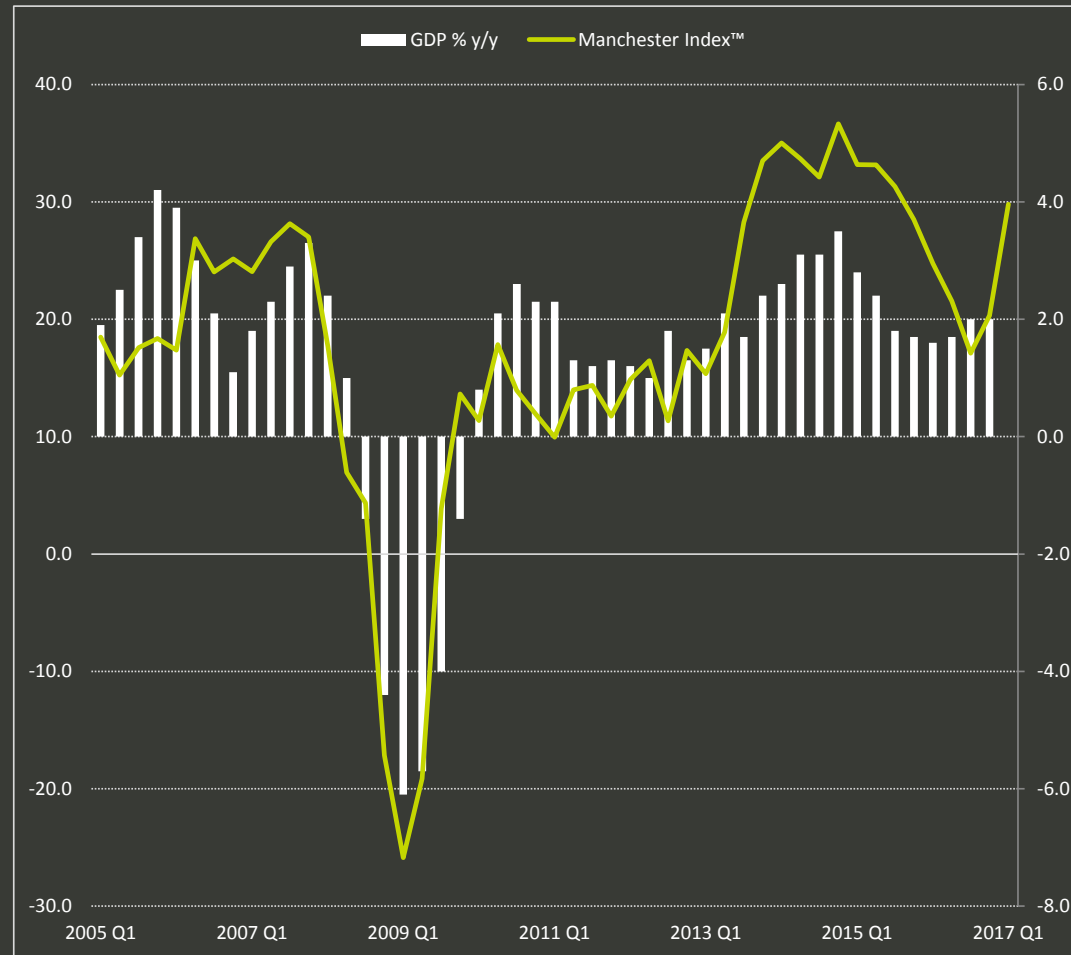


GMCC & CITB GM Construction Pipeline 2017

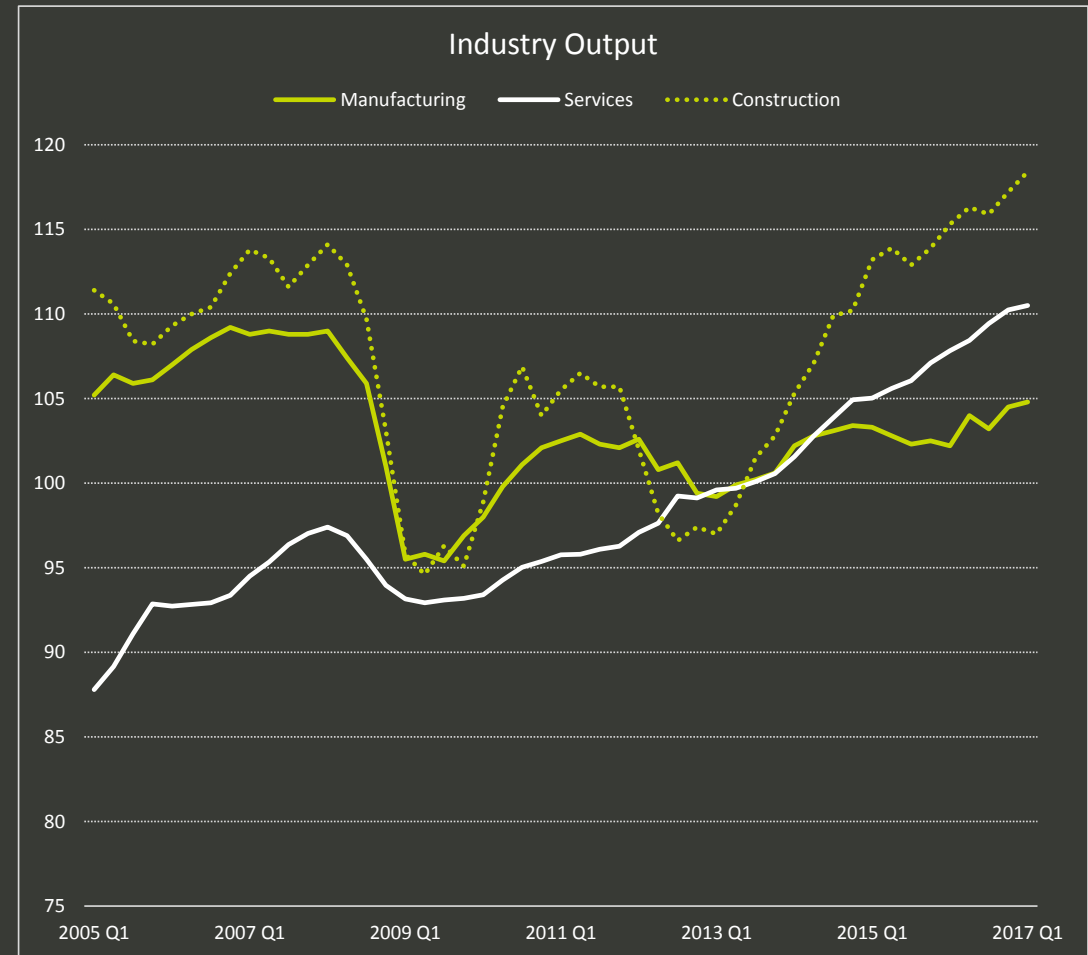


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Economic Environment Summary & The Manchester Index™



