

Workforce Mobility and Skills in the UK Construction Sector 2022

London Report - May 2023



Study prepared by BMG Research from a commission by CITB.

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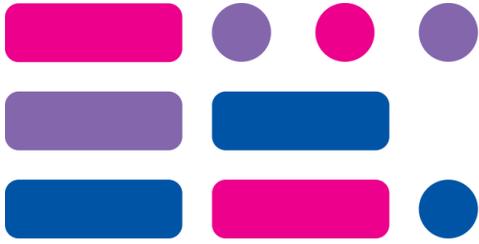
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Executive summary

CITB commissioned BMG Research to undertake the 2022 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2018/19, 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 3,005 construction workers undertaking manual roles on sites across the UK and 443 interviews were conducted with construction workers in London.

Profile of the sample

All but 6% of construction workers in London are male. Half (50%) are aged under 35, which is a higher proportion than the general UK 16-64 years' workforce as a whole (36%), and higher than the UK average¹ in the survey (45%). Just 4% of construction workers are aged 60 or over.

While at 19%, the proportion of construction workers in London of ethnic minority origin has increased since 2018/19, and is the highest of any nation/region, as has been the case in previous iterations of the survey, this is a significantly lower proportion than is represented among the London working age population (41%).

As was the case in 2018/19, the majority of construction workers in London (59%, compared to 51% in 2018/19) originated from outside the UK, with similar proportions coming from EU (30%) and non-EU (29%) countries. One in five (19%) are Romanian.

Around two in five (39%) construction workers in London hold a passport for another country, as compared to 13% across the UK as a whole. Half (49%) hold a UK passport, and one in twenty (4%) do not have a passport.

Two in five (39%) of London's construction workers have lived in the UK all their lives, down on the 50% who had done so in 2018/19, and much lower than the UK average of 80%. The same proportion (39%) have lived in the UK for more than five years, while 16% have been in the UK for less than five years.

Labourers/general operatives account for the highest proportion of construction workers in London, (17%, compared to 12% in 2018/19 and 17% in 2015), in line with the UK average (18%). Site managers, carpenters/joiners and electricians each account for around one in ten construction workers (11%, 10% and 10% respectively). Again, these are largely in line with the UK average. Other occupations account for less than one in ten of those interviewed in London.

¹ Unless otherwise stated, the term 'UK average' used throughout this report is the average for the UK construction workforce as estimated by this survey.

More than a third (37%) of construction workers in London say they perform a supervisory or management role on their site, fewer than in 2018/19 (45%), and significantly higher than the UK average of 28%.

Half (51%) of construction workers in London are self-employed, a significantly higher proportion than was the case in 2018/19 (43%) and 2015 (39%), and significantly higher than the UK average of 42%. There has been a corresponding increase in the proportion who report being directly employed, from 47% to 38%, and this remains below the national average of 48%. Around one in ten (8%) report working for an employment agency, in line with 2018/19 (10%) and the UK average (9%).

Three in ten (30%) construction workers in London are employed on a temporary, rather than a permanent (59%), in line with 2018/19 (35% and 58% respectively), and with the UK average (29% and 67% respectively). The remainder believe they have an 'other' type of contract arrangement (11%).

While construction workers in London, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (51%, compared with a UK average of 59%), a significantly higher proportion of workers in London than the UK average report working for 50 or more hours per week (33%, compared to a UK average of 19%). However, this is directionally lower than the 39% of workers who reported doing so in 2018/19.

Work history

Around one in five (19%) of all construction workers in London have worked in the construction industry for over twenty years, slightly fewer than in 2018/19 (22%), and significantly lower than the UK average in 2022 (30%), as was the case in 2018/19. A third (35%) have been in the industry for less than five years, again in line with 2018/19 (33%), and significantly higher than the UK average of 29%.

The proportion of construction workers in London who have worked pretty much continuously in the industry has remained stable over time (54%, compared to 56% in 2018/and 53% in 2015), and is lower than the UK average (61%). Consequently, the proportion who have only ever worked in construction is also lower than the UK average (66% compared to 71%).

Amongst the 21% of construction workers in London who worked in another sector before starting work in construction, the most common sectors in which construction workers had started their careers were wholesale and retail trade (20%), accommodation and food services (11%), transportation and storage (9%), administrative and support services (8%) and manufacturing (7%).

In terms of the job roles that respondents have held in other sectors, the highest proportions were in elementary administration and service occupations (22%, increasing from 2% since 2018/19) and skilled trade occupations (19%, declining from 31% in 2018/19).

Overall, more than two fifths (44%) of construction workers in London have worked in more than one construction trade or occupation whilst working in the construction industry, in line with 2018/19 (44%), and higher than the UK average (35%).

Amongst the 44% of all construction workers in London that had worked in at least one other role/occupation, 22% had worked in 1 previous role, 47% had worked in 2 previous roles, 22% had worked in 3 roles/occupations and 9% had worked in 4 roles/occupations. This is much in line with the UK average.

Workers are most likely to have previously worked as a labourer/general operative (40%), while 16% had previously worked as a carpenter/joiner and 12% as a bricklayer. This is very much in line with the UK average.

Seven in ten (71%) construction workers in London would like to carry on in the same trade or occupation, in line with 2018/19 (73%), but lower than the UK average of 80%. One in eight (12%) would like to change their trade/occupation, again in line with 2018/19 (15%), but higher than the UK average (7%), and the highest of all regions/nations. The remainder would like to leave construction (7%) or are unsure (9%).

Qualifications and skills

Skills cards/certificates

While over nine in ten (92%) of all construction workers in London report holding a skill card or certificate (e.g., CSCS or CSR), this is a reduction on the 98% who did so in 2018/19 and 2015. This reflects the UK picture, which has seen a similar decline (from 97% to 93%). Correspondingly, the proportion who have no cards has risen from 2% in 2018/19, to 6% in the latest survey.

In terms of the type of skill card or certificate held by construction workers in London, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (82%), but to a lesser extent than 2018/19 (87%) and 2015 (89%). Close to one in ten (8%) hold the CPCS (Construction Plant Competence Scheme), in line with 2018/19 (8%), and 3% hold the CISRS (Construction Industry Scaffolders Record Scheme), again in line with 2018/19 (3%).

Construction-specific qualifications

Overall, more than two in five (43%) construction workers in London report having no construction-related qualifications when they started their first job. This is significantly lower than the 70% who reported this in 2018/19, and the 83% who did so in 2015, but in line with the UK average, which has also declined significantly from 72% to 47%.

Overall, 70% of construction workers in London report holding a construction-related qualification, slightly fewer than the 74% who did so in 2018/19, and in line with the 2022 UK average of 69%.

As in previous years, the qualifications most likely to be held by construction workers in London are NVQ/SVQ qualifications (51%, as in 2018/19). One in six (18%) construction workers with qualifications hold City & Guilds qualifications, again returning this to levels seen previously following a dip in 2018/19 (8%), one in nine (11%) hold an apprenticeship, an uplift on the 5% who did in 2018/19, and a lower proportion (8%) hold a degree. Fewer than one in twenty construction workers with qualifications hold an HNC/HND/BTEC Higher, and a similar proportion hold a Construction Award (both 3%).

