%	44%	57%
No	52%	53%	54%	**66%**	*30%*	*21%*	58%	50%	56%	41%
Don't know	*%	0%	*%	1%	0%	1%	*%	0%	*%	2%
D2 & D3. Whether business has skills gaps										
Base: All employers										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Have skills gaps	14%	9%	**28%**	6%	8%	17%	18%	11%	16%	13%
No skills gaps	86%	**91%**	72%	**94%**	92%	83%	82%	89%	84%	87%
D9. Do you currently have any migrant workers working for you, by which I mean workers who are not UK nationals and have moved to the UK from another country? Please include any staff, whether directly or indirectly employed including the self employed, labour-only contractors, or agency staff.										
Base: All employers	**England**	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Have migrant workers	17%	20%	8%	**42%**	8%	14%	13%	*9%*	*7%*	15%
No migrant workers	82%	79%	**92%**	*54%*	92%	86%	86%	89%	**93%**	85%
Don't know	1%	2%	0%	4%	0%	*%	*%	2%	0%	*%

E1. Over the next 12 months do you expect to need to acquire new skills or knowledge as a result of ...? Base: All employers	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	857	148	78	107	46	90	134	105	78	71
The development of new products and services	42%	44%	*30%*	**54%**	29%	37%	48%	38%	35%	40%
New Eco/Energy saving design/build methods	37%	37%	*13%*	**46%**	40%	32%	41%	37%	34%	42%
The introduction of new working practices	49%	46%	49%	55%	47%	46%	53%	**59%**	*34%*	48%
The introduction of new technologies or equipment	50%	52%	45%	58%	59%	59%	49%	50%	34%	44%
New legislative or regulatory requirements	57%	55%	57%	64%	57%	57%	58%	56%	39%	67%
Increased competitive pressure	35%	33%	*20%*	**50%**	27%	33%	33%	34%	34%	43%
Business management	31%	30%	*19%*	**43%**	26%	29%	34%	25%	33%	33%
Environment requirements	42%	42%	31%	**52%**	40%	34%	48%	32%	37%	46%
Other reasons	6%	6%	*12%*	9%	6%	10%	3%	5%	2%	5%
Any of these	76%	76%	72%	78%	82%	76%	76%	80%	*65%*	78%
None of the above	24%	24%	28%	22%	18%	24%	24%	20%	*35%*	22%

E3. Which skills do you feel will need improving or updating amongst your staff over the next 12 months?										
Base: Where have employees that need to acquire new skills or knowledge										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	606	103	59	76	35	63	94	73	51	52
Health and safety (inc. asbestos) and first aid	26%	22%	**37%**	22%	12%	**36%**	23%	23%	23%	**38%**
Technical/trade specific	28%	29%	18%	33%	30%	28%	29%	16%	27%	37%
Legislation/regulations	27%	24%	**41%**	33%	31%	17%	28%	28%	27%	21%
Management/business skills	12%	13%	3%	16%	2%	12%	2%	13%	14%	**34%**
New or different products/markets/branch out	11%	10%	12%	9%	18%	**22%**	8%	11%	13%	8%
IT/new software	14%	18%	12%	12%	22%	**29%**	5%	11%	6%	16%
Green/ecological products and/or practices	10%	15%	*1%*	9%	3%	**18%**	6%	9%	11%	15%
Sales/marketing	4%	1%	7%	**9%**	2%	5%	1%	4%	2%	4%
General/all sorts	13%	16%	6%	16%	12%	18%	15%	5%	10%	14%
Other	8%	10%	5%	**24%**	2%	6%	5%	2%	10%	1%
Nothing to be improved	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	17%	18%	10%	14%	18%	14%	15%	23%	24%	17%

F1/F2. Over the past 12 months have you funded or arranged any off-the-job or on-the-job training or development or informal training for yourself or staff?

Base: All employers

	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Off the job	59%	63%	**69%**	*48%*	57%	65%	62%	52%	55%	56%
On the job	48%	50%	39%	51%	54%	53%	42%	**61%**	*36%*	48%
Both	40%	44%	37%	39%	34%	**50%**	37%	43%	32%	39%
Either	67%	69%	71%	60%	77%	68%	66%	71%	59%	65%
Off the job only	19%	19%	**32%**	9%	23%	15%	24%	*10%*	23%	18%
On the job only	8%	6%	*2%*	12%	**20%**	3%	4%	**18%**	4%	9%
Neither	33%	31%	29%	40%	23%	32%	34%	29%	41%	35%

F5. Proportion of all staff that have had off-the-job training

Base: All employees

	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	27959	3461	4218	3836	1723	3225	3543	3093	2064	2796
Off-the-job training	36%	**36%**	*30%*	**44%**	**38%**	**48%**	**42%**	36%	36%	*20%*

F8. Proportion of all staff that have had on-the-job training

Base: All employees

	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	27959	3461	4218	3836	1723	3225	3543	3093	2064	2796
On-the-job training	31%	*28%*	*23%*	**41%**	**35%**	**48%**	**38%**	*22%*	32%	*15%*

F6/F9. Proportion of days spent doing on or off the job training										
Base: All training days										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	7951	843	477	838	436	936	670	1320	1932	499
Off-the-job training	58%	55%	**72%**	*43%*	**65%**	*47%*	56%	56%	**81%**	54%
On-the-job training	42%	45%	*28%*	**57%**	*35%*	**53%**	44%	44%	*19%*	46%
F10/F11/F14/F15. Whether trained to Nationally recognised qualifications										
Base: All employers										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Nationally recognised qualification	29%	29%	38%	26%	*15%*	35%	30%	35%	*14%*	35%
NVQ or SVQ	22%	18%	28%	22%	13%	23%	24%	24%	13%	27%
HNC or HND	7%	7%	6%	9%	6%	5%	8%	9%	5%	5%
Degree	2%	2%	**6%**	3%	1%	2%	*%	4%	*%	0%
None of these	71%	71%	62%	74%	**85%**	65%	70%	65%	**86%**	65%
F10/F11/F14/F15. Whether trained to Nationally recognised qualifications										
Base: Where funded/ arranged any training										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Nationally recognised qualification	44%	42%	53%	44%	*19%*	52%	45%	50%	*24%*	54%
NVQ or SVQ	32%	27%	39%	36%	17%	34%	36%	35%	23%	41%
HNC or HND	10%	10%	9%	15%	8%	7%	12%	13%	8%	7%
Degree	3%	2%	**8%**	5%	2%	3%	*%	6%	1%	0%
None of these	56%	58%	47%	56%	**81%**	48%	55%	50%	**76%**	46%

F16. And does this establishment/business formally assess whether the training and development received by an employee has an impact on his or her performance?										
Base: Where provided training for any staff										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	647	109	66	66	40	77	99	81	57	52
Yes	61%	54%	60%	64%	58%	67%	61%	67%	55%	67%
No	37%	43%	40%	35%	42%	30%	36%	29%	45%	32%
Don't know	2%	2%	*%	*%	0%	4%	3%	4%	0%	1%

F17. Still excluding any apprentices, but thinking about all training in the last 12 months, which of the following types of training provision have you or your staff used in the last year?										
Base: Where funded/arranged any training										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Training delivered by an FE college	19%	22%	26%	22%	23%	25%	17%	14%	13%	10%
Training delivered by Higher Education	11%	8%	15%	15%	21%	**20%**	*4%*	14%	*2%*	18%
Training delivered by the National Construction College (NCC)	13%	17%	9%	11%	4%	20%	17%	10%	8%	13%
Training provided by any other private training provider	70%	75%	64%	61%	72%	**83%**	68%	73%	71%	*55%*
Training provided by a manufacturer or supplier	42%	41%	31%	47%	**64%**	**59%**	46%	37%	34%	23%
Other off-the-job training such as courses or formal instruction	53%	*44%*	52%	60%	53%	50%	62%	60%	48%	52%
Learning or training where a more experienced worker demonstrates techniques and passes on skills to less experienced staff while working alongside them on-the-job	71%	68%	60%	**85%**	50%	69%	73%	72%	74%	73%

Any self-learning where staff study using books, manuals, CD-ROMs or other materials	60%	64%	46%	**80%**	46%	*47%*	58%	**77%**	59%	*40%*
Training provided by a Professional Institution	51%	53%	52%	59%	56%	46%	45%	53%	39%	54%
Training delivered by/ through an industry federation/ body	36%	43%	42%	41%	23%	26%	**46%**	*23%*	29%	30%
None of the above	2%	2%	**7%**	*%	2%	4%	4%	0%	0%	0%

F19. If you could have done, would you have provided MORE training for staff than you were able to over the last 12 months?