Source: ONS Second Estimate of GDP; GMCC QES Q1 2017

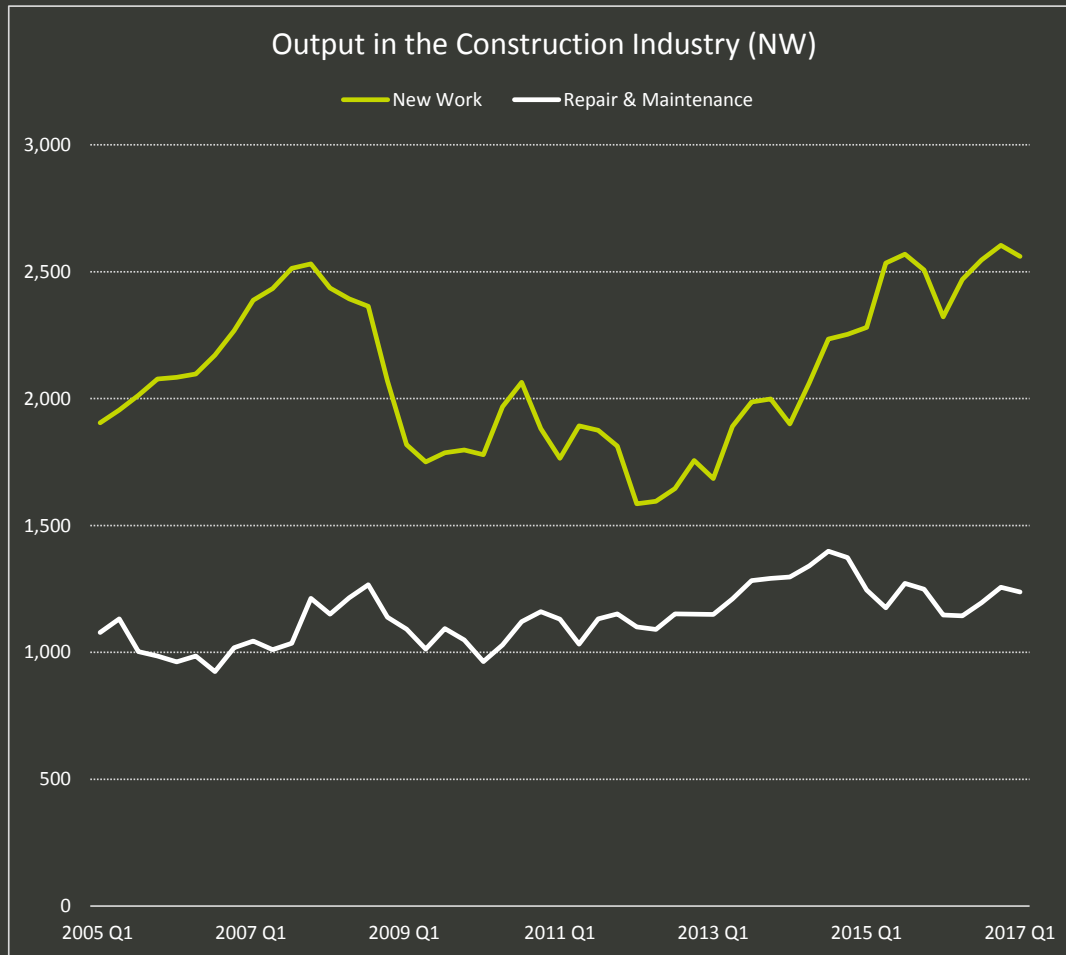


Source: ONS Index of Production; Index of Services; Output in the Construction Industry

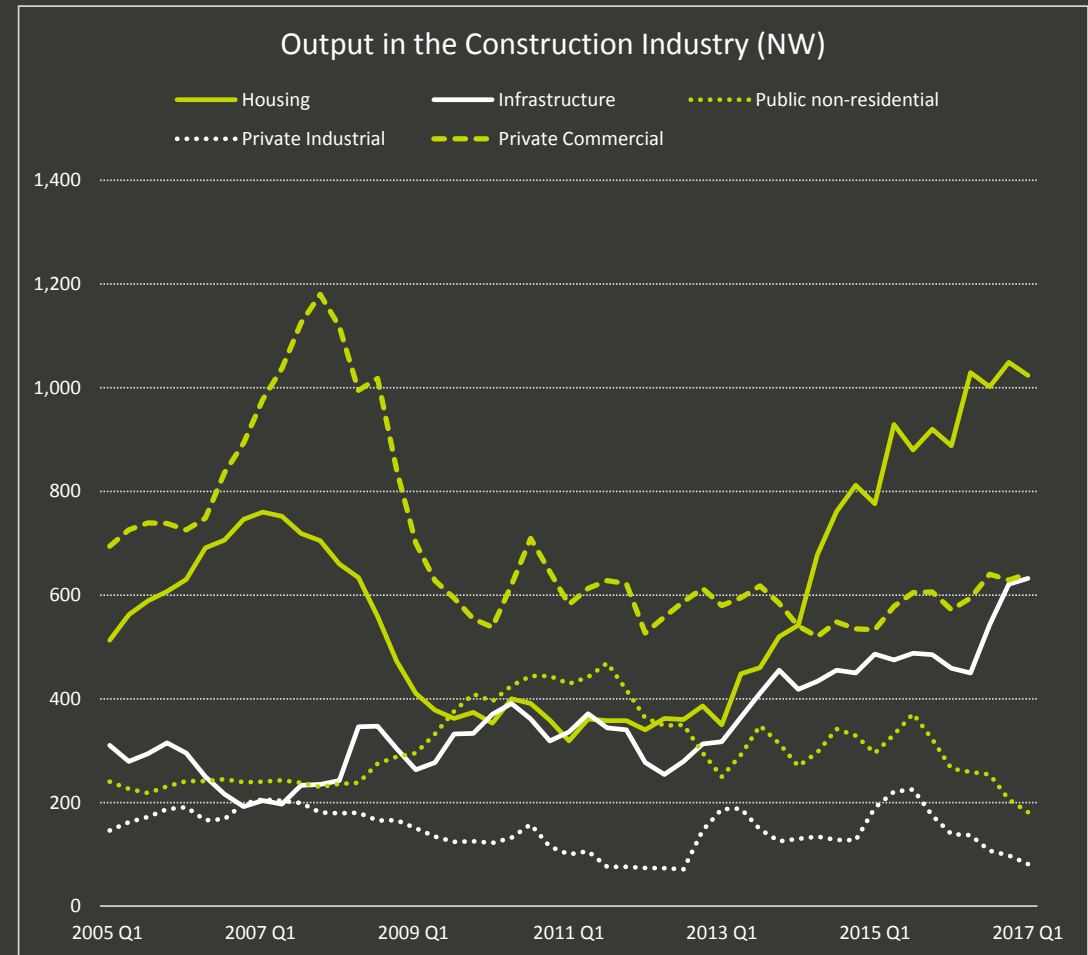


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ONS Output Data **Construction Sector**