Current study for qualifications

Overall, a quarter (23%) of construction workers in London are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications), significantly higher than the UK average of 13%, and higher than any other region/nation. It also continues the increases seen since 2012, where 12% were working towards formal qualifications.

Supervisory/managerial training

Amongst those who do not currently perform supervisory/management roles and have not had this role before, a third (33%) want to become a supervisor or manager in the future, significantly higher than the UK average of 17%, but somewhat down on the 41% who did so in 2018/19. A further one in eight (12%) have held such a role before and wish to do so again in the future.

Over two in five (42%) construction workers in London have received formal training designed to improve managerial or supervisory knowledge or skills, fewer than the 46% who had in 2018/19, and higher than the UK average of 33%. Among those who have or have had some form of supervisory or management responsibilities, four in five (82%) have received formal training, in line with 2018/19 (85%), and with the UK average (80%).

In terms of the types of supervisory/managerial training undertaken, SMSTS is most frequently mentioned by those who have undertaken any training (42%), followed by Site Safety Supervisors Courses (26%) and in-house training (19%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

Basic skill needs

There has been a significant increase in the proportion of construction workers who identify a need for any training, from 19% in 2018/19, to 44% in the latest survey.

While there have been increases across the board, they are most pronounced in relation to speaking English, from 14% in 2018/19 to 29% in the latest survey.

Overall skill levels

As in previous years, the vast majority (95%) of construction workers in London have a construction-related qualification and/or skills card/certificate (or were working towards a

qualification at the point of interview). While this is in line with the UK average (96%), it is lower than the 99% who did so in 2018/19.

As has been noted above, the proportion of construction workers in London who are working towards additional qualifications has continued to increase over time, from 12% in 2012, to 23% in the latest survey, and is significantly higher than the UK average (13%).

The proportion of construction workers in London who hold a skill card/certificate, but have no other construction qualification has continued to reduce, from 56% in 2012, to 40% in 2015, to 18% in 2018/19, and to 15% in the latest survey. This trend is also evident across the UK.

Overall, more than three in five (62%) construction workers in London have qualifications equivalent to Level 2 or above, a higher proportion than in 2018/19 (57%), but in line with the 2022 UK average of 61%.

Geographic mobility

Work history in the region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. More than two fifths (44%) report it is because their employer sent them there, slightly lower than the UK average (47%) and returning to the levels seen in 2015 (44%) after a peak in 2018/19 (62%).

While the proportion who grew up in London has increased from 16% in 2018/19 to 24% in the latest survey, this is significantly lower than the UK average of 46%. In contrast, construction workers in London are more likely than average to be working in London for family reasons (9% compared to 5%), because there are more jobs available (8% compared to 3%), or because they liked the area (4% compared to 1%).

Over two in five (43%) of construction workers in London have worked within their current region for their whole career, as in 2018/19, but now lower than the UK average (49%). A further third (35%) have worked in their current region for most of their career, meaning that 83% have remained in London for all or most of their career, in line with previous years (80% in 2018/19 and 84% in 2015), and in line with the UK average (83%).

Whereas in 2018/19 construction workers in London were among the least likely of the English regions to report that their last site was also in London (73%), in the latest survey they are among the most likely (81%).

Worker origins

Overall, approaching two in three (64%) construction workers in London were living in London when they started their construction career, compared to 59% in 2018/19 and 50% in 2015). This is the second lowest of any region/nation, only exceeded by the East Midlands (53%), and matched by the South East.

Travel to site

Approaching three quarters (73%) of construction workers in London were interviewed on a site that was located within the same region/nation as their permanent home, up from 63% in 2018/19 and in line with 2015 (71%). This is lower than the average across all regions of 85%.

Of the 27% who travel outside of their region to their current site, almost all (25%) are from a neighbouring region, as is the pattern for most other regions.

Close to half (47%) of construction workers in London have worked no further than 20 miles away from their home, up on the 36% who had done so in 2018/19, and significantly higher than the UK average of 33%. A further three in ten (28%) have worked between 21 and 50 miles away, in line with 2018/19 (28%) and somewhat lower than the UK average of 34%. This leaves one in five (20%) who have worked more than 50 miles away, significantly lower than the UK average of 33%, including 6% who have worked over 100 miles away (as compared to 13% in 2018/19).

Consequently, the average furthest distance travelled by construction workers in London is 35 miles, significantly lower than the UK average of 46, and the shortest distance of any nation/region.

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 13 miles, continuing a downward trend since 2015 (19 miles) and 2018/19 (16 miles), and a shorter distance than the UK average of 16 miles.

Over half (53%) of those providing a response travel less than 10 miles to work, in line with 2018/19 (49%), a third (34%) travel between 10 and 19 miles (compared to 22% in 2018/19), and 15% travel further than this (compared to 29% in 2018/19).

Use of temporary accommodation

One in ten (9%) construction workers in London report that they are currently staying in temporary accommodation while working at their site, in line with previous years (10% in 2018/19 and 8% in 2015). This is higher than the national average of 5%, and the highest of any nation/region.

Site duration and change

Among workers in London who are currently employed on a temporary basis (30% of all construction workers) 1% expect to work for the company/person/agency paying them for the rest of the week, 14% expecting to do so for another one to four weeks, 17% for one to six months and the same proportion (17%) for six to twelve months. One in eight (12%) expect to stay with their current company/employer for more than a year. Two in five (39%) do not know how much longer they expect to be working, in line with 2018/19 (40%), but somewhat higher than the UK average (32%).

Overall, 13% of construction workers in London do not expect to work on that site for more than a month, in line with 2018/19 (14%) and the UK average (12%). Just 2% believe they will be there for less than a week, as was the case in 2018/19. Half (51%) anticipate being on site for more than a month but less than a year, somewhat lower than the 58% who did so in 2018/19, but in line with the UK average of 53%. One in seven (14%) expect to be on site for more than a year, in line with 2018/19 (16%), and with the UK average of 13%. One in five (22%) are uncertain in this regard, higher than 2018/19 (11%), but in line with the UK average of 22%.

While a majority (72%) of all construction workers in London are confident that when they finish this job, they will get a job that allows them to travel from their permanent home to work on a daily basis, this continues a decline on this measure since 2015 (76% in 2018/19 and 79% in 2015). However, it is in line with the national average of 69%.

The proportion who are sure that this will not be the case has remained stable (4% compared to 7% in 2018/19), while the proportion who say it depends where the work is has increased, from 12% in 2018/19 to 18% in the latest survey, as is the case across the UK overall (from 8% in 2018/19 to 20% in 2022).

Sub-sector and sector mobility

Sub-sector mobility

Following peaks in 2018/19, the profile of construction work undertaken in London has returned more to 2015 levels.

While new housing (60%), commercial work (42%) and housing repair and maintenance (40%) remain the most common types of work undertaken in London, this is to a significantly lesser extent than was the case in 2018/19 (67%, 62% and 47% respectively).

There have also been decreases in the extent to which all other types of construction work are undertaken in London, but particularly in relation to public non-housing work (from 55% to 27%) and infrastructure building projects (from 37% to 19%).