Base: Where funded/arranged any training

	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Yes	38%	36%	*21%*	40%	51%	**52%**	40%	31%	45%	30%
No	61%	64%	**79%**	58%	48%	*48%*	60%	67%	51%	70%
Don't know	1%	1%	0%	3%	1%	*%	0%	3%	5%	0%

G3/4. Do you currently have/offer Apprenticeships at this site?

Base: Construction sector only

	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	676	116	65	69	34	77	107	87	60	61
Have apprentices	23%	18%	19%	23%	29%	27%	27%	30%	14%	28%
Offer apprenticeship but do not currently have	11%	13%	16%	8%	12%	8%	11%	6%	11%	16%
Do not offer apprenticeships	63%	69%	65%	63%	49%	64%	61%	58%	68%	55%
Don't know	3%	*%	1%	6%	**10%**	*%	1%	6%	7%	1%

G8. Thinking about the next 12 months, how likely is it that you/ this establishment will have someone starting an Apprenticeship?										
Base: Where construction sector										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	676	116	65	69	34	77	107	87	60	61
Very likely	13%	12%	11%	**28%**	15%	13%	*7%*	10%	7%	22%
Quite likely	12%	12%	3%	6%	4%	20%	13%	16%	**26%**	6%
Not very likely	24%	23%	21%	14%	**41%**	17%	28%	28%	28%	28%
Not at all likely	47%	52%	**60%**	46%	29%	46%	51%	41%	38%	43%
Don't know	3%	1%	4%	6%	**11%**	4%	1%	6%	1%	1%
Summary: Likely	25%	24%	14%	**34%**	19%	33%	*20%*	26%	33%	28%
Summary: Unlikely	71%	75%	81%	*60%*	70%	63%	79%	69%	66%	71%

H1/1. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Expenditure on training per employee										
Base: Where funded/arranged any training										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Increased	41%	42%	50%	36%	42%	46%	42%	43%	34%	36%
Stayed the same	49%	52%	44%	44%	50%	50%	54%	41%	48%	51%
Decreased	6%	4%	2%	**16%**	7%	*%	2%	10%	6%	7%
Don't know	4%	2%	4%	4%	*%	4%	3%	6%	**12%**	7%

H1/2. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Proportion of employees provided with training										
Base: Where funded/arranged any training										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Increased	35%	34%	36%	32%	31%	41%	38%	38%	24%	35%
Stayed the same	56%	**64%**	63%	56%	61%	*44%*	55%	*45%*	63%	52%
Decreased	5%	*%	1%	10%	7%	8%	3%	**13%**	1%	7%
Don't know	4%	2%	0%	1%	1%	7%	5%	5%	**12%**	6%

H1/3. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Proportion of employees' training delivered by external providers										
Base: Where funded/arranged any training										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Increased	31%	35%	24%	34%	39%	29%	31%	33%	20%	24%
Stayed the same	58%	57%	**71%**	50%	52%	60%	61%	59%	57%	59%
Decreased	6%	6%	1%	11%	7%	4%	4%	7%	7%	6%
Don't know	5%	2%	4%	5%	1%	7%	5%	1%	**16%**	11%

H1/4. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Emphasis placed on informal learning										
Base: Where funded/arranged any training										
	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Increased	28%	32%	23%	**49%**	29%	20%	27%	28%	17%	8%
Stayed the same	58%	56%	66%	*45%*	55%	68%	61%	51%	65%	67%
Decreased	6%	5%	6%	4%	**14%**	*%	7%	10%	5%	12%
Don't know	7%	7%	4%	1%	2%	12%	5%	11%	12%	13%

H1/5. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Amount of training that leads to recognised qualifications										
Base: Where funded/arranged any training										
	England	East Of England	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and Humber
Unweighted bases	681	116	66	76	41	78	103	84	59	58
Increased	29%	22%	**43%**	29%	17%	33%	28%	33%	25%	32%
Stayed the same	57%	61%	55%	54%	**75%**	58%	61%	*47%*	54%	55%
Decreased	7%	9%	*1%*	7%	7%	5%	7%	**14%**	4%	6%
Don't know	7%	8%	*1%*	10%	1%	4%	5%	5%	**17%**	7%

H1/6. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Number of Apprentices and new trainees recruited by your establishment										
Base: Where have direct employees and offer apprenticeships										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	337	59	37	30	21	36	45	50	25	34
Increased	29%	27%	**47%**	14%	46%	*15%*	29%	**45%**	9%	36%
Stayed the same	56%	60%	*24%*	67%	53%	64%	58%	46%	78%	50%
Decreased	14%	13%	20%	18%	1%	21%	13%	9%	14%	14%
Don't know	1%	0%	**9%**	1%	0%	0%	0%	0%	0%	0%

H1/7. Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased: Number of staff employed at your establishment										
Base: All employers										
	England	**East Of England**	**East Midlands**	**London**	**North East**	**North West**	**South East**	**South West**	**West Midlands**	**Yorkshire and Humber**
Unweighted bases	857	148	78	107	46	90	134	105	78	71
Increased	24%	22%	25%	23%	31%	29%	24%	24%	22%	28%
Stayed the same	62%	65%	66%	68%	60%	*52%*	65%	63%	60%	*51%*
Decreased	11%	9%	10%	7%	9%	17%	10%	12%	13%	18%
Don't know	2%	4%	0%	2%	0%	3%	1%	1%	5%	4%

Appendix 4: Questionnaire employed

Construction Sector Skills and Training Survey 2018

ASK TO SPEAK TO THE PERSON WITH OVERALL RESPONSIBILTY OF SKILLS AND TRAINING AT THAT SITE

ASK ALL

Good morning/afternoon, my name is XXX and I am calling from BMG Research, an independent research organisation. We are conducting a major research project on behalf of [ENGLAND/WALES/SCOTLAND: CITB (the Construction Industry Training Board)] [NORTHERN IRELAND: CITB-NI], who are keen to maintain and build on their understanding of the skills needs and training practices of businesses within the construction sector.

The information will be used to inform government and sector policy and planning to ensure that appropriate skills and training are available within the UK construction industry for the next few years. The CITB want to give your business the opportunity to comment on your current skills and training needs and to have direct input into future skills and training strategy for businesses industry-wide. The results will assist the CITB [ENGLAND/WALES/SCOTLAND: in developing programmes to support businesses like yours.] [NORTHERN IRELAND: in supporting businesses like yours.]

Your responses will be treated in the strictest confidence and you won't be identified in any information we pass on to the CITB unless you give your permission. BMG Research abides by the Market Research Society Code of Conduct at all times.

SECTION A: ESTABLISHMENT DETAILS

ASK ALL

A1 Including yourself and any working proprietors, but excluding any contractor, agency or self-employed workers, how many people are on the payroll at this location? **PROMPT FOR A BEST ESTIMATE, WRITE IN**

IF NECESSARY:

Exclude self-employed except for self-employed owner

Include all full and part time staff

Include all partners in a partnership

XX Don't know **THANK AND CLOSE**

YY Refused **THANK AND CLOSE**

ASK ALL

A2 How many contractor staff, agency or self-employed staff are currently working for you? You should include all those managed from this location although they may not necessarily be working at this location **PROMPT FOR AN ESTIMATE, WRITE IN AND CODE TO BANDINGS**

XX Don't know YY Refused

WHERE XX/YY: Which of the following bandings does the number of contractor staff, agency or self-employed staff managed at this location fall into?

0	None
1	1 only
2	2 – 4
3	5 - 9
4	10 - 24
5	25 - 49
6	50 - 99
7	100 - 199
8	200 - 249
9	250 - 499
10	500+
11	Don't know (DNRO)

ASK ALL

A3 I have [**READ OUT SIC DESCRIPTION FROM SAMPLE**] as a general classification for your establishment. Does this sound about right?