Source: ONS Output in the Construction Industry

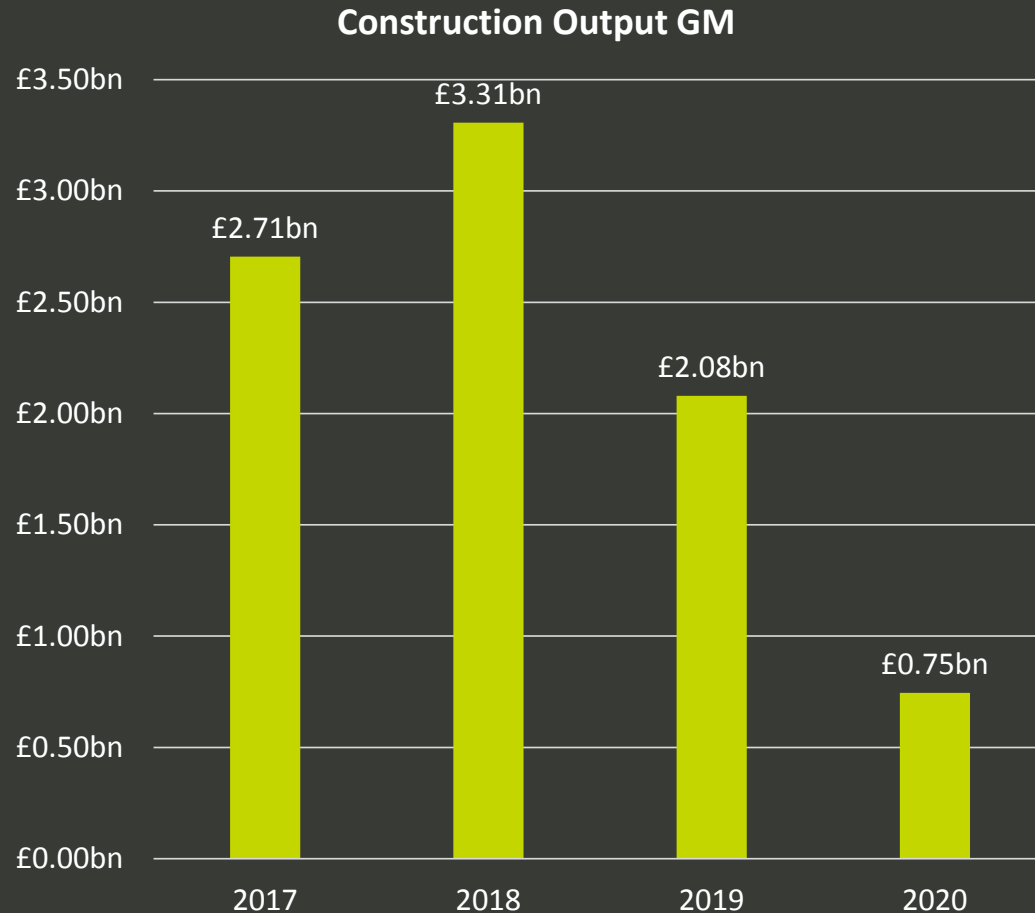


Source: ONS Output in the Construction Industry



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Pipeline Summary



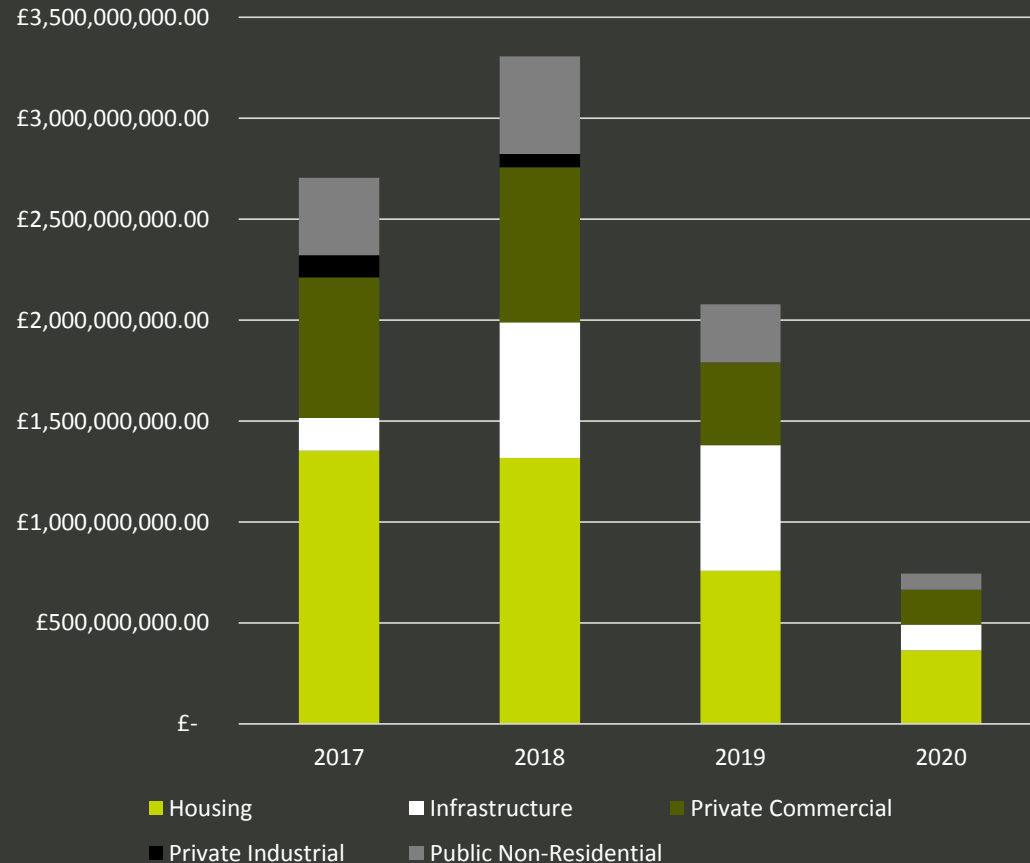
Source: GM & CITB GM Construction Pipeline 2017

- Total pipeline output of **£12.5bn** across **769** projects extending to **2033**
- In **2017 – 2020**
 - **567** project starts
 - **£8.8bn** of output in GM



Output by Sector

Construction Annual Output 2017-2020 By Sectors (£billions)



- Total output 2017-2020: **£8.8bn**
- 42% (**£3.79bn**) of forecasted output is in housing
 - Private Commercial: 23% (£2bn)
 - Infrastructure: 18% (£1.6bn)
 - Public Non-Resi: 14% (£1.2bn)
 - Private Industrial: 3% (£176m)

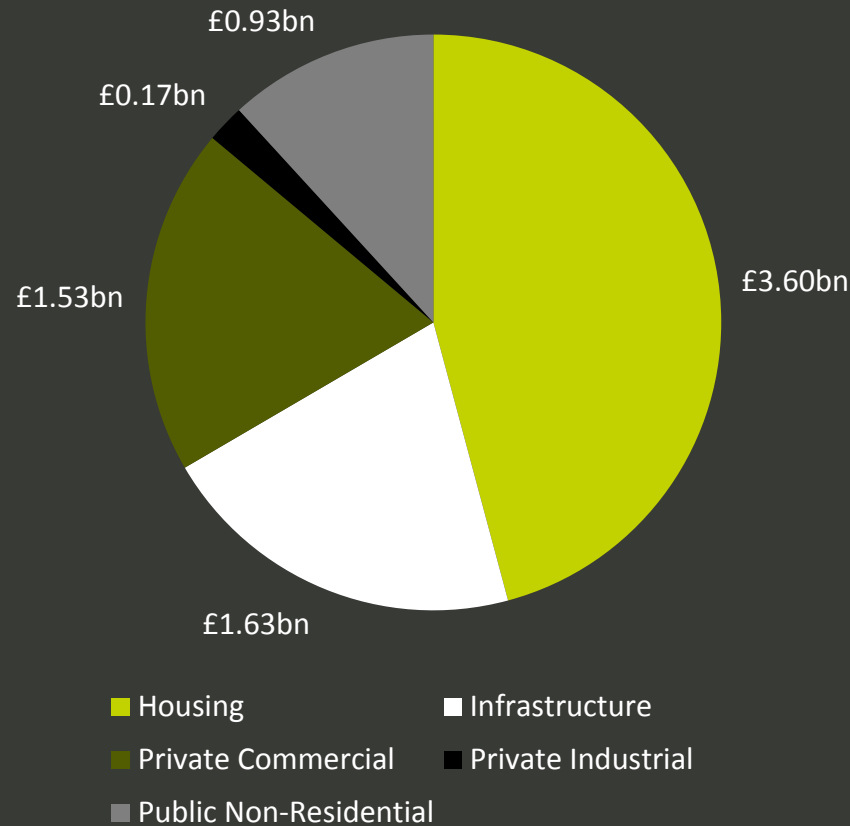
Source: GM & CITB GM Construction Pipeline 2017