This places London below the UK average in relation to new housing (60% compared to 78%), private industrial work (28% compared to 35%), public non-housing work (27% compared to 32%) and infrastructure building projects (19% compared to 23%).

As a result of these decreases, there has been a significant increase in the proportion of construction workers in London who have worked on only one type of project, from 28% to 50% in the latest survey, returning this to 2015 levels (51%). This is higher than the UK average of 42%.

Leaving the sector

Around four in five (79%) construction workers in London think it is likely that they will still want to do so, including 39% who say they definitely will be, and 29% who think it is very likely. This is in line with the UK average of 82%.

Around one in ten (8%) say it is unlikely that they will still want to work in construction in five years' time (compared with a UK average of 7%).

Introduction

Aims and objectives

Following on from previous surveys conducted for CITB in 2018/19, 2015, 2012, 2007 and 2005, BMG Research was commissioned to undertake a UK-wide survey of the mobility and skills of UK construction workers in 2022.

The primary aim of this project is to provide robust and reliable information from site-based workers across the UK construction industry on their qualification levels and the extent of their occupational and geographic mobility. This work enhances the evidence-base for skills planning, particularly in respect of profiling the existing workforce and identifying where skills gaps might emerge as a result of occupational and geographic movement. The findings will assist the industry, government, training providers and others with responsibility for industry skills development to direct their work with greater accuracy and effect.

The specific objectives of this research project are to:

- Examine the qualification levels of the construction industry workforce in the UK and analyse what part qualifications have played in career progression.
- Identify, quantify and analyse the extent to which the workforce in each region/nation within the UK comprises workers originating or living in other parts of the UK (or further afield) and mobility and travel to work.
- Examine the occupations and qualification levels of the mobile UK-origin workforce and of that part of the workforce with overseas origins.
- Examine the scale and extent of occupational mobility within the construction workforce to see how workers in construction occupations change their occupations over time, both within construction and in relation to other sectors, and, related to this, the extent to which managers and supervisors have received training specifically to enhance their managerial skills.

The focus of the survey is on site-based physical delivery of construction projects and, therefore, excludes associated clerical and sales occupations and professionals such as architects, surveyors and office-based managers.

This report discusses the findings within Greater London.

Method

The 2022 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2018/19. Overall, 3,005 interviews with construction workers in site-based roles across the UK were required, split between the 12 standard regions/nations. In total, 443 interviews were conducted in London.

Sampling

This sub-section provides an overview of the sampling methodology employed for the survey. Further detail is provided in the technical report that accompanies this analytical report.

Although this survey focuses on the mobility of individual workers, the sampling strategy was to select construction projects (generally referred to in this report as 'sites') with sufficient workers on-site each day to enable a minimum of 10 interviews. This site-based approach was employed to ensure cost-effective face-to-face interviewing, comparable to that used in previous editions of the survey.

Also as in previous surveys, the commercially produced 'Glenigan' database of construction projects was used as the sampling frame.

Project eligibility criteria were:

- value: £250,000+
- contract stage: 'start on site'; 'contract awarded' or 'bills called' only
- site start date/end date: Active throughout planned fieldwork period

Where sites met these criteria, they were deemed eligible to participate. A target of 30 sites per English region and in each of Scotland, Wales and Northern Ireland was set in order to achieve a sufficient number of interviews in each. However, in some instances this target was not achievable due to site refusals to take part, some sites not meeting the eligibility criteria on further screening, or lower than expected numbers of on-site workers being available. In some regions, more than 30 sites were recruited to compensate.

Telephone-based site recruitment

BMG's research team recruited sites that were eligible and willing to support the research by allowing an interviewer to visit the site to interview at least 10 workers who were mainly in manual trades/roles. A recruitment questionnaire (reproduced in the technical report) was used to check the eligibility of the site and to collect important operational information that would be required by the interviewer visiting the site. The majority of recruitment was undertaken with individual site managers, but in a number of cases the recruiters also spoke with local, regional or national managers (often dependent upon the size of the company). At this stage recruiters booked a convenient time and appointment date for an interviewer

to visit the site and a confirmation email was sent to the relevant individual. Confirmation calls were made ahead of site visits to ensure recall of the visit.

Site visits

In the majority of cases, interviewers were allocated space to conduct interviews in the offices or canteen area. However, on some sites interviewers worked ‘on-the-hoof’ in active parts of the site (with or without a ‘chaperone’). All interviewers had completed the CSCS Health & Safety Test for Operatives immediately prior to fieldwork and had a PPE (Personal Protective Equipment) kit to comply with site requirements.

Interviews were completed using Computer Assisted Personal Interviewing (CAPI) techniques as well as self-completion techniques. They were undertaken between May and December 2022

Further detail on the interviewing process is provided in the technical report.

The following table shows the number of interviews achieved in each region/nation. In order to obtain strong bases for regional/national analysis, a quota of 200 completed questionnaires per region/nation was set, with an allowance of +/- 50 interviews per region/nation. However, at the analysis stage, weighting factors were applied to survey data to ensure that, for national analysis, regions/nations were represented in their correct proportions according to the size of the construction workforce per region/nation as reported in the government’s Annual Population Survey of economically active adults aged 16 and over.

Figure 1: Number of interviews in the weighted sample by region/nation

	Interviews	Weighted percentage
North East	206	3.3
North West	271	11.2
Yorkshire and the Humber	200	8.1
East Midlands	232	7.1
West Midlands	306	7.0
East of England	202	11.2
London	443	13.6
South East	283	15.5
South West	201	8.9
Scotland	233	8.2
Wales	202	4.0
Northern Ireland	226	2.5
UK	3,005	100.0

*Source Annual Population Survey via Nomis: Economically Active adults aged 16+, Oct 2021-Sep 2022; note that total percentage does not add exactly to 100 because of rounding

Further information on sampling and the sites included can be found in the technical report.

Methodological points to note

In discussing findings from this 2022 survey of mobility and skills in the UK's construction industry workforce, a number of methodological points are relevant, as follows.

Sampling variation (for example, random differences in the composition of the samples in different editions of the survey or in the different regional sub-samples within this year's survey) may induce apparent differences or exaggerate actual differences in survey findings over time or between regions which owe more to these sampling effects than to real world change. This effect is particularly likely when considering smaller sub-sets of data where such effects have the potential to have a proportionately greater impact. The point is not that differences in findings for different groups or over time are necessarily unreal but that a degree of care needs to be applied in interpreting the findings such that their consistency with other related data and with extraneous knowledge of the environment in which the survey took place is taken into account.

Further, on this question of interpretation, it is evident that a broad survey, as here, of large numbers of respondents using a structured questionnaire, produces statements of fact (as far as best survey practice can estimate 'fact') but does not necessarily explain the reason for a particular statistic or its change over time.

Notes on reading this report

A number of conventions have been employed within this report to assist with the concise presentation of numeric data and with brevity within text.

The base for statistics is described under each figure (table or graph) heading, with the base counts (unweighted) on dedicated rows of tables. Where tables include statistics on many different bases, the unweighted bases for 2022 data are shown in brackets.

All tables and graphs present percentages (unless otherwise stated) calculated upon the bases shown. Where 'mean' averages are shown, these are calculated upon the stated base, minus any responses 'not stated' or choosing a 'don't know/not applicable' response.