1	Yes
2	No

WHERE A3/2

A4 Which of the following comes closest to the main business activity at this establishment? **READ OUT AND CODE ONE ONLY**

IF SAMPLE 'PROFESSIONAL' START FROM CODE 8 (SEE 2ND TABLE), OTHERWISE START FROM CODE 1

FOR CONSTRUCTION (SIC CODES 41-43)

1	Demolition and site preparation (including test drilling or boring)
2	Construction/development of buildings, roads or water projects (whole or part, including civil engineering)
3	Installation and maintenance of fittings and/or insulation **IF NECESSARY:** includes: installation of electrical wiring/fittings for lifts/escalators, insulation, technical repairs and maintenance of fittings and fixtures in buildings/construction projects
4	Floor or wall coverings, including plastering, joinery and painting **IF NECESSARY:** includes plastering, joinery, floor and wall coverings, painting, glazing, other building completion and finishing
5	Renting of construction or demolition equipment, including rental with operator **IF NECESSARY:** includes crane hire
6	Plumbing or electricians
7	Construction-related but none of the above **SPECIFY**

8	Professional services such as architects, surveyors, urban planning, engineering design and consultation etc
9	Not construction related **THANK AND CLOSE: Thank you for your time but we only want to talk to businesses that operate within the construction sector.**

FOR PROFESSIONAL (SIC CODES 71, 74)

8	Professional services such as architects, surveyors, urban planning, engineering design and consultation etc
1	Demolition and site preparation (including test drilling or boring)
2	Construction/development of buildings, roads or water projects (whole or part, including civil engineering)
3	Installation and maintenance of fittings and/or insulation **IF NECESSARY:** includes: installation of electrical wiring/fittings for lifts/escalators, insulation, technical repairs and maintenance of fittings and fixtures in buildings/construction projects
4	Floor or wall coverings, including plastering, joinery and painting **IF NECESSARY:** includes plastering, joinery, floor and wall coverings, painting, glazing, other building completion and finishing
5	Renting of construction or demolition equipment, including rental with operator **IF NECESSARY:** includes crane hire
6	Plumbing or electricians
7	Construction-related but none of the above **SPECIFY**
9	Not construction related **THANK AND CLOSE: Thank you for your time but we only want to talk to businesses that operate within the construction sector.**

WHERE CONSTRUCTION (DATABASE SIC CODES 41-43 OR A4/1-7)

A5 In which one of the following areas has most of your business been in the last 12 months? **READ OUT AND CODE ONE ONLY**

1	New house building
2	Housing repair, maintenance and improvement, including extensions and loft conversions
3	Commercial and retail work such as shops, offices and leisure facilities
4	Industrial work such as factories and warehouses
5	Civil engineering and infrastructure projects such as roads, bridges, airports, stadiums etc
6	Public sector work specifically health and education facilities
7	Something else **SPECIFY**
8	Unsure

WHERE PROFESSIONAL (DATABASE SIC CODES 71, 74 OR A4/8)

A6 Which of the following most closely describes the main activity of this establishment? **READ OUT AND CODE ONE ONLY**

1	Architects
2	Quantity surveyors
3	Other surveying
4	Building service engineers
5	Civil and structural engineers
6	Planners/town planners
7	Project managers
8	Multi-disciplinary practices
9	Something else **SPECIFY**
10	Unsure

SECTION B: OUTPUT CONSTRAINTS

ASK ALL

B1 What factors, if any, are currently limiting your business? By limiting your business we mean limiting your sales and output **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY. AFTER EACH ONE ASK:** Anything else?

1	Insufficient demand/uncertainty in the economy
2	High level of competition from other companies
3	Labour shortages
4	Weather conditions
5	Shortages of materials/equipment
6	Political situation in Northern Ireland – lack of a devolved government/Stormont stalemate
95	Other **SPECIFY**
96	Nothing
97	Don’t know

ASK ALL

B2 And what factors do you think are most likely to limit your business over the next 12 months? **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY. AFTER EACH ONE ASK:** Anything else?

1	Insufficient demand/uncertainty in the economy
2	High level of competition from other companies
3	Labour shortages
4	Weather conditions
5	Shortages of materials/equipment
6	Political situation in Northern Ireland – lack of a devolved government/Stormont stalemate
95	Other **SPECIFY**
96	Nothing
97	Don't know

SECTION C: RECRUITMENT AND HARD TO FILL VACANCIES

WHERE HAVE EMPLOYEES/SELF-EMPLOYED/CONTRACTORS/AGENCY STAFF ((A1/1 AND A2/1+) OR A1/2+)

C1 Thinking about skills over the last 12 months, which one of the following comes closest to the situation for this establishment? **READ OUT AND CODE ONE ONLY**

1	For all or most of the last 12 months we did not have enough skilled workers for the work we had or could have had
2	For some of that time we did not have enough skilled workers
3	For most of the last 12 months we have been operating at or near full capacity
4	For most of the last 12 months we have not had sufficient work for our workforce
5	Unsure

BUSINESSES WITHOUT EMPLOYEES (A1/1 AND A2/0)

C2 Have you tried to recruit any staff in the last year?

1	Yes
2	No
3	Can't recall

WHERE HAVE EMPLOYEES/SELF-EMPLOYED/CONTRACTORS/AGENCY STAFF OR BUSINESSES WITHOUT EMPLOYEES THAT HAVE TRIED TO RECRUIT ANY STAFF ((A1/1 AND A2/1+) OR A1/2+ OR C2/1)

C3 In the last 12 months, which of the following steps, if any, have you taken to try and tackle a lack of skilled workers? **READ OUT AND CODE ONE FOR EACH**

		Yes	No
A	You have tried to recruit experienced, skilled employees i.e. direct labour	1	2
B	You have tried to recruit skilled self-employed or other indirect labour	1	2
C	You have tried to recruit Apprentices or less experienced staff to train up	1	2
D	You have sub-contracted work	1	2
E	You have turned work down	1	2

WHERE HAVE EMPLOYEES OR TRIED TO RECRUIT (A1/2+ OR C2/1)

C4 In the last 12 months, has this establishment recruited any new direct employees?

1	Yes
2	No
3	Can't recall

WHERE TRIED TO RECRUIT OR RECRUITED IN THE LAST 12 MONTHS (C2/1 OR C3A/1 OR C3B/1 OR C3C/1):

C4b For which occupations have you tried to recruit over the last 12 months? **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY. AFTER EACH ONE ASK:** Which others?

	C4b
	Vacancy
CONSTRUCTION SECTOR	
Carpenters / joiners	1
Bricklayers	2
Painters / decorators	3
Plasterers	4
Roofers	5
Floorers	6
Scaffolders	7
Plant and machine operatives	8
Electricians	9
Plumbers	10
Labourers and general operatives	11
Supervisors	12
Technical staff	13

		C4b
		Vacancy
PROFESSIONAL SERVICES		
Architects		14
Architectural technologists		15
Building service engineers		16
Civil engineers		17
Mechanical engineers		18
Other engineers		19
Town planners		20
Technicians		21
Building surveyors		22
Quantity surveyors		23
Landscape designers		24
Project managers		25
Scientists		26
BOTH		
Managers/directors		27
HR, legal and business professionals		28
Administrative staff		29
Staff with no one main role or who multi task		30
Others 1		31
Others 2		32
Others 3		33
Others 4		34
Others 5		35
Others 6		36

WHERE TRIED TO RECRUIT SKILLED/SELF-EMPLOYED STAFF (C2/1 OR C3/A/1 OR C3/B/1)

C9 You mentioned that you tried to recruit skilled employees/self-employed staff in the last 12 months. Were any of these vacancies hard-to-fill?

1	Yes
2	No
3	Don’t know

WHERE HAVE HAD HARD-TO-FILL VACANCIES (C9/1)

C10 In which occupations have vacancies been hard-to-fill over the last 12 months? **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY. AFTER EACH ONE ASK:** Which others?

WHERE HAVE HAD HARD-TO-FILL VACANCIES (C9/1)

C11 Were these hard-to-fill vacancies for **[C10 RESPONSE]** in relation to recruiting direct employees, self-employed or both? **READ OUT EACH C9 RESPONSE AND CODE ONE FOR EACH**

	C10	C11			
	Hard to fill	Direct emp only	Self-emp only	Both only	Don't know
CONSTRUCTION SECTOR					
Carpenters / joiners	1	1	2	3	4
Bricklayers	2	1	2	3	4
Painters / decorators	3	1	2	3	4
Plasterers	4	1	2	3	4
Roofers	5	1	2	3	4
Floorers	6	1	2	3	4
Scaffolders	7	1	2	3	4
Plant and machine operatives	8	1	2	3	4
Electricians	9	1	2	3	4
Plumbers	10	1	2	3	4
Labourers and general operatives	11	1	2	3	4
Supervisors	12	1	2	3	4
Technical staff	13	1	2	3	4
PROFESSIONAL SERVICES					
Architects	14	1	2	3	4
Architectural technologists	15	1	2	3	4
Building service engineers	16	1	2	3	4
Civil engineers	17	1	2	3	4
Mechanical engineers	18	1	2	3	4
Other engineers	19	1	2	3	4
Town planners	20	1	2	3	4
Technicians	21	1	2	3	4
Building surveyors	22	1	2	3	4
Quantity surveyors	23	1	2	3	4
Landscape designers	24	1	2	3	4
Project managers	25	1	2	3	4
Scientists	26	1	2	3	4
BOTH					
Managers/directors	27	1	2	3	4
HR, legal and business professionals	28	1	2	3	4
Administrative staff	29	1	2	3	4
Staff with no one main role or who multi task	30	1	2	3	4