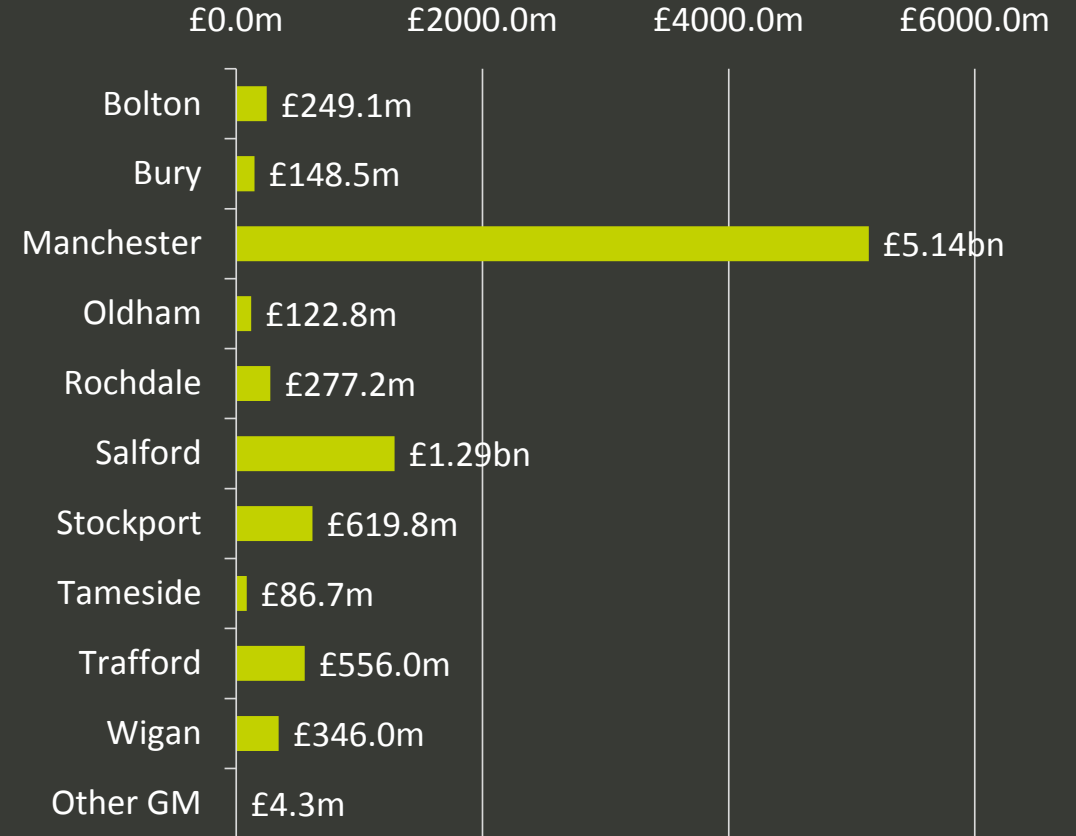
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Project Starts by Sector, Borough

Value of Project Starts 2017-20



Total Output 2017 - 2020



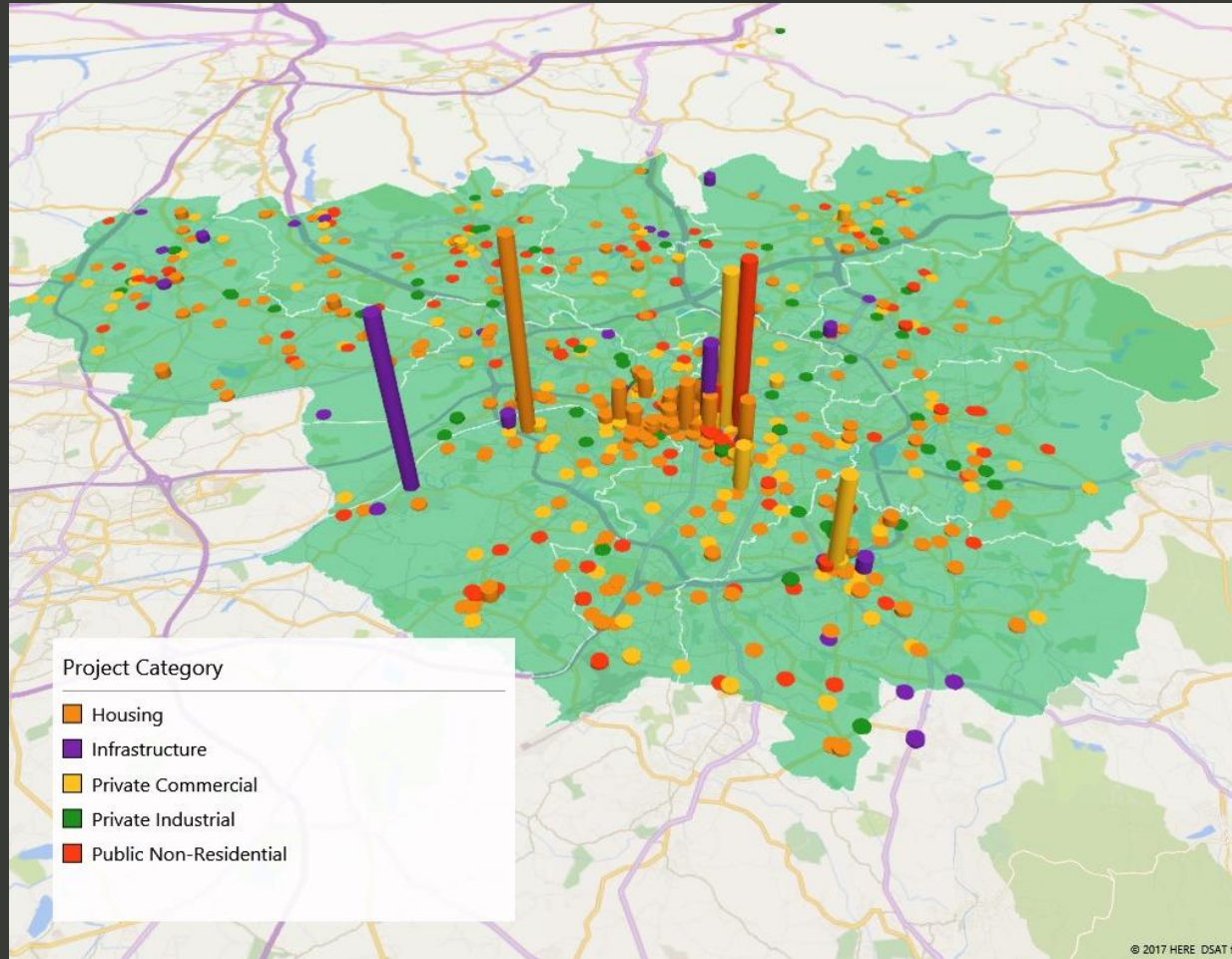
Source: GM & CITB GM Construction Pipeline 2017