Tables and graphs are all labelled with a simple sequential 'Figure Number' and title. All tables and graphs have clearly labelled base sizes (for all sub-groups) and textual definitions of bases. The total of percentages shown in a table may vary slightly from 100% due to rounding to the nearest percentage point.

'**' is used to denote a statistic of less than 0.5% but greater than 0.

Analysis by region/nation should be read with caution because of their limited sub-sample sizes. Unweighted bases are shown throughout for guidance on this point.

Profile of construction site workers

This first section of the report provides a profile of construction site workers interviewed in the survey and where possible makes comparisons with previous years' surveys. The section examines: *personal demographics*, including gender, age, ethnicity, nationality (including length of time that workers have been resident in the UK) and disability; *current occupation*; *employment status* i.e. whether employed directly, self-employed or by an agency; and *employment contract basis* i.e. whether working on a temporary or permanent basis.

The section then moves on to examine career histories, including: the number of years respondents have worked in the construction industry, pre-construction employment histories, occupational switching, and progression within the construction sector.

Personal demographics

Figures 2 to 5 detail the demographic profile (gender, age, ethnicity, nationality and disability) of the 2022 sample of construction workers, compared with the 2018/19 and 2015 surveys and official statistics from the Annual Population Survey (where comparisons are possible).

Gender

While as in previous years of the survey, the vast majority of construction workers in manual roles interviewed in London were male (94%), this is to a lesser extent than the UK average (97%). Close to one in twenty (4%) were women. Male dominance is greater in the survey sample than in the UK workforce as a whole as this survey does not include those in office-based roles within the construction industry (either administrative or professional, where the incidence of female workers is higher) and interviews were conducted on relatively large construction sites (valued at £250,000+, with at least 10 workers), thereby excluding female construction workers on small building sites and in maintenance and repair (an industry segment in which women, for example in some small all-female businesses, may be slightly more frequent). More detail is shown in the following figure.

Figure 2: Gender profile of the sample compared with the UK profile and the Annual Population Survey

Base: All respondents

	London 2022 %	UK 2022 %	UK Workforce* %
Male	94	97	52
Female	4	2	48
Transgender	<0.5	<0.5	-
Non-binary	<0.5	<0.5	-
Prefer not to say	2	<0.5	-
<i>Unweighted bases</i>	<i>443</i>	<i>3,005</i>	<i>33,808,600</i>

Q43 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2021-Sep 2022

Age

Within London, the age profile of construction workers is younger than the UK average, and the wider UK workforce, as has been the case in previous years. Half (50%) are under 35 years old, as compared to the UK average of 45%, and the wider UK workforce of 36%. This is largely due to a significantly greater proportion of workers aged 25 to 34 (35%).

One in twenty (4%) are aged 60 or over, in line with previous years, and largely in line with the UK workforce overall (4%).

Figure 3: Age profile of the sample compared with 2018/19, 2015 and 2012 and the Annual Population Survey

Base: All respondents

	London 2022 %	London 2018/9 %	London 2015 %	London 2012 %	UK 2022 %		UK Workforce* %
16 to 19 years	4	2	3	1	6	16 to 19 years	4
20 to 24 years	11	11	11	14	13	20 to 24 years	9
25 to 34 years	35	35	34	37	26	25 to 34 years	23
35 to 44 years	23	26	28	24	24	35 to 49 years	33
45 to 54 years	15	17	13	15	17	50 to 64 years	28
55 to 59 years	4	5	4	7	8		
60+ years	4	3	4		6	65+ years	4
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>3,005</i>		<i>33,808,600</i>

Q44 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2021-Sep 2022

Ethnicity

In terms of ethnicity, the majority of construction workers in London continue to be of White origin (74%), however this is to a significantly lesser extent than was the case in previous iterations of the survey (85% in 2018/19, 84% in 2015 and 86% in 2012).

One in six (15%) are of Black, Asian or Mixed origin, in line with the UK working age population (12%).

Figure 4: Ethnic profile of the sample compared with previous surveys and the UK population

Base: All respondents

	London 2022 %	London 2018/9 %	London 2015 %	London 2012 %	UK 2022 %	UK population aged 16 to 64* %
White	74	85	84	86	91	84
Black	9	8	8	8	2	4
Asian	3	4	3	3	2	6
Mixed	3	2	-	-	1	2
Other/Not stated	4	1	4	4	3	4
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>3,005</i>	<i>41,439,500</i>

Q49 *Source Annual population Survey via Nomis: UK population aged 16-64 Oct 2021-Sep 2022

Figure 5 summarises the proportion of construction workers of non-white (ethnic minority) origin overall and within each region/nation and compares the profile with construction workers from the 2018/19, 2015 and 2012 surveys and with the population (aged 16-64) of each region/nation as a whole.

While at 19%, the proportion of construction workers in London of ethnic minority origin has increased since 2018/19, and is the highest of any nation/region, as has been the case in previous iterations of the survey, this is a significantly lower proportion than is represented among the London working age population (41%).

Figure 5: Proportion of construction workers of ethnic minority (Non-White) origin

Base: All respondents

	UK 2022 %	UK 2018/9 %	UK 2015 %	UK 2012 %	Non-white (ethnic minority) population aged 16-64* %
UK	7	6	4	4	14
East Midlands	3	2	2	2	14
East of England	5	5	3	4	12
London	19	15	15	12	41
North East	2	<0.5	<0.5	<0.5	6
North West	1	3	1	2	13
South East	11	10	8	3	12
South West	3	5	2	1	6
West Midlands	7	7	5	9	22
Yorkshire and the Humber	5	5	2	1	12
Wales	3	2	2	<0.5	5
Scotland	3	1	2	1	6
Northern Ireland	1	1	1	<0.5	4
<i>Unweighted bases</i>	<i>3,005</i>	<i>4,048</i>	<i>4,771</i>	<i>4,933</i>	<i>41,439,500</i>

Q49 *Source Annual population Survey via Nomis: UK Population aged 16-64 by ethnicity Oct 2021-Sep 2022

Country of origin

For the first time in 2018/19, construction workers were asked for details about their nationality and country of origin. The table below focuses on the non-UK nationalities that are most frequent in the 2022 survey.

As was the case in 2018/19, the majority of construction workers in London (59%, compared to 51% in 2018/19) originated from outside the UK, with similar proportions coming from EU (30%) and non-EU (29%) countries. One in five (19%) are Romanian.

Figure 6: Country of origin of non-UK national construction workers in the UK by region/nation as a percentage of the total workforce

Base: All respondents

Row percentages	Unweighted bases	EU %	Non-EU %	Albania %	Romania %	Lithuania %
UK	3,005	9	8	1	5	1
East Midlands	232	5	8	1	2	1
East of England	202	16	6	1	8	5
London	443	30	29	5	19	2
North East	206	2	1	0	<0.5	0
North West	271	2	2	0	1	0
South East	283	11	7	1	6	1
South West	201	2	2	<0.5	1	0
West Midlands	306	2	6	0	<0.5	<0.5
Yorkshire and the Humber	200	6	3	0	1	1
Wales	202	3	3	0	1	0
Scotland	233	4	2	<0.5	0	0
Northern Ireland	226	4	2	0	0	0

Q45 Note: Romania and Lithuania are included in the EU proportion. Albania is included in the non-EU proportion. In neither case, therefore, are these individual country proportions *additional* to the respective EU/non-EU proportions

Focusing on specific construction trades, there is a higher than average proportion of construction workers from non-EU countries among labourers/general operatives (43%).