		C10	C11			
		Hard to fill	**<u>Direct</u> emp only**	**<u>Self-emp only</u>**	**Both only**	**Don't know**
Others 1		31	1	2	3	4
Others 2		32	1	2	3	4
Others 3		33	1	2	3	4
Others 4		34	1	2	3	4
Others 5		35	1	2	3	4
Others 6		36	1	2	3	4

WHERE HAVE HAD HARD-TO-FILL VACANCIES (C9/1)

C12 Which of the following do you feel are the main causes of having hard-to-fill vacancies for skilled staff? **READ OUT AND CODE ALL THAT APPLY**

1	Competition from other employers
2	Not enough young people being trained in the construction trades in recent years
3	Low number of applicants generally
4	Applicants lack the skills we require
5	Applicants lack the attitude or motivation we look for
6	Applicants have lacked the work experience we look for
7	Applicants lack the qualifications we look for
8	There are other reasons **SPECIFY**
9	DO NOT READ OUT: No particular reason
10	DO NOT READ OUT: Don't know
11	Not applicable, hard to fill vacancies not for skilled staff

WHERE HAVE HAD HARD-TO-FILL VACANCIES (C9/1)

C13 What have been the two main skills difficult to obtain from applicants? **PROBE FULLY AND WRITE IN**

A	
B	
1	Just one skill/no other skill
X	Don' t know

WHERE HAVE HAD HARD-TO-FILL VACANCIES (C9/1)

C14 Generally speaking, have hard-to-fill vacancies over the last 12 months caused the company to….? **READ OUT CODES 1-5, ROTATE AND CODE ALL THAT APPLY BEFORE ASKING FOR ANYTHING ELSE**

1	Lose business or turn down bidding for work
2	Increase operating costs
3	Increase the use of overtime and the workload for staff generally
4	Outsource work
5	Miss project deadlines
6	What other impacts have there been? **SPECIFY**
7	DO NOT READ OUT: None
8	DO NOT READ OUT: Don't know

WHERE HAVE HAD HARD-TO-FILL VACANCIES (C9/1)

C15 What, if anything, is this establishment doing to overcome the difficulties that you are having finding candidates to fill these hard-to-fill vacancies? **DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY. AFTER EACH ONE ASK:** What else?

1	Increasing salaries
2	Increasing the training given to your existing workforce
3	Redefining existing jobs
4	Increasing advertising/recruitment spend
5	Increasing/expanding trainee programmes
6	Using NEW recruitment methods or channels
7	Recruiting workers who are non-UK nationals
95	What else has the establishment done? **SPECIFY**
96	DO NOT READ OUT: None
97	DO NOT READ OUT: Don't know

SECTION D: SKILLS GAPS

READ OUT: BUSINESSES WITH DIRECT EMPLOYEES (A1/2+)

I'd now like to turn to the skills within your existing, directly employed workforce. Please do not think about any external recruitment problems that you may face.

First of all, I need to understand the different roles that your existing, directly employed staff currently fills at this establishment. Staff should be categorised according to their primary role, i.e. the one that takes up the greatest proportion of their time.

ASK ALL

D1 **BUSINESSES WITH DIRECT EMPLOYEES (A1/2+)** You said earlier that there were **[A1 RESPONSE]** directly employed staff at this establishment. How many of these are mainly employed as…? **PROBE FOR BEST ESTIMATE – DO NOT ACCEPT 'DON'T KNOW'.**

ADD IF NECESSARY: Please include only directly employed staff and not the self employed, labour-only contractors, or agency staff

BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1) In which trade do you mainly work or operate? **PROMPT IF NECESSARY. ALLOW UP TO 2 ANSWERS.**

BUSINESSES WITH DIRECT EMPLOYEES (A1/2+)

D2 Thinking about these directly employed staff, I'd like to know how many you think are fully proficient at their job i.e. able to do the job to the required level. How many of your **[D1 RESPONSE]** existing **[EACH OCCUPATION > 0 AT D1]** would you regard as fully proficient at their job? **ADD IF NECESSARY:** Please include only directly employed staff and not the self employed, labour-only contractors, or agency staff

		D1	D2
	CONSTRUCTION SECTOR		
1	Carpenters / joiners		
2	Bricklayers		
3	Painters / decorators		
4	Plasterers		
5	Roofers		
6	Floorers		
7	Scaffolders		
8	Plant and machine operatives		
9	Electricians		
10	Plumbers		
11	Labourers and general operatives		
12	Supervisors		
13	Technical staff		
	PROFESSIONAL SERVICES		
14	Architects		
15	Architectural technologists		
16	Building service engineers		
17	Civil engineers		
18	Mechanical engineers		
19	Other engineers		
20	Town planners		
21	Technicians		
22	Building surveyors		
23	Quantity surveyors		
24	Landscape designers		
25	Project managers		
26	Scientists		
	BOTH		

			D1	D2
27	Managers/directors			
28	HR, legal and business professionals			
29	Administrative staff			
30	Staff with no one main role or who multi task			
31	Others 1			
32	Others 2			
33	Others 3			
34	Others 4			
35	Others 5			
36	Others 6			
		TOTAL TO EQUAL A1 RESPONSE (IF NOT CHECK)		

BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1)

D3 Do you regard yourself as fully proficient or are there skills you need to develop and improve?

1	Fully proficient
2	Skills need to develop and improve
3	Don't know

BUSINESSES WITH DIRECT EMPLOYEES (A1/2+) WHERE NOT ALL STAFF ARE FULLY PROFICIENT (D2 < D1 (ASK FOR UP TO 2 AND RANDOMLY SELECT 2 OCCUPATIONS IN D2 IF D2 < D1 IN >2 OCCUPATIONS))

D4 I want to ask about up to two of the categories where you say not all staff are proficient]. What are the main causes of some of your **[D2 OCCUPATION]** not being fully proficient in their job…? **DO NOT READ OUT. CODE ALL THAT APPLY**

	D2 OCCUP 1	**D2 OCCUP 2**
Lack of opportunity for training and development	1	1
Inability of workforce to keep up with change in the industry	2	2
Lack of experience or their being recently recruited	3	3
Staff lack motivation	4	4
Staff are still in training/ongoing training	5	5
Any other cause **SPECIFY**	95	95
DO NOT READ OUT: No particular reason	96	96
DO NOT READ OUT: Don't know	97	97

WHERE NOT ALL STAFF ARE FULLY PROFICIENT (D2 < D1 (ASK FOR UP TO 2 AND RANDOMLY SELECT 2 OCCUPATIONS IN D2 IF D2 < D1 IN >2 OCCUPATIONS)) OR WHERE RESPONDENT NOT FULLY PROFICIENT (D3/2)

D5 **[IF D2 < D1:** Thinking about **[D2 OCCUP 1]** who are not fully proficient, which skills do you feel need improving? **IF NECESSARY:** Please include only directly employed staff and not the self employed, labour only contractors or agency staff

IF D3/2: Which skills do you feel you need to develop and improve?] **PROBE FULLY AND WRITE IN**

REPEAT FOR [D2 OCCUP 2]

D2 OCCUP 1	
D2 OCCUP 2	
X	Don’ t know

BUSINESSES WITH DIRECT EMPLOYEES WHERE NOT ALL STAFF ARE FULLY PROFICIENT (A1/2+ AND D2 < D1) OR BUSINESSES WITHOUT DIRECT EMPLOYEES) WHERE RESPONDENT IS NOT FULLY PROFICIENT (A1/1 AND D3/2)

D6 [**BUSINESSES WITH DIRECT EMPLOYEES (A1/2+ AND D2<D1):**

Thinking about your establishment as a whole, does the fact that some of your staff are not fully proficient have an impact on how your establishment performs?

BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1 AND D3/2):

Does the fact that there are skills you need to develop and improve have an impact on your business?] **READ OUT AND CODE ONE ONLY**

1	Yes – major impact
2	Yes – minor impact
3	No

WHERE HAS HAD AN IMPACT (D6/1-2)

D7 [**BUSINESSES WITH DIRECT EMPLOYEES (A1/2+ AND D5/1-2):**

Is the fact that some of your staff are not fully proficient causing this establishment to…?

BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1 AND D5/1-2):

Is the fact that you are not fully proficient causing your business to…?]

READ OUT CODES 1-6 AND ROTATE AND CODE ALL THAT APPLY BEFORE ASKING ‘What other impacts is it having?’

1	Lose business or turn down bidding for work
2	Increase operating costs
3	Increase the use of overtime and the workload for staff generally
4	Outsource work
5	Miss project deadlines
6	Delay introducing new working practices/methods
7	Any other impact **SPECIFY**
8	DO NOT READ OUT: None
9	DO NOT READ OUT: Don’t know

WHERE RESPONDENT OR STAFF ARE NOT FULLY PROFICIENT (D3/2 OR D2 < D1)

D8 [**BUSINESSES WITH DIRECT EMPLOYEES (A1/2+ AND D2 < D1):**

What action, if any, is this establishment taking to overcome the fact that some of the staff are not fully proficient in their job?

BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1 AND D3/2):

What action, if any, are you taking to develop or improve your skills?]

DO NOT READ OUT. LISTEN, PROBE, CODE ALL THAT APPLY. AFTER EACH ONE ASK: What else?

1	Increase training activity/spend or increase/expand trainee programmes
2	Increase recruitment activity/spend
3	More staff appraisals/performance reviews
4	Recruiting non-UK nationals as workers
5	More supervision of staff
95	Any other action **SPECIFY**
96	DO NOT READ OUT: None
97	DO NOT READ OUT: Don't know

ASK ALL

D9 Do you currently have any migrant workers working for you, by which I mean workers who are not UK nationals and have moved to the UK from another country? Please include any staff, whether directly or indirectly employed including the self employed, labour-only contractors, or agency staff

1	Yes
2	No
3	Don't know

WHERE EMPLOY MIGRANT WORKERS (D9/1)

D10 In which occupations do you have migrant workers working for you? **READ OUT AND CODE ALL THAT APPLY**

	CONSTRUCTION SECTOR
1	Carpenters / joiners
2	Bricklayers
3	Painters / decorators
4	Plasterers
5	Roofers
6	Floorers
7	Scaffolders
8	Plant and machine operatives
9	Electricians
10	Plumbers
11	Labourers and general operatives

12	Supervisors	
13	Technical staff	
	PROFESSIONAL SERVICES	
14	Architects	
15	Architectural technologists	
16	Building service engineers	
17	Civil engineers	
18	Mechanical engineers	
19	Other engineers	
20	Town planners	
21	Technicians	
22	Building surveyors	
23	Quantity surveyors	
24	Landscape designers	
25	Project managers	
26	Scientists	
	BOTH	
27	Managers/directors	
28	HR, legal and business professionals	
29	Administrative staff	
30	Staff with no one main role or who multi task	
31	Others 1	
32	Others 2	
33	Others 3	
34	Others 4	
35	Others 5	
36	Others 6	

WHERE EMPLOY MIGRANT WORKERS (D9/1)

D11 Thinking now only about your directly employed workforce, so not including the self-employed, labour only contractors or agency staff, approximately how many of your directly employed staff overall are migrant workers? **PROMPT FOR AN APPROXIMATION AND WRITE IN BELOW (Or accept answer in %)**

	TOTAL	PROPORTION
MIGRANT WORKERS		%

Don't know X

Refused Y

WHERE PROVIDED A RESPONSE IN D11

D12 Thinking about these direct employees, how does this proportion break down between EU and non-EU migrant workers? **PROMPT FOR AN APPROXIMATION AND WRITE IN BELOW (Or accept answer in %) PUSH FOR AN ABSOLUTE PLEASE!**

	TOTAL	PROPORTION
EU		%
NON-EU		%
TOTAL (= QA1)		*%*

Don't know X

Refused Y

WHERE NO RESPONSE IN D11 (XY) OR DON'T KNOW/REFUSED IN D12

D13 Of the directly employed migrant workers you have working for you, are they from EU countries or from countries outside the EU or both? **CODE ONE ONLY**

EU countries only	1
Non-EU countries only	2
Both	3
Don't know	4

WHERE EMPLOY MIGRANT WORKERS (D9/1) AND HAVE INDIRECT WORKERS (A2/1+, INCLUDING DON'T KNOW)

D11b Thinking now only about self-employed, labour only contractors or agency staff, approximately what proportion of these overall are migrant workers? **PROMPT FOR AN APPROXIMATION AND WRITE IN BELOW (Or accept answer in %)**

	PROPORTION
MIGRANT WORKERS	%

Don't know X

Refused Y

WHERE NO RESPONSE IN D11b (XY)

D13 Of the indirectly employed migrant workers you have working for you, are they from EU countries or from countries outside the EU or both? **CODE ONE ONLY**

EU countries only	1
Non-EU countries only	2
Both	3
Don't know	4
Refused	5

WHERE HAVE HAD HARD-TO-FILL VACANCIES (C9/1) AND DOES NOT MENTION RECRUITING NON-UK NATIONALS IN C15 (CODE 7)

D14 Have you recruited, or tried to recruit, migrant workers in order to fill hard-to-fill vacancies?

ADD IF NECESSARY: BY MIGRANT WORKERS WE MEAN THOSE WHO DO NOT HOLD UK CITIZENSHIP AND HAVE RECENTLY MOVED TO THE UK FROM ANOTHER COUNTRY

1	Yes
2	No
3	Don't know

WHERE RESPONDENT OR STAFF ARE NOT FULLY PROFICIENT (D3/2 OR D2 < D1) AND DOES NOT MENTION RECRUITING NON-UK NATIONALS IN D8 (CODE 4)

D15 Have you recruited, or tried to recruit, migrant workers in order to obtain the skills you're lacking in your workforce?

ADD IF NECESSARY: BY MIGRANT WORKERS WE MEAN THOSE WHO DO NOT HOLD UK CITIZENSHIP AND HAVE RECENTLY MOVED TO THE UK FROM ANOTHER COUNTRY

1	Yes
2	No
3	Don't know

<u>SECTION E: UPSKILLING</u>

ASK ALL

E1 [**BUSINESSES WITH DIRECT EMPLOYEES (A1/2+):**

Over the next 12 months do you expect that employees will need to acquire new skills or knowledge as a result of…?

BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1):

Over the next 12 months do you expect to need to acquire new skills or knowledge as a result of…?]

READ OUT AND CODE ONE FOR EACH. ROTATE STATEMENTS

		Yes	**No**	**Don't know**
A	The development of new products and services	1	2	3
B	New Eco/Energy saving design/build methods	1	2	3
C	The introduction of new working practices	1	2	3
D	The introduction of new technologies or equipment	1	2	3
E	New legislative or regulatory requirements	1	2	3
F	Increased competitive pressure	1	2	3
G	Business management	1	2	3
H	Environment requirements	1	2	3
I	What other reasons **SPECIFY**	1	2	3

BUSINESSES WITH DIRECT EMPLOYEES WHERE THERE IS A NEED TO ACQUIRE NEW SKILLS OR KNOWLEDGE ((A1/2+ AND E1A-I/ANY CODE 1 <u>AND</u> D1/MORE THAN 1 OCCUPATION)

E2 Which single occupation will be most affected by this need to acquire new skills or knowledge? **PROMPT AS NECESSARY FROM D1 CODES (ONLY THOSE MENTIONED IN D1 FROM LIST WILL APPEAR) AND CODE ONE ONLY**

	CONSTRUCTION SECTOR	
1	Carpenters / joiners	
2	Bricklayers	
3	Painters / decorators	
4	Plasterers	
5	Roofers	
6	Floorers	
7	Scaffolders	
8	Plant and machine operatives	
9	Electricians	
10	Plumbers	
11	Labourers and general operatives	
12	Supervisors	
13	Technical staff	
	PROFESSIONAL SERVICES	
14	Architects	
15	Architectural technologists	
16	Building service engineers	
17	Civil engineers	
18	Mechanical engineers	
19	Other engineers	
20	Town planners	
21	Technicians	
22	Building surveyors	
23	Quantity surveyors	
24	Landscape designers	
25	Project managers	
26	Scientists	
	BOTH	
27	Managers/directors	
28	HR, legal and business professionals	
29	Administrative staff	
30	Staff with no one main role or who multi task	
31	Others 1	
32	Others 2	
33	Others 3	
34	Others 4	
35	Others 5	
36	Others 6	

WHERE THERE IS A NEED TO ACQUIRE NEW SKILLS OR KNOWLEDGE (E1A-I/ANY CODE 1) ASK FOR E2 RESPONSE OR D1 RESPONSE IF ONLY ONE OCCUPATION CODED IN D1

E3 [**BUSINESSES WITH DIRECT EMPLOYEES (A1/2+ AND E1A-I/ANY CODE 1):** Which skills do you feel will need improving or updating amongst your **[E2/D1 RESPONSE]** over the next 12 months?