Source: GM & CITB GM Construction Pipeline 2017



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All Projects in Pipeline

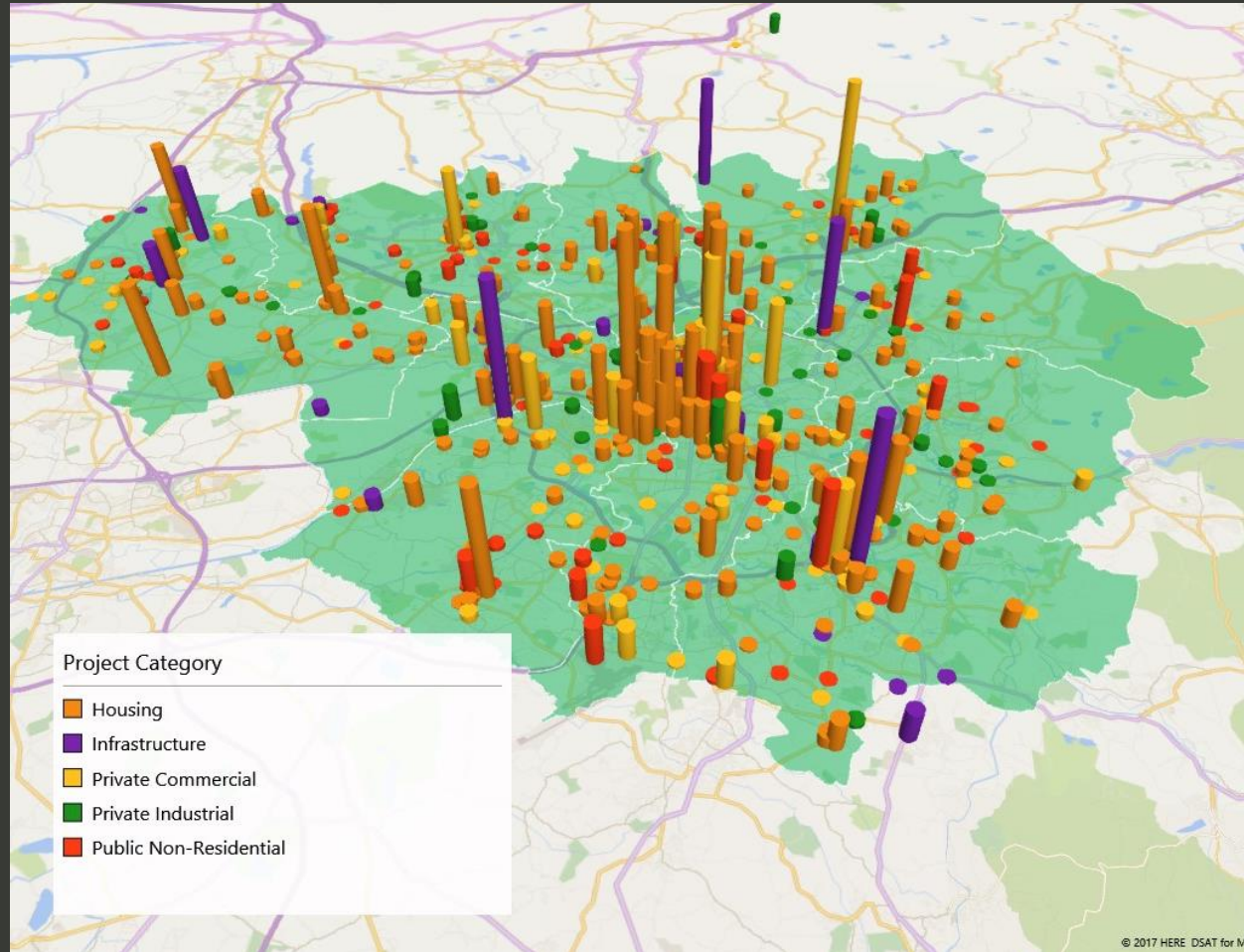


Source: GM & CITB GM Construction Pipeline 2017



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Sub-£100m Projects in Pipeline

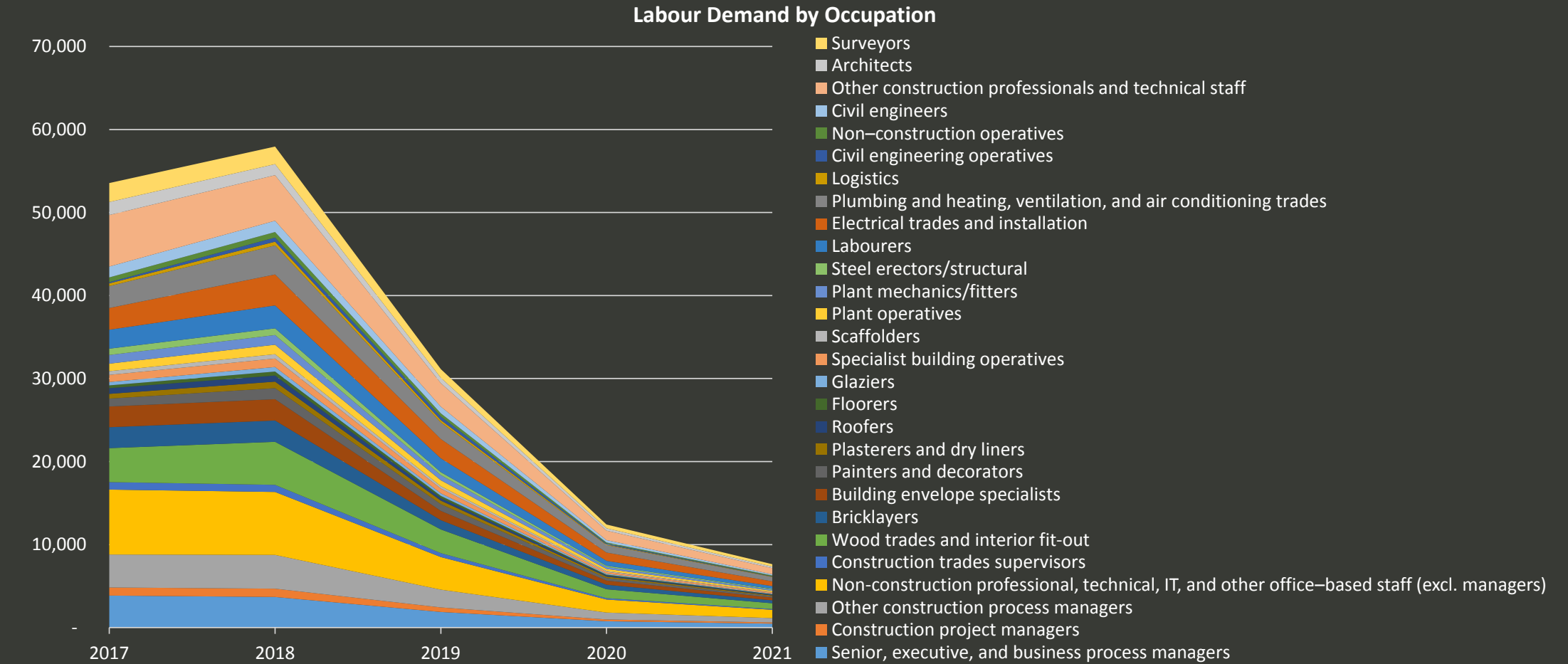


Source: GM & CITB GM Construction Pipeline 2017



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Labour Demand by Occupation



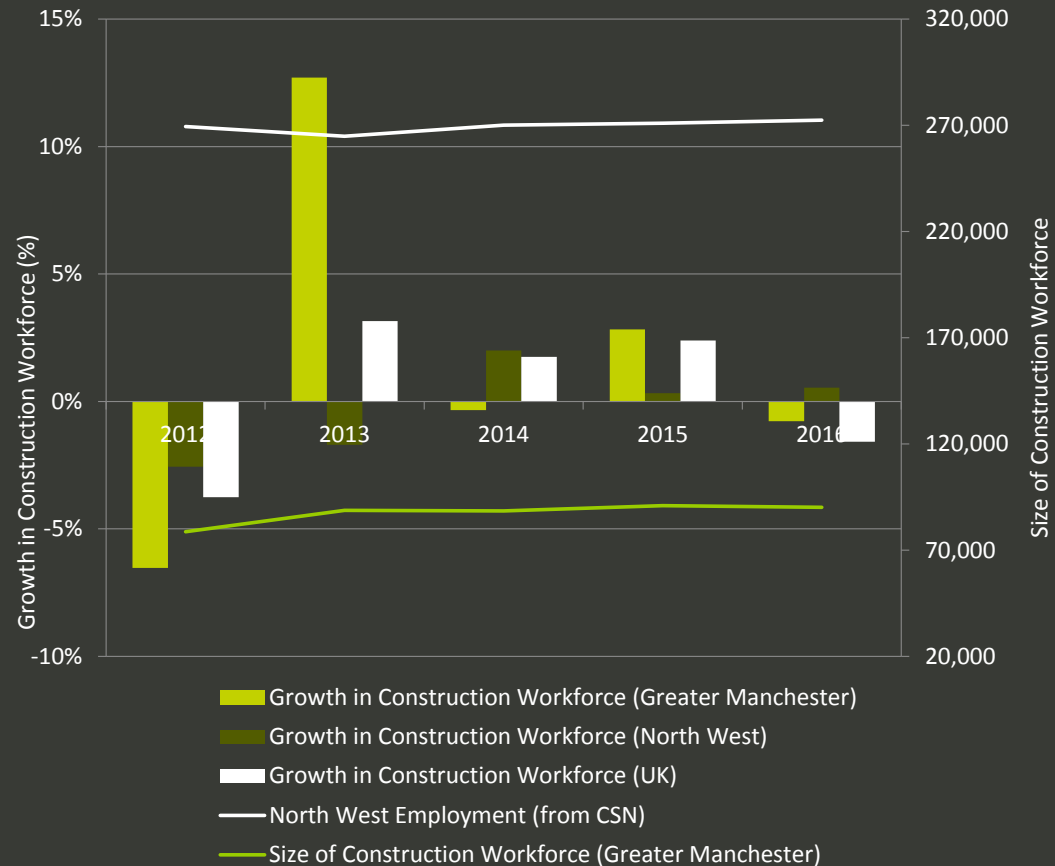
Source: GM & CITB GM Construction Pipeline 2017



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Construction Employment

Year on Year Change in Construction Employment: 2012 - 2016



- GM construction workforce fell by 0.7% in 2016
 - Long-term trend is upwards having risen by 7% over the last five years.