By contract type, those employed directly are most likely to have been born in the UK (58%), those who are self-employed are most likely to have been born in EU countries (41%), and those employed via an agency are most likely to have been born in non-EU countries (50%).

Holding of passports

Around two in five (39%) construction workers in London hold a passport for another country, as compared to 13% across the UK as a whole. Half (49%) hold a UK passport, and one in twenty (4%) do not have a passport.

Of those construction workers that were born outside of the UK or have a non-UK passport, 3% have dual citizenship, 58% have settled status, 23% have pre-settled status and 5% have a sponsored Visa.

Length of time living in the UK

Two in five (39%) of London's construction workers have lived in the UK all their lives, down on the 50% who had done so in 2018/19, and much lower than the UK average of 80%.

The same proportion (39%) have lived in the UK for more than five years, while 16% have been in the UK for less than five years.

Figure 7: Length of time that construction workers have lived in the UK by region/nation

Base: All respondents

Row percentages	Unweighted bases	All their lives %	Up to 5 years %	More than 5 years %
UK	3,005	80	5	14
East Midlands	232	83	3	13
East of England	202	74	2	22
London	443	39	16	39
North East	206	96	<0.5	4
North West	271	93	<0.5	6
South East	283	77	7	16
South West	201	87	1	8
West Midlands	306	91	1	7
Yorkshire and the Humber	200	91	0	9
Wales	202	90	2	6
Scotland	233	92	5	3
Northern Ireland	226	92	2	5

Q39

Disability

Amongst all construction workers in London, 3% cent report that they have a long-term illness, health problem, or disability which limits the type of work they can do (as compared to 1% in 2018/19), in line with the UK average of 3%.

Occupational profile

Current job role

All workers were asked what their current trade or occupation is at their site. Respondents in a supervisory role were asked to detail their trade/occupation background, as their supervisory roles would be asked about later in the survey. Figure 8 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from the 2018/19 and 2015 surveys.

Labourers/general operatives account for the highest proportion of construction workers in London, (17%, compared to 12% in 2018/19 and 17% in 2015), in line with the UK average (18%).

Site managers, carpenters/joiners and electricians each account for around one in ten construction workers (11%, 10% and 10% respectively). Again, these are largely in line with the UK average. Other occupations account for less than one in ten of those interviewed in London.

Figure 8: Occupational profile

Base: All respondents. Mentions 1%+

	London 2022 %	London 2018/19 %	London 2015 %	UK 2022 %
Labourer/General operative	17	12	17	18
Site manager	11	17	6	9
Carpenter/joiner	10	10	8	9
Electrician	10	7	8	5
Bricklayer	6	6	5	10
Technical e.g. surveyor, maintenance technician	4	9	5	3
Plumber	4	4	5	3
Dryliner	4	1	6	3
Supervisor/foreman	3	4	1	2
Scaffolder	3	3	4	3
Banksman/Banksperson	3	2	3	2
Steel erector/rigger	2	2	2	2
Plant/machine operative	2	4	5	9
Project Manager	2	1	1	1
Pipe fitter	1	1	3	1
Ceiling fixer	1			1
Roofer	1	1	5	3
Painter/decorator	1	3	5	1
Plasterer	1	2	<0.5	1
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>3,005</i>

Q5

Supervisory roles

More than a third (37%) of construction workers in London say they perform a supervisory or management role on their site, fewer than in 2018/19 (45%), and significantly higher than the UK average of 28%.

As was the case previously, the incidence of workers in a supervisory role increases with age, from 14% of 16 to 24 year olds to 54% of those aged 45+, and with time in the industry, to 48% of those with more than five years' experience.

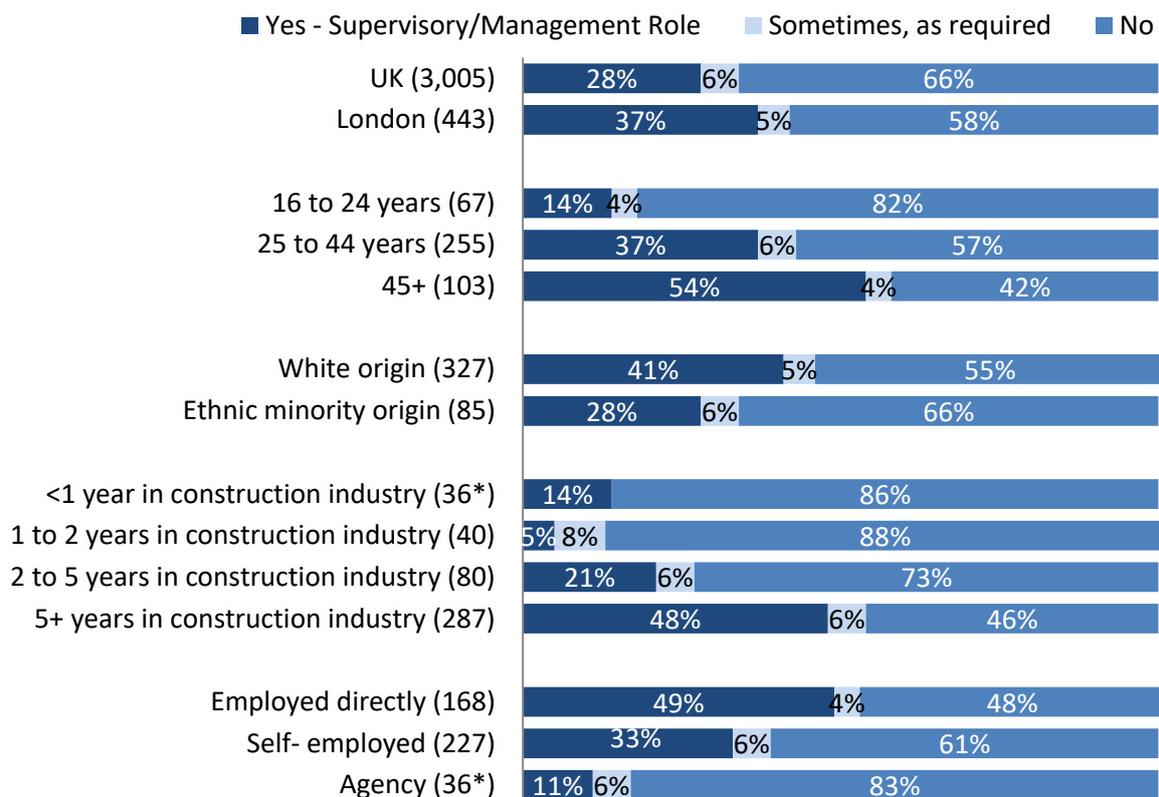
White construction workers are significantly more likely than workers from ethnic minority groups to report having a supervisory/management role (41% compared to 28%).

Similarly, a higher proportion of those who have worked in the construction industry for more than 5 years have supervisory roles than those that have worked in the industry for less than 5 years (38%, compared to less than 10% of those who have worked in the industry for less than five years).