PROBE: Which other skills will need updating among **[E2/D1 RESPONSE]**?

BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1 AND E1A-I/ANY CODE 1): Which skills do you feel you will need to improve or update over the next 12 months?

PROBE: Which other skills will you need to update?]

PROMPT AS NECESSARY AND CODE ALL THAT APPLY

1	Health and safety (inc. asbestos) and first aid
2	Technical/trade specific
3	Legislation/regulations
4	Management/business skills
5	New or different products/markets/branch out
6	IT/new software
7	Green/ecological products and/or practices
8	Sales/marketing
9	General/all sorts
10	Other **SPECIFY**
11	Don't know

SECTION F: WORKFORCE TRAINING AND DEVELOPMENT

READ OUT: I am now going to ask you some questions about training and development for staff whether employees or self-employed. For the moment please exclude anyone on formal, government funded Apprenticeships.

ASK ALL

F1 Over the past 12 months have you funded or arranged any off-the-job training or development for yourself or staff i.e. training away from the individual's immediate work position, whether on your premises or elsewhere?

1	Yes
2	No
3	Don't know

F2 Have you funded or arranged any on-the-job or informal training over the last 12 months (whether for yourself, direct staff, the self-employed or others)? By on-the-job training I mean activities that would be recognised as training by staff and not the sort of learning by experience which could take place all the time.

1	Yes
2	No
3	Don’t know

F1/1 OR F2/1 = PROVIDED TRAINING

WHERE PROVIDED TRAINING (F1/1 OR F2/1)

F3 Over the last 12 months how many staff employed at this establishment have you funded or arranged training and development for, including any who have since left. Please include any self-employed or labour-only subcontractors as well as direct employees. **PROMPT FOR AN ESTIMATE, WRITE IN AND CODE TO BANDINGS**

AA Just yourself (i.e. respondent) XX Don’t know YY Refused

WHERE XX/YY: Which of the following bandings does the number of staff at this establishment that you have funded or arranged training and development for in the last 12 months fall into?

0	Just yourself (i.e. respondent)
1	1 - 2
2	3 – 4
3	5 - 9
4	10 - 19
5	20 - 29
6	30 - 39
7	40 - 49
8	50 - 99
9	100 - 199
10	200+
XX	Don’t know (DNRO)
YY	Refused

WHERE F3/1+ AND WHERE PROVIDED OFF-THE-JOB TRAINING (F1/1)

F4 **[IF F1/1 AND F2/1:** Thinking ONLY about off-the-job training, over the last 12 months which occupations have you funded or arranged off-the-job training for?**]**

[IF F1/1 AND F2/2: You said you had arranged off-the-job training for **[F3 RESPONSE]** staff. Over the last 12 months, which occupations have you funded or arranged off-the-job training for?**]**

ADD IF NECESSARY: Please include all staff whether employed directly or self employed, labour-only contractors, or agency staff but please do not include anyone on a formal, government funded Apprenticeship.

WHERE F3/1+ AND WHERE PROVIDED OFF-THE-JOB TRAINING (F1/1)

F5 And for roughly how many of the **[F4 RESPONSE]** have you funded or arranged off-the-job training in the last 12 months, including any who have since left?

F4		**F5**
	CONSTRUCTION SECTOR	
1	Carpenters / joiners	
2	Bricklayers	
3	Painters / decorators	
4	Plasterers	
5	Roofers	
6	Floorers	
7	Scaffolders	
8	Plant and machine operatives	
9	Electricians	
10	Plumbers	
11	Labourers and general operatives	
12	Supervisors	
13	Technical staff	
	PROFESSIONAL SERVICES	
14	Architects	
15	Architectural technologists	
16	Building service engineers	
17	Civil engineers	
18	Mechanical engineers	
19	Other engineers	
20	Town planners	
21	Technicians	
22	Building surveyors	
23	Quantity surveyors	
24	Landscape designers	
25	Project managers	
26	Scientists	
	BOTH	
27	Managers/directors	
28	HR, legal and business professionals	

F4			F5
29	Administrative staff		
30	Staff with no one main role or who multi task		
31	Others 1		
32	Others 2		
33	Others 3		
34	Others 4		
35	Others 5		
36	Others 6		
		TOTAL	

WHERE PROVIDED OFF-THE-JOB TRAINING (F1/1)

F6 And, over the last 12 months, on average, how many days off-the job training and development have you arranged FOR EACH PERSON RECEIVING off-the-job training?

NOTE TO INTERVIEWER: If respondent says 'a week' or 'two weeks' etc check: 'So how many WORKING days is that?'

ADD IF NECESSARY: Please include all staff whether employed directly or self employed, labour-only contractors, or agency staff but please do not include anyone on a formal, government funded Apprenticeship. **WRITE IN AND THEN CODE ONE ONLY. USE BANDS TO PROMPT FOR AN APPROXIMATION IF NECESSARY**

XX UNSURE YY REFUSED

WHERE XX/YY: Approximately how many days would that have been….? **READ OUT BANDS AND CODE ONE ONLY**

0	Less than a day
1	1 day
2	2 days
3	3 – 4 days
4	5 – 6 days
5	7 – 8 days
6	9 – 10 days
7	11 - 12 days
8	13 - 14 days
9	15 – 16 days
10	17 – 18 days
11	19 – 20 days
12	More than 20 days
XX	Don't know

WHERE F3/1+ AND WHERE PROVIDED ON-THE-JOB TRAINING (F2/1)

F7 **[IF F1/1 AND F2/1]:** Thinking now ONLY about on-the-job training, over the last 12 months which occupations have you funded or arranged on-the-job training for?

[IF F1/2 AND F2/1]: You said you had arranged on-the-job training for **[F3 RESPONSE]** staff. Over the last 12 months which occupations have you funded or arranged on-the-job training for?

ADD IF NECESSARY: Please include all staff whether employed directly or self employed, labour-only contractors, or agency staff but please do not include anyone on a formal, government funded Apprenticeship.

F3/1+ AND WHERE PROVIDED ON-THE-JOB TRAINING (F2/1)

F8 And for roughly how many of the **[F7 RESPONSE]** have you funded or arranged on-the-job training in the last 12 months, including any who have since left?

F7		F8
	CONSTRUCTION SECTOR	
1	Carpenters / joiners	
2	Bricklayers	
3	Painters / decorators	
4	Plasterers	
5	Roofers	
6	Floorers	
7	Scaffolders	
8	Plant and machine operatives	
9	Electricians	
10	Plumbers	
11	Labourers and general operatives	
12	Supervisors	
13	Technical staff	
	PROFESSIONAL SERVICES	
14	Architects	
15	Architectural technologists	
16	Building service engineers	
17	Civil engineers	
18	Mechanical engineers	
19	Other engineers	
20	Town planners	
21	Technicians	
22	Building surveyors	
23	Quantity surveyors	
24	Landscape designers	
25	Project managers	
26	Scientists	
	BOTH	
27	Managers/directors	
28	HR, legal and business professionals	

29	Administrative staff		
30	Staff with no one main role or who multi task		
31	Others 1		
32	Others 2		
33	Others 3		
34	Others 4		
35	Others 5		
36	Others 6		
		TOTAL	

WHERE PROVIDED ON-THE-JOB TRAINING (F2/1)

F9 And, over the last 12 months, on average, how many days on-the job training and development have you arranged FOR EACH PERSON RECEIVING on-the-job training?

NOTE TO INTERVIEWER: If respondent says 'a week' or 'two weeks' etc check: 'So how many WORKING days is that?'