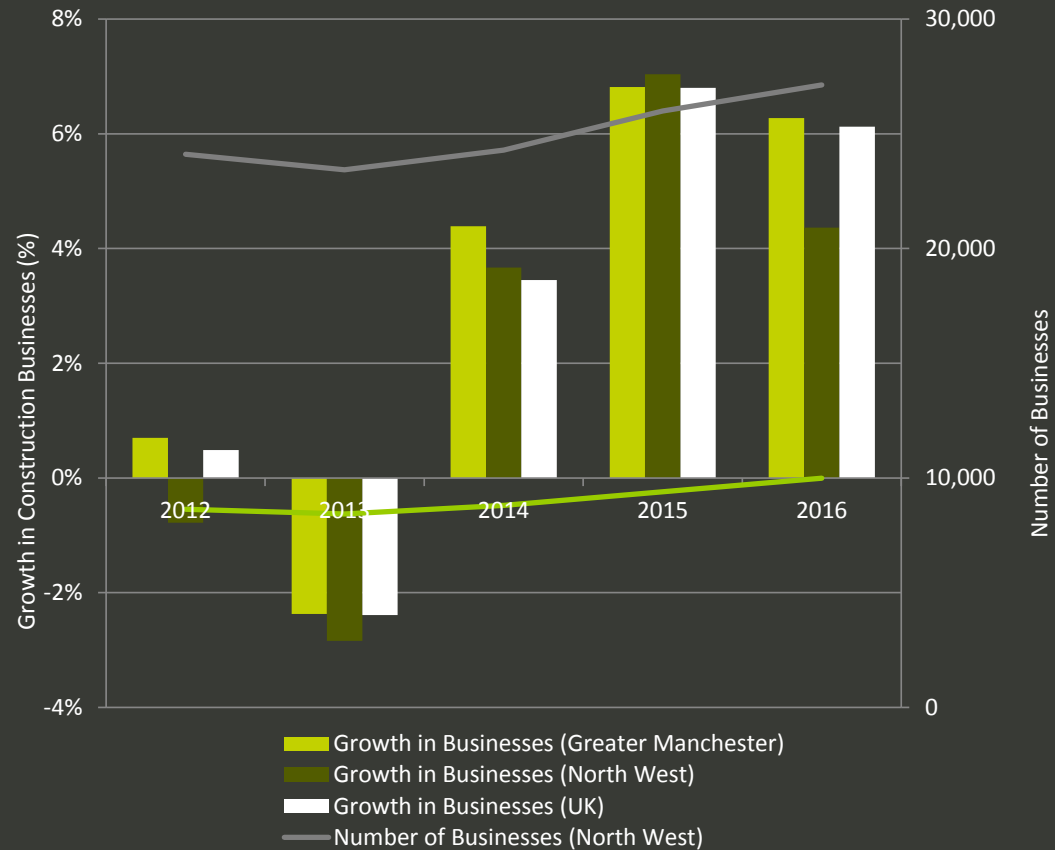
Source: ONS/NOMIS (2017) Annual Population Survey workplace analysis by industry January – December 2016, CITB Construction Skills Network



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Construction Businesses

Year on Year Change in Construction Businesses: 2012 - 2016



- 17% increase in the number of Micro sized construction businesses from 2011 to 2016 within GM
 - This accounts for almost all (97%) of the growth in construction businesses over this period
- Self-employment within construction in Greater Manchester is 20% above 2011 levels at 34,000 workers, higher than 2015 levels but down 4% on 2014 levels.

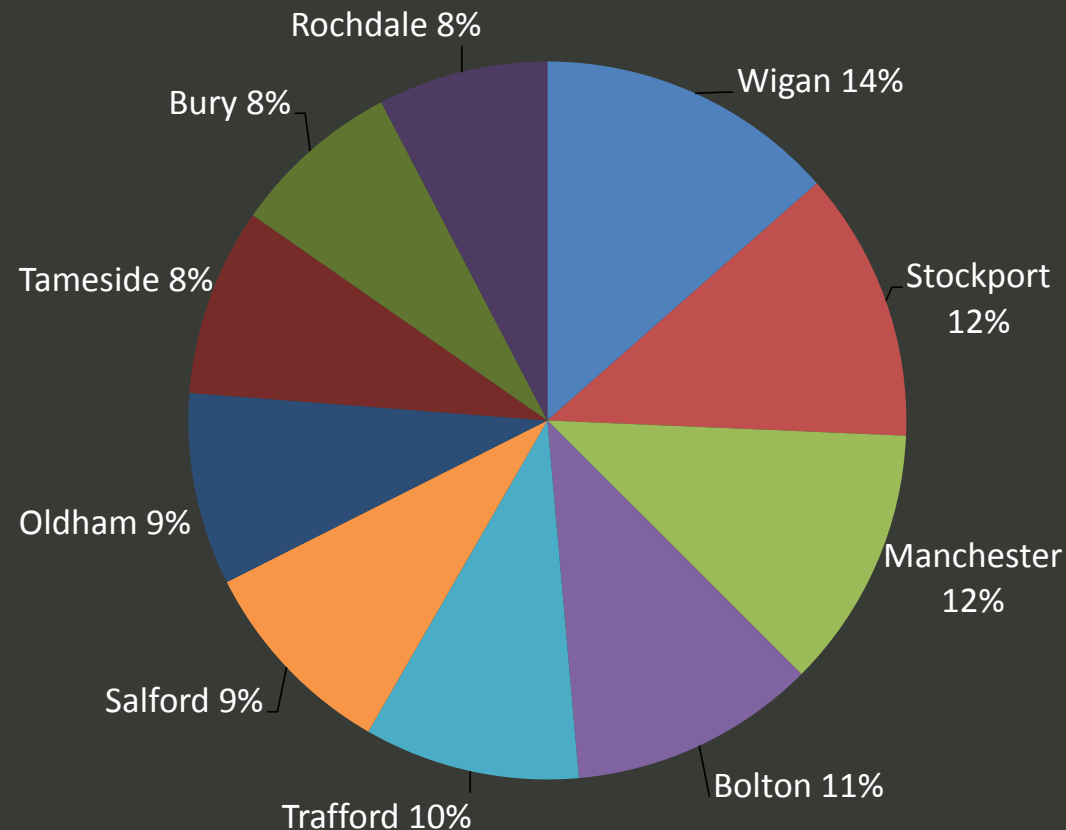
Source: ONS/NOMIS (2017) Annual Population Survey workplace analysis by industry January – December 2016, CITB Construction Skills Network