As would be expected, workers who are directly employed by a company continue to be significantly more likely than those who are self-employed or work for an agency to perform a supervisory role (49% compared to 33% and 11% respectively).

Figure 9: Whether respondents perform a supervisory or management role

Base: All respondents



Q8. Unweighted bases in parentheses

* Caution: low base

Employment status

Half (51%) of construction workers in London are self-employed, a significantly higher proportion than was the case in 2018/19 (43%) and 2015 (39%), and significantly higher than the UK average of 42%.

There has been a corresponding decrease in the proportion who report being directly employed, from 47% in 2018/19 to 38% this year. This is below the UK average of 48%.

Around one in ten (8%) report working for an employment agency, in line with 2018/19 (10%) and the UK average (9%).

The proportion of workers who are self-employed largely increases with the length of time worked in the industry, from 31% of those in the industry for less than a year, to 53% of those in the sector for over five years.

Correspondingly, the proportion who work for an agency decreases with time worked in the industry, from 19% of those in the sector for less than a year, to 5% of those who have worked in the industry for more than five years.

Workers of White origin are significantly more likely than those from an ethnic minority background to be employed directly (41% compared to 29%), while workers from an ethnic minority group are significantly more likely than those of White origin to be employed via an agency (18% compared to 6%).

Figure 10: Employment status

Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	UK 2022 %	Years working in construction %			
					<1	1-2	2-5	5+
Self-employed	51	43	39	42	31	40	59	53
Employed directly by a company (contractor or sub- contractor)	38	47	51	48	44	38	25	41
Working for an employment agency	8	10	9	9	19	13	11	5
Working on some other basis	3	1	<0.5	1	6	10	5	1
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>3,005</i>	<i>36*</i>	<i>40</i>	<i>80</i>	<i>287</i>

Q20

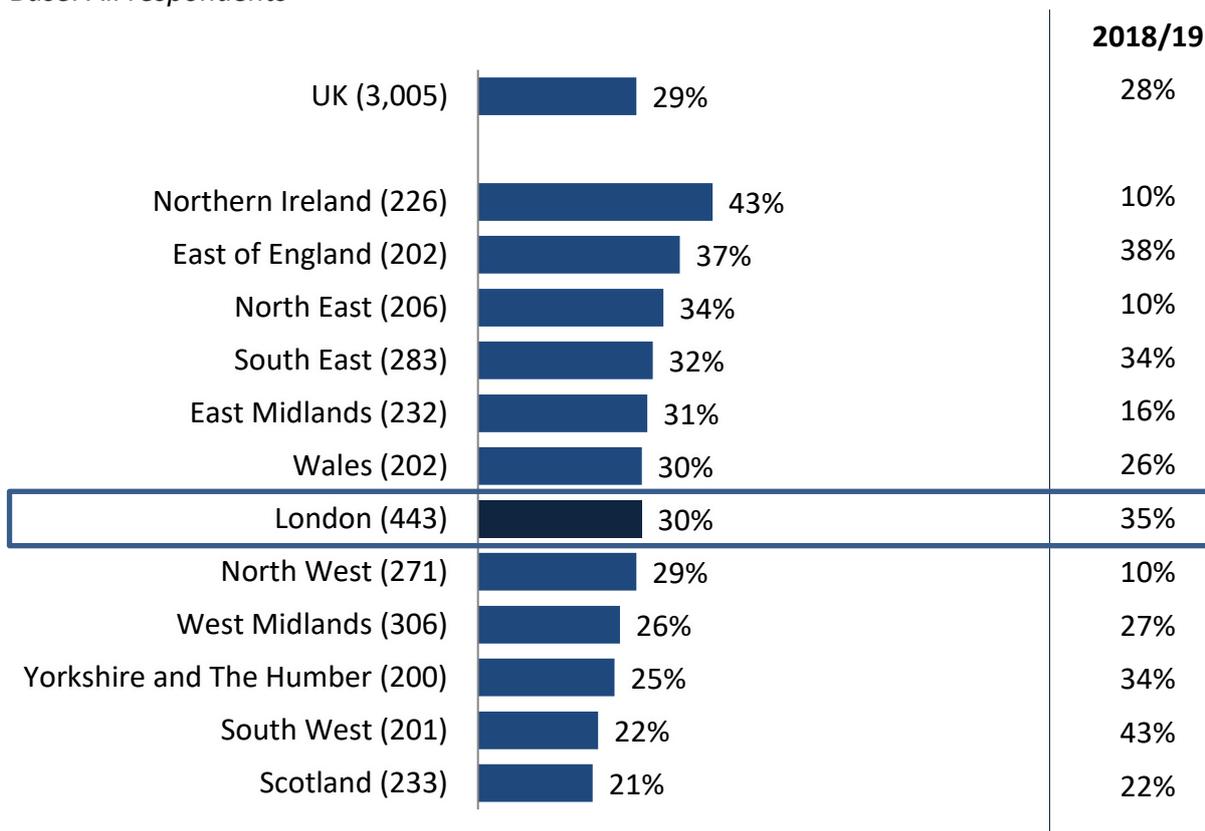
* Caution: low base

Employment contract basis

Three in ten (30%) construction workers in London are employed on a temporary, rather than a permanent (59%), in line with 2018/19 (35% and 58% respectively), and with the UK average (29% and 67% respectively). The remainder believe they have an ‘other’ type of contract arrangement (11%).

Figure 11: Proportion of workers employed on a temporary basis, by region/nation (including fixed-term contracts)