ADD IF NECESSARY: Please include all staff whether employed directly or self employed, labour-only contractors, or agency staff but please do not include anyone on a formal, government funded Apprenticeship. **WRITE IN AND THEN CODE ONE ONLY. USE BANDS TO PROMPT FOR AN APPROXIMATION IF NECESSARY**

XX UNSURE YY REFUSED

WHERE XX/YY: Approximately how many days would that have been….? **READ OUT BANDS AND CODE ONE ONLY**

0	Less than a day
1	1 day
2	2 days
3	3 – 4 days
4	5 – 6 days
5	7 – 8 days
6	9 – 10 days
7	11 - 12 days
8	13 - 14 days
9	15 – 16 days
10	17 – 18 days
11	19 – 20 days
12	More than 20 days
XX	Don't know

WHERE PROVIDED TRAINING (F1/1 OR F2/1)

F10 **[IF F3/1+:** Thinking now about qualifications, how many people over the last 12 months that you have funded or arranged training for [whether on- or off-the-job,] including labour-only sub-contractors as well as direct employees are or were being trained towards a nationally recognised qualification; such as an NVQ/SVQ? **IF F3/0:** Has your training been towards a nationally recognized qualification?**] PROMPT FOR AN ESTIMATE, WRITE IN AND CODE TO BANDINGS. IF JUST RESPONDENT INPUT 1**

XX Don't know YY Refused

WHERE XX/YY: Which of the following bandings does the number of people at this establishment that have received training towards a nationally recognised qualification for in the last 12 months fall into? **READ OUT AND CODE ONE ONLY**

0	none
1	1 - 2
2	3 – 4
3	5 - 9
4	10 - 19
5	20 - 29
6	30 - 39
7	40 - 49
8	50 - 99
9	100 - 199
10	200+
11	All staff trained
12	Don't know (DNRO)

WHERE ANY TRAINED TOWARDS NATIONALLY RECOGNISED QUALIFICATION (F10/1+)

F11 **[WHERE F3/1+ and F10 = 1:** Was this person being…. **WHERE F3/1+ and F10/>1:** How many people working for you over the past 12 months are or were**]** trained towards an NVQ or SVQ, that is a National Vocational Qualification or Scottish Vocational Qualification? **IF NECESSARY:** Please include labour-only sub-contractors as well as direct employees? **[WHERE F3/0 AND F10 = 1:** Were you training towards an NVQ or SVQ, that is a National Vocational Qualification or Scottish Vocational Qualification? **] PROMPT FOR AN ESTIMATE, WRITE IN AND CODE TO BANDINGS. IF JUST RESPONDENT INPUT 1**

XX Don't know YY Refused

WHERE XX/YY: Which of the following bandings does the number of people at this establishment that have received training towards an NVQ or SVQ in the last 12 months fall into? **READ OUT AND CODE ONE ONLY**

0	none
1	1 - 2
2	3 – 4
3	5 - 9
4	10 - 19
5	20 - 29
6	30 - 39
7	40 - 49
8	50 - 99
9	100 - 199
10	200+
11	All staff trained towards qualifications
12	Don’t know (DNRO)

WHERE ANY TRAINED TOWARDS AN NVQ/SVQ (F11/1+)

F12 **[IF F3/1+ AND F11/1+:** And what is the main NVQ/SVQ level you have trained staff towards? **IF F3/0 AND F11/1+:** What is the main NVQ/SVQ you have trained towards?**] PROMPT AS NECESSARY. ALLOW MULTIPLE CODE IF CANNOT CHOOSE JUST ONE**

1	Level 1 qualifications [SC: (in Scotland they may be known as Level 4 qualifications)] such as an [EN/WL/NI: NVQ SC: SVQ] Level 1 or BTEC Introductory Diploma[SC: or General Standard]
2	Level 2 qualifications [SC: (in Scotland they may be known as Level 5 qualifications)] such as an [EN/WL/NI: NVQ SC: SVQ] Level 2, GCSEs [SC:, Credit Standard Grade] or BTEC First Diploma
3	Level 3 qualifications [SC: (in Scotland they may be known as Level 6 qualifications)] such as an [EN/WL/NI: NVQ SC: SVQ] Level 3, A-Levels or BTEC Nationals [WL: , or the Advanced Level Welsh Baccalaureate SC: , or Highers or Advanced Highers]
4	Level 4 qualifications or above [SC: (in Scotland they may be known as Level 7 qualifications)] such as degrees, HNC/HNDs, postgraduate degrees or high level specialist professional qualifications
5	Don’t know

WHERE TRAINED OTHER STAFF AND ANY TRAINED TOWARDS LEVEL 1 NVQ/SVQ (F3/1+ AND F12/1)

F13 What are the main reasons you train staff to NVQ/SVQ level 1? PROBE: what benefits has training to level 1 brought? **PROBE FULLY AND WRITE IN**

WHERE ANY TRAINED TOWARDS NATIONALLY RECOGNISED QUALIFICATION (F10/1+)

F14 **[IF F3/1+ AND F10/1+:** How many people working for you over the past 12 months, if any, are or were being trained towards an HNC or HND? Please include labour-only sub-contractors as well as direct employees **IF F3/0 AND F10/1:** Have you been training towards an HNC or HND in the last 12 months?**] PROMPT FOR AN ESTIMATE, WRITE IN AND CODE TO BANDINGS. IF JUST RESPONDENT INPUT 1**

XX Don't know YY Refused

WHERE XX/YY: Which of the following bandings does the number of people at this establishment that have received training towards an HNC or HND in the last 12 months fall into? **READ OUT AND CODE ONE ONLY**

0	none
1	1 - 2
2	3 – 4
3	5 - 9
4	10 - 19
5	20 - 29
6	30 - 39
7	40 - 49
8	50 - 99
9	100 - 199
10	200+
11	All staff trained towards a qualification
12	Don't know (DNRO)

PROFESSIONAL SECTOR, WHERE ANY TRAINED TOWARDS NATIONALLY RECOGNISED QUALIFICATION (F10/1+ AND SIC 71/74)

F15 **[IF F3/1+ AND F10/1+:** How many people working for you over the past 12 months, if any, are or were being trained towards a degree? Please include labour-only sub-contractors as well as direct employees **IF F3/0 AND F10/1:** Have you been training towards a degree in the last 12 months? **] PROMPT FOR AN ESTIMATE, WRITE IN AND CODE TO BANDINGS. IF JUST RESPONDENT INPUT 1**

XX Don't know YY Refused

WHERE XX/YY: Which of the following bandings does the number of people at this establishment that have received training towards a degree in the last 12 months fall into? **READ OUT AND CODE ONE ONLY**

0	none
1	1 - 2
2	3 – 4
3	5 - 9
4	10 - 19
5	20 - 29
6	30 - 39
7	40 - 49
8	50 - 99
9	100 - 199
10	200+
11	All staff trained towards a qualification
12	Don't know (DNRO)

WHERE PROVIDED TRAINING FOR ANY STAFF (F1/1 OR F2/1 AND F3/1+)

F16 And does this establishment/business formally assess whether the training and development received by an employee has an impact on his or her performance?

1	Yes
2	No
3	Don't know

WHERE PROVIDED TRAINING (F1/1 OR F2/1)

F17 Still excluding any apprentices, but thinking about all training in the last 12 months, which of the following types of training provision have you or your staff used in the last year? **READ OUT AND CODE ONE FOR EACH**

ADD IF NECESSARY: Please include all staff whether employed directly or self employed, labour-only contractors*, or agency staff but please do not include anyone on a formal, government funded Apprenticeship*.

		Yes	No	Don't know
A	Training delivered by an FE college	1	2	3
B	Training delivered by Higher Education (e.g. university)	1	2	3
C	Training delivered by [ALL EXCEPT NORTHERN IRELAND: the National Construction College (NCC)] [NORTHERN IRELAND: CITB-NI]	1	2	3
D	Training provided by any other private training provider	1	2	3
E	Training provided by a manufacturer or supplier	1	2	3
F	Other off-the-job training such as courses or formal instruction	1	2	3
G	Learning or training where a more experienced worker demonstrates techniques and passes on skills to less experienced staff while working alongside them on-the-job	1	2	3
H	Any self-learning where staff study using books, manuals, CD-ROMs or other materials	1	2	3
I	Training provided by a Professional Institution for example for Continuing Personal Development	1	2	3
J	Training delivered by/through an industry federation/ body e.g. FMB?	1	2	3

WHERE NOT PROVIDED TRAINING (F1/2 AND F2/2)

F18 [**BUSINESSES WITH EMPLOYEES/SELF EMPLOYED/CONTRACTORS/AGENCY STAFF (A1/2+ OR (A1/1 AND A2/1+) AND F1/2 AND F2/2):** You mentioned that you have not provided training for yourself or any staff at this location over the past 12 months. **BUSINESSES WITHOUT EMPLOYEES/SELF EMPLOYED/CONTRACTORS/AGENCY STAFF (A1/1 AND A2/0) AND F1/2 AND F2/2):** You mentioned that you have not taken up any training over the past 12 months.] What are the reasons for this?

DO NOT READ OUT. LISTEN. CODE ALL MENTIONED. AFTER EACH RESPONSE ASK: What other reasons have there been?