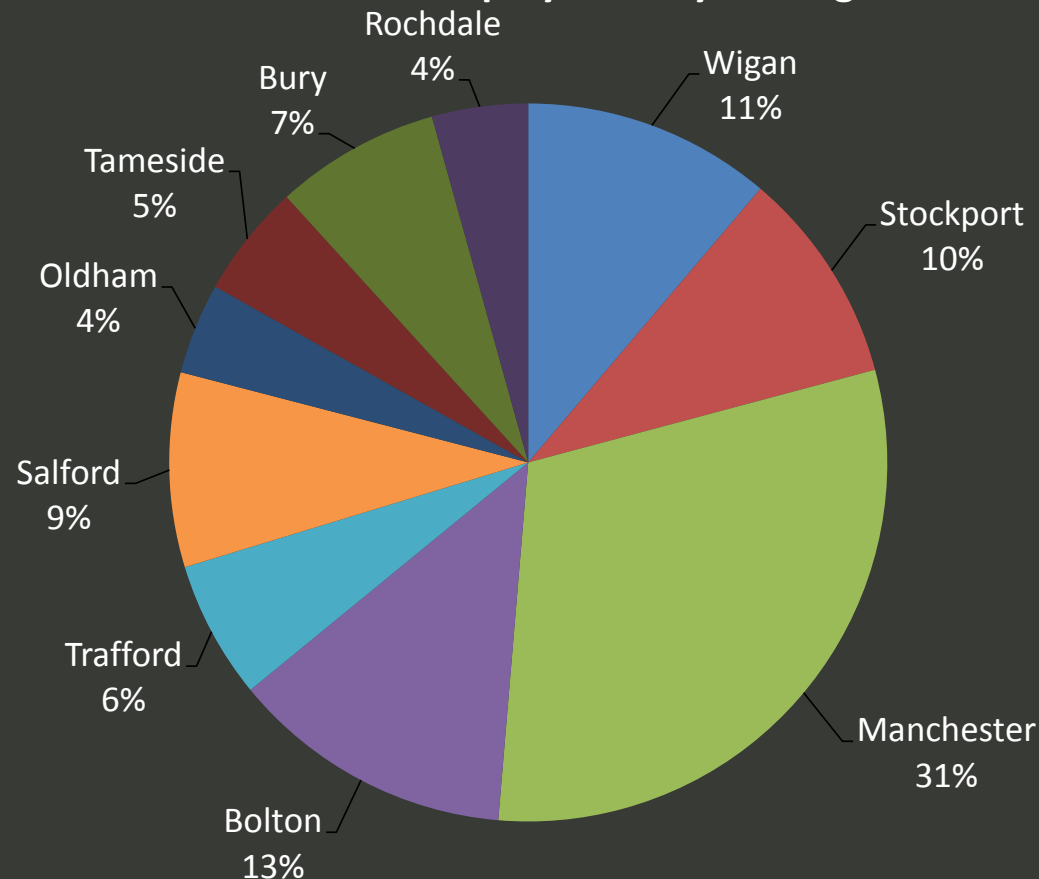
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Greater Manchester Construction Industry

Construction Businesses by Borough



Construction Employment by Borough

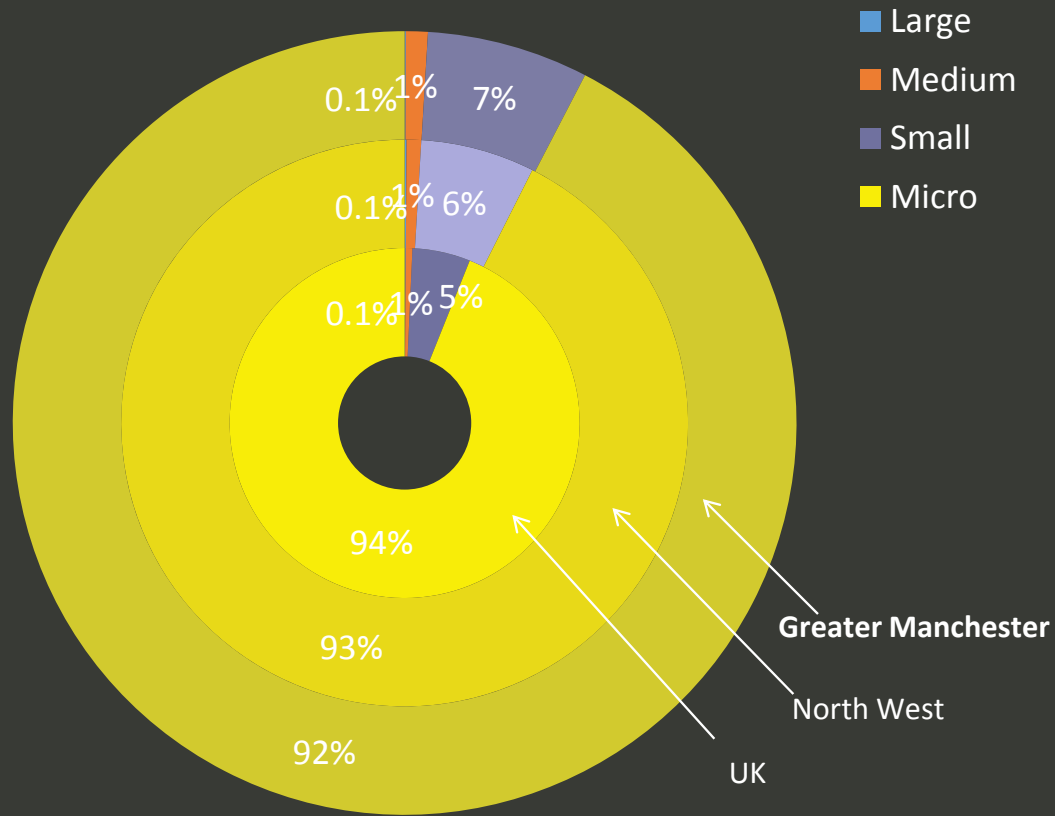


Source: ONS/NOMIS UK Business Count 2016



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Construction Businesses & Employment



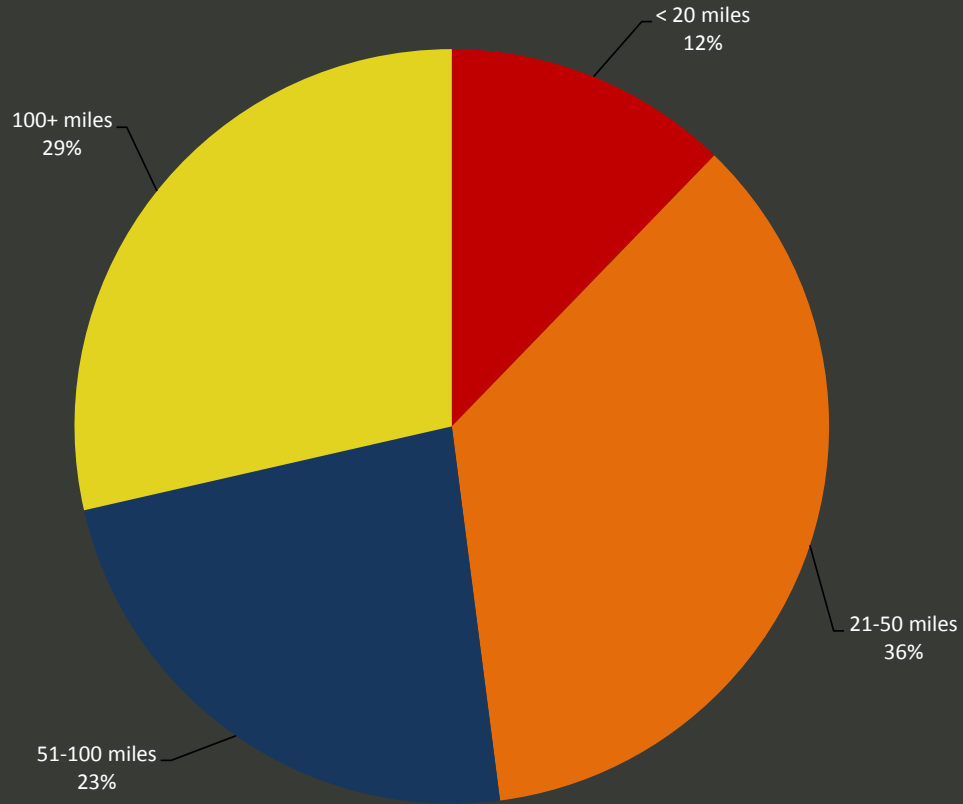
Size of Construction Businesses (UK Business Count, NOMIS 2016)

Occupation	Greater Manchester	North West
Senior, executive, and business process managers	6,760	16,790
Construction Project Managers	1,800	4,480
Other construction process managers	8,570	21,290
Construction Trades Supervisors	1,780	4,420
Civil engineers	1,790	4,450
Other construction professionals and technical staff	8,420	20,930
Surveyors	2,380	5,900
Architects	1,490	3,690
Wood trades and interior fit-out	10,540	26,180
Bricklayers	2,920	7,260
Building envelope specialists	3,440	8,550
Painters and decorators	4,500	11,190
Plasterers	2,130	5,290
Roofers	2,380	5,910
Floorers	1,300	3,230
Glaziers	1,180	2,940
Specialist building operatives nec*	2,350	5,830
Scaffolders	1,260	3,140
Plant operatives	1,910	4,740
Plant mechanics/fitters	2,070	5,140
Steel erectors/structural fabrication	1,040	2,590
Labourers nec*	5,850	14,540
Electrical trades and installation	8,510	21,150
Plumbing and HVAC Trades	7,610	18,900
Logistics	1,000	2,480
Civil engineering operatives nec*	520	1,300
Non-construction professional, technical, IT, and other office-based staff	14,470	35,960
Non-construction operatives	1,700	4,220
Total	109,670	272,490