Base: All respondents



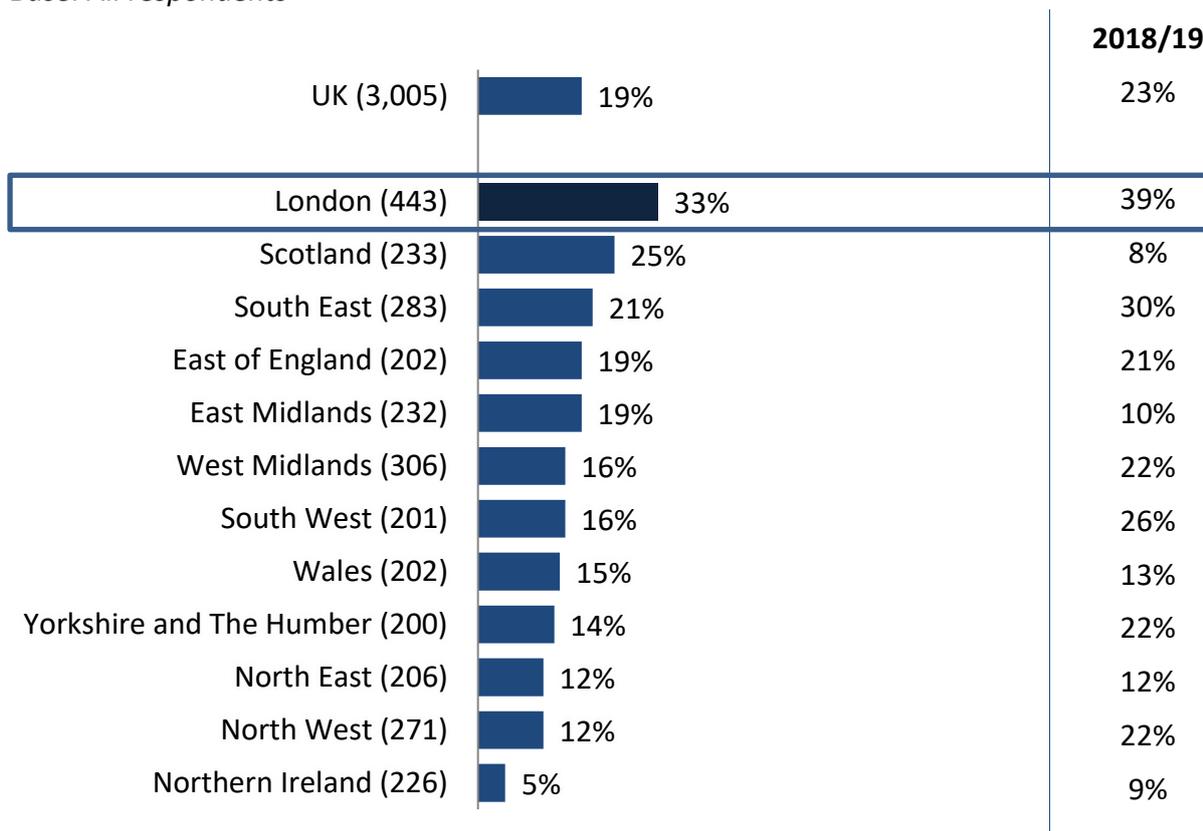
Q21. Unweighted bases in parentheses

Hours worked

While construction workers in London, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (51%, compared with a UK average of 59%), a significantly higher proportion of workers in London than the UK average report working for 50 or more hours per week (33%, compared to a UK average of 19%). However, this is directionally lower than the 39% of workers who reported doing so in 2018/19.

Figure 12: Proportion of workers that typically work 50 or more hours per week, by region/nation

Base: All respondents



Q22. Unweighted bases in parentheses

Work histories

Time in the sector

Around one in five (19%) of all construction workers in London have worked in the construction industry for over twenty years, slightly fewer than in 2018/19 (22%), and significantly lower than the UK average (30%), as was the case in 2018/19.

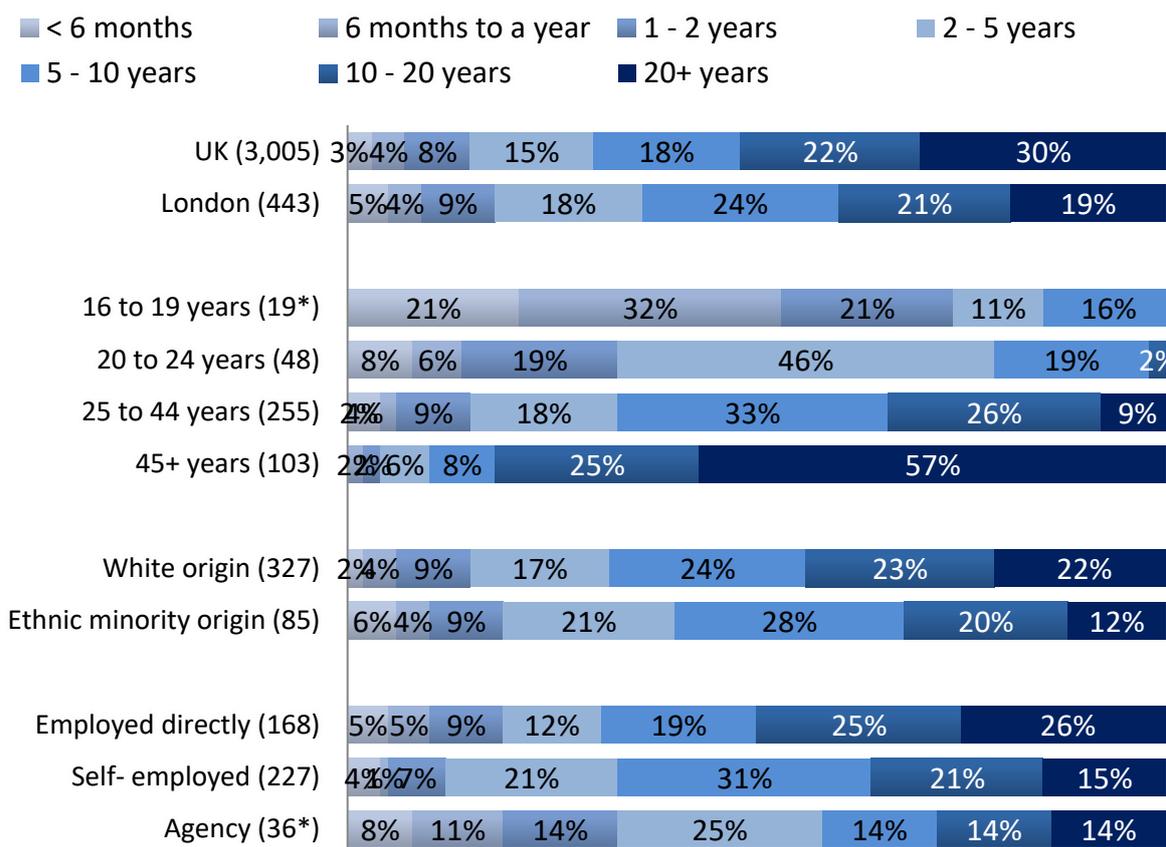
A third (35%) have been in the industry for less than five years, again in line with 2018/19 (33%), and significantly higher than the UK average of 29%.

As would be expected, the length of experience in the industry increases with age, with close to three in five (57%) of all construction workers aged 45 and over having more than 20 years' experience of working in the sector (compared to 56% in 2018/19).

Construction workers of ethnic minority origin are less likely than those of White origin to have been in the industry for more than ten years (32% compared to 45%).

Figure 13: Years spent working in the construction sector

Base: All respondents



Q1. Unweighted bases in parentheses

* Caution: low base

Compared with previous years, Figure 14 shows an increase in the proportion working in the sector for up to ten years, from 49% in 2018/19, and to 60% in the latest survey.

Figure 14: Years spent working in the construction sector (cumulative)

Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	UK 2022 %
Less than 6 months	5	2	7	3
Up to a year	8	6	11	7
Up to 2 years	17	12	18	14
Up to 5 years	35	33	35	29
Up to 10 years	60	49	54	48
Up to 20 years	81	78	78	70
More than 20 years	19	22	19	30
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>3,005</i>

Q1

Pre-construction employment histories

The proportion of construction workers in London who have worked pretty much continuously in the industry has remained stable over time (54%, compared to 56% in 2018/and 53% in 2015), and is lower than the UK average (61%). Consequently, the proportion who have only ever worked in construction is also lower than the UK average (66% compared to 71%).

Figure 15: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.