1	The courses interested in are not available locally
2	The quality of the courses or providers locally is not satisfactory
3	I don't know what provision is available locally
4	The start dates or times of the courses are inconvenient
5	External courses are too expensive
6	Managers have lacked the time to organise training
7	Employees are too busy to give training
8	Employees are too busy to go on training courses
9	All our staff are fully proficient
95	Other reasons **SPECIFY**
96	No particular reason
97	Don't know

WHERE PROVIDED TRAINING (F1/1 OR F2/1)

F19 **[BUSINESSES WITH EMPLOYEES/SELF EMPLOYED/CONTRACTORS/AGENCY STAFF (A1/2+ OR (A1/1 AND A2/1+) AND F1/1 OR F2/1):** If you could have done, would you have provided MORE training for staff than you were able to over the last 12 months? **BUSINESSES WITHOUT EMPLOYEES/SELF EMPLOYED/CONTRACTORS/AGENCY STAFF (A1/1 AND A2/0) AND F1/1 OR F2/1)** If you could have done, would you taken up MORE training than you were able to over the last 12 months?**]**

1	Yes
2	No
3	Don't know

WHERE WOULD HAVE PROVIDED MORE TRAINING (F19/1)

F20 [**BUSINESSES WITH EMPLOYEES/SELF EMPLOYED/CONTRACTORS/AGENCY STAFF (A1/2+ OR (A1/1 AND A2/1+) AND F19/1):** What barriers, if any, have there been preventing your establishment providing more training over the last 12 months for staff at this location? **BUSINESSES WITHOUT EMPLOYEES/SELF EMPLOYED/CONTRACTORS/AGENCY STAFF (A1/1 AND A2/0) AND F19/1):** What has prevented you from taking up more training in the last 12 months?]

DO NOT READ OUT. CODE ALL MENTIONED. PROBE FULLY. AFTER EACH RESPONSE ASK: what other barriers have you faced?

ADD IF NECESSARY: Please include all staff whether employed directly or self employed, labour-only contractors, or agency staff but please do not include anyone on a formal, government funded Apprenticeship

1	Lack of funds for training/training expensive
2	Can't spare more staff time (having them away on training)
3	Staff now fully proficient/don't need it
4	Staff not keen
5	A lack of good local training providers
6	A lack of provision (e.g. courses are full up)
7	Difficulty finding training providers who can deliver training where or when we want it
8	A lack of appropriate training/qualifications in the subject areas we need
9	Hard to find the time to organise training
10	Lack of knowledge about training opportunities and/or suitable courses
95	Other barriers **SPECIFY**
96	No particular reason
97	Don't know

SECTION G: APPRENTICESHIPS AND ADVANCED APPRENTICESHIPS

CONSTRUCTION SECTOR ONLY (SIC 41-43 OR A4/1-7)

G3 Do you currently have any staff undertaking Apprenticeships at this site?

1	Yes
2	No
3	Don't know

WHERE DO NOT CURRENTLY HAVE APPRENTICES (G3/2)

G4 Do you currently offer [SCOTLAND: Modern] Apprenticeships at this site?

1	Yes
2	No
3	Don't know

WHERE CURRENTLY HAVE APPRENTICES (G3/1)

G5 How many staff do you currently have at this establishment, if any, who are undertaking an Apprenticeship? **WRITE IN**

XX DON'T KNOW YY REFUSED

WHERE CURRENTLY HAVE OR OFFER APPRENTICES (G3/1 OR G4/1)

G6 NEW What led to your organisation starting to offer Apprenticeships? **DO NOT READ OUT. PROBE FULLY AND CODE ALL THAT APPLY**

1	Approached by a training provider
2	Business needs
3	Saw publicity/advertising promoting Apprenticeships
4	An employee enquired about it
5	CITB approached us
6	Company contacted by interested individual/applicant to be an Apprentice
95	Other (SPECIFY)
97	DO NOT READ OUT: Don't know

WHERE CURRENTLY HAVE OR OFFER APPRENTICES (G3/1 OR G4/1)

G7 NEW What are the main business benefits you hope to achieve by offering Apprenticeships? **DO NOT READ OUT. PROBE FULLY AND CODE ALL THAT APPLY**

1	Improve productivity
2	Improve or maintain skill levels
3	To replace staff that are retiring / succession planning
4	Easier to attract / recruit young people if offer them
5	Allows us to train people the way we want / mould them to how we do things
6	To enhance our reputation / for our corporate image
7	Save money (cheaper to train apprentices than take on experienced workers)
8	Corporate social responsibility / put something back into the community
9	To create a more diverse workforce
95	Other (SPECIFY)
97	Don't know

CONSTRUCTION SECTOR ONLY (SIC 41-43 OR A4/1-7)

G8 Thinking about the next 12 months, how likely is it that **[BUSINESSES WITH DIRECT EMPLOYEES (A1/2+):** this establishment **BUSINESSES WITHOUT DIRECT EMPLOYEES (A1/1)** you**]** will have someone starting an Apprenticeship? **PROMPT AS NECESSARY AND CODE ONE ONLY**

1	Very likely
2	Quite likely
3	Not very likely
4	Not at all likely
5	Don't know

WHERE DO NOT CURRENTLY HAVE APPRENTICES (G3/2 AND G4/1 OR G4/2)

G9 NEW What are the main reasons why you do not [G4/1: currently have] [G4/2: offer] Apprenticeships? **DO NOT READ OUT. PROBE FULLY AND CODE ALL THAT APPLY**

1	All our staff fully skilled
2	Too small/no need for more staff / any recruitment
3	Prefer to recruit experienced staff
4	Too much management / supervisory time
5	Too much paperwork and bureaucracy
6	Apprentices tend to leave soon after their training
7	We prefer other forms of training
8	Bad previous experience of Apprenticeship training
9	Too expensive
10	Lack of local training providers, travel to college (provider) too far
11	Uncertainty over workload
95	Other (SPECIFY)
97	Don't know / no particular reason

CONSTRUCTION SECTOR ONLY (SIC 41-43 OR A4/1-7)

G10 NEW Would any of the following encourage you to take on [more] Apprenticeships? **READ OUT AND CODE ONE FOR EACH**

		Yes	**No**	**Don't know**
A	Help with identifying potential candidates	1	2	3
B	Initial screening of suitable candidates	1	2	3
C	If it was a requirement of contracts with public sector clients	1	2	3
D	If main contractors required it as part of their supply chain	1	2	3
E	Grants to support Apprenticeship training	1	2	3
F	Help in finding a suitable training provider	1	2	3
G	Using a managing agency to take away the paperwork and bureaucracy	1	2	3
H	Shared Apprenticeship Schemes which help employers to share the cost and commitment to taking on an apprentice, with the possibility of taking one on for as short a duration as 3 months.	1	2	3
I	More co-operation with the supply chain	1	2	3
J	Help with organising the process	1	2	3

SECTION H: THE ECONOMY

BUSINESSES WITH DIRECT EMPLOYEES (A1/2+)

H1 Finally, we are interested to know what trends you have experienced in training spend and training delivered at this establishment in the last 12 months? Please tell me if each of the following has increased, stayed the same or decreased **READ OUT AND CODE ONE FOR EACH**

		Increased	Stayed the same	Decreased	Don’t know
A	**WHERE TRAIN (F1/1 OR F2/1):** Expenditure on training per employee	1	2	3	4
B	**WHERE TRAIN (F1/1 OR F2/1):** Proportion of employees provided with training	1	2	3	4
C	**WHERE TRAIN (F1/1 OR F2/1):** Proportion of total training delivered by external providers	1	2	3	4
D	**WHERE TRAIN (F1/1 OR F2/1):** Emphasis placed on informal learning	1	2	3	4
E	**WHERE TRAIN (F1/1 OR F2/1):** Amount of training that leads to recognised qualifications	1	2	3	4
F	**WHERE OFFER APPRENTICESHIPS (G3/1 OR G4/1):** Number of Apprentices and new trainees recruited by your establishment	1	2	3	4
G	**ASK ALL:** Number of staff employed at your establishment in total	1	2	3	4

SECTION I: FOLLOW UP

ASK ALL

I1 If CITB wish to undertake further work on related issues in the future, would it be ok for them or their appointed contractors to contact you on these issues?

1 Yes

2 No

This survey has been commissioned by the [IF ENGLAND, WALES AND SCOTLAND: CITB] [IF NORTHERN IRELAND: CITB-NI]. On behalf of them and BMG, thank you very much for your time. If you have any questions about the research you can call Emma Parry on 0121 333 6006.

Study prepared by BMG Research from a commission by CITB.

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