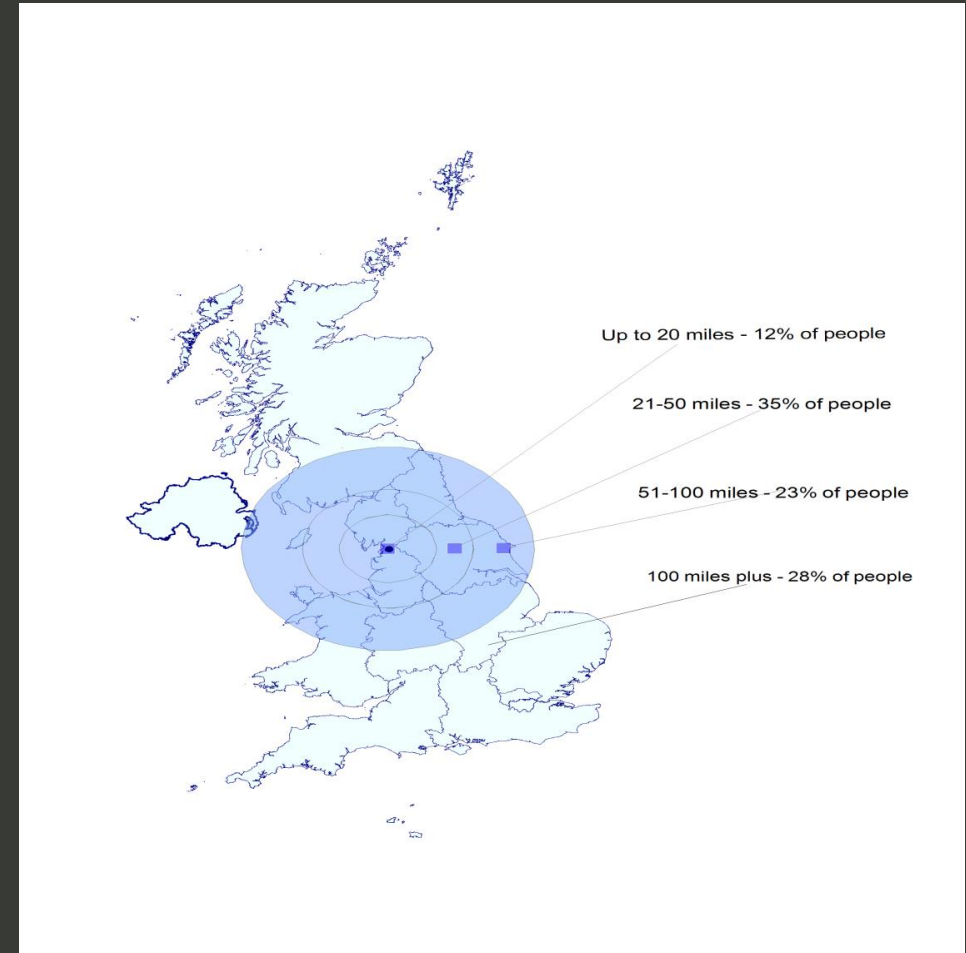
Construction occupational breakdown, 2016 (source Experian & CITB)



Mobility



Furthest distance worked in past 12 months (CITB, 2015)



Furthest distance worked in past 12 months (CITB, 2015)



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Construction FE providers

Provider	2013-14	2014-15	2015-16	Total	Local authority	2013-14	2014-15	2015-16	% Change
The Manchester College	1270	1320	1,130	3,720	Bolton	1,107	1,075	804	-27.4%
Economic Solutions Ltd	550	1130	1,180	2,860	Bury	600	658	548	-8.7%
Bolton College	840	630	470	1,940	Manchester	1,350	1,628	1,593	18.0%
Salford City College	650	600	460	1,710	Oldham	857	600	648	-24.4%
Wigan and Leigh College	520	520	620	1,660	Rochdale	797	798	935	17.3%
Tameside College	480	450	580	1,510	Salford	1,055	1,433	1,254	18.9%
Stockport College	550	450	450	1,450	Stockport	917	803	788	-14.1%
Hopwood Hall College	490	400	550	1,440	Tameside	817	714	842	3.1%
Trafford College	390	400	340	1,130	Trafford	1,079	1,091	1,073	-0.6%
Bury College	350	370	370	1,090	Wigan	1,100	1,324	1,403	27.5%
The Oldham College	470	300	320	1,090	Grand Total	9,679	10,124	9,888	2.2%

Top Construction FE providers by Unique Learner Starts within Greater Manchester (Source: CITB/SFA)

Unique Learner starts by area, construction subjects, FE & Apprentices (Source: CITB/SFA)



Gap Analysis

Occupation	Greater Manchester Employment	2018 demand as a % of 2016 employment
Senior, executive, and business process managers	6,760	108%
Construction Project Managers	1,800	100%
Other construction process managers	8,570	88%
Construction Trades Supervisors	1,780	95%
Civil engineers	1,790	98%
Other construction professionals and technical staff	8,420	93%
Surveyors	2,380	125%
Architects	1,490	133%
Wood trades and interior fit-out	10,540	110%
Bricklayers	2,920	140%
Building envelope specialists	3,440	148%
Painters and decorators	4,500	118%
Plasterers	2,130	109%
Roofers	2,380	88%
Floorers	1,300	98%
Glaziers	1,180	123%
Specialist building operatives nec*	2,350	104%
Scaffolders	1,260	79%
Plant operatives	1,910	79%
Plant mechanics/fitters	2,070	77%
Steel erectors/structural fabrication	1,040	101%
Labourers nec*	5,850	95%
Electrical trades and installation	8,510	95%
Plumbing and HVAC Trades	7,610	102%
Logistics	1,000	81%
Civil engineering operatives nec*	520	107%
Non-construction professional, technical, IT, and other office-based staff	14,470	102%
Non-construction operatives	1,700	77%
Total	109,670	103%

Occupational breakdown of demand for Greater Manchester compared to current employment (Source CITB/WLC)

Occupation	Greater Manchester Employment	Greater Manchester ARR	ARR as a % of 2016 employment
Senior, executive, and business process managers	6,760	20	0.3%
Construction Project Managers	1,800	-	-
Other construction process managers	8,570	80	0.9%
Construction Trades Supervisors	1,780	48	2.7%
Civil engineers	1,790	<20	-
Other construction professionals and technical staff	8,420	28	0.3%
Surveyors	2,380	-	-
Architects	1,490	44	3.0%
Wood trades and interior fit-out	10,540	276	2.6%
Bricklayers	2,920	152	5.2%
Building envelope specialists	3,440	44	1.3%
Painters and decorators	4,500	72	1.6%
Plasterers	2,130	104	4.9%
Roofers	2,380	36	1.5%
Floorers	1,300	<20	-
Glaziers	1,180	32	2.7%
Specialist building operatives nec*	2,350	-	-
Scaffolders	1,260	-	-
Plant operatives	1,910	76	4.0%
Plant mechanics/fitters	2,070	44	2.1%
Steel erectors/structural fabrication	1,040	24	2.3%
Labourers nec*	5,850	164	2.8%
Electrical trades and installation	8,510	260	3.1%
Plumbing and HVAC Trades	7,610	224	2.9%
Logistics	1,000	56	5.6%
Civil engineering operatives nec*	520	28	5.4%
Non-construction prof., tech., IT, and other office-based staff	14,470	220	1.5%
Total	107,970	2,060	1.80%

Occupational breakdown of ARR for Greater Manchester (Source CITB)