All respondents

	London 2022 %	London 2018/19 %	London 2015 %	UK 2022 %	Age %			
					16 - 19	20 - 24	25 - 44	45+
I've worked in construction pretty much continuously (and not in any other industry)	54	56	53	61	42	46	55	66
I have only worked in construction jobs but have had spells of being out of work	5	2	6	6	0	6	6	2
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	7	6	7	8	0	17	7	5
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	21	30	21	18	32	15	21	23
This is my first job. I haven't worked in any other industry.	7	5	8	4	16	15	5	3
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	5	1	4	4	11	2	6	1
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>3,005</i>	<i>19*</i>	<i>48</i>	<i>255</i>	<i>103</i>

Q2

* Caution: low base

Overall, 21% of construction workers in London say that their first job after full-time education was not in construction and that they moved into the industry after working in other sorts of jobs/sectors.

Those who had worked in other sectors before starting their construction careers were asked to give details of what they were doing immediately before they started working in construction. The most common sectors in which construction workers had started their careers were wholesale and retail trade (20%), accommodation and food services (11%), transportation and storage (9%), administrative and support services (8%) and manufacturing (7%).

The pattern of response largely reflects that in the UK, with a decline in those who started in manufacturing.

Figure 16: Industry worked in before starting work in the construction sector

Base: Where first job was not in construction Sectors mentioned by >5% of respondents

	London 2022 %	London 2018/19 %	London 2015 %	UK 2022 %
G – Wholesale and retail trade; repair of motor vehicles and motorcycles	20	14	27	22
I – Accommodation	11	3	5	10
H – Transportation and storage	9	12	7	10
C – Manufacturing	7	38	14	20
<i>Unweighted bases</i>	<i>116</i>	<i>112</i>	<i>113</i>	<i>624</i>

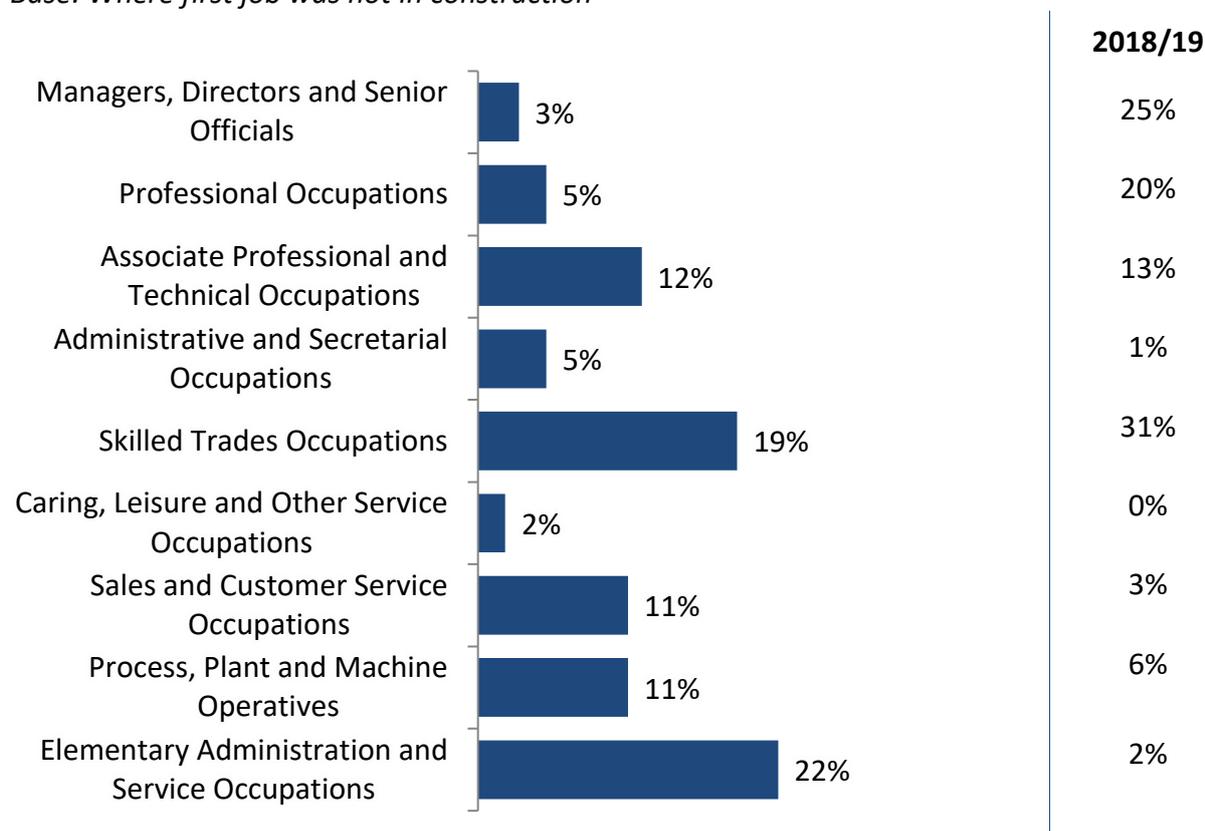
Q3

* Caution: low base

In terms of the job roles that respondents have held in other sectors, the highest proportions were in elementary administration and service occupations (22%) and skilled trade occupations (19%). The first of these has seen an increase since 2018/19 (2%), and the second has seen a decrease since 2018/19 (31%).

Figure 17: Job roles undertaken in other sectors in 2022 compared with 2018/19

Base: Where first job was not in construction



Q3. Unweighted base (116)

Occupational switching and progression within construction

All workers were asked whether they have worked in differing construction roles or occupations whilst working in the construction industry.

Overall, more than two fifths (44%) of construction workers in London have worked in more than one construction trade or occupation whilst working in the construction industry, in line with 2018/19 (44%), and higher than the UK average (35%).

Naturally, the proportion of workers who have had more than one role increases with length of time in the industry, from 29% of those with up to two years' experience, to 49% of those with five or more years' experience.

Site managers are significantly more likely than average to have worked in more than one construction trade or occupation (67%).

Construction workers who have worked in other roles/occupations within the construction industry, other than the role they are currently in, were asked to specify which trades/occupations they had previously worked in, with each worker able to list all previous occupations.

Amongst the 44% of all construction workers in London that had worked in at least one other role/occupation, 22% had worked in 1 previous role, 47% had worked in 2 previous roles, 22% had worked in 3 roles/occupations and 9% had worked in 4 roles/occupations. This is much in line with the UK average.

Workers are most likely to have previously worked as a labourer/general operative (34%), while 16% had previously worked as a carpenter/joiner and 12% as a bricklayer. This is very much in line with the UK average.

Figure 18: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	London 2022 %	UK 2022 %
Labourer/General operative	34	39
Carpenter/joiner	16	15
Bricklayer	12	12
Dryliner	10	5
Painter/decorator	7	4
Site manager	7	4
Banksman/Banksperson	6	7
Ceiling fixer	6	3
Plant/machine operative (e.g. Fork lift/JCB)	5	10
Insulation specialist	5	2
Plasterer	4	5
Rofer	3	4
Electrician	3	2
Plumber	3	3
Floorer	3	4
Technical e.g. surveyor, maintenance technician	3	2
Mechanical fitter	3	2
Pipe fitter	2	2
Scaffolder	2	2
Steel erector/rigger	1	2
Other	9	10
<i>Unweighted base</i>	<i>195</i>	<i>1,082</i>

Q7

Future career plans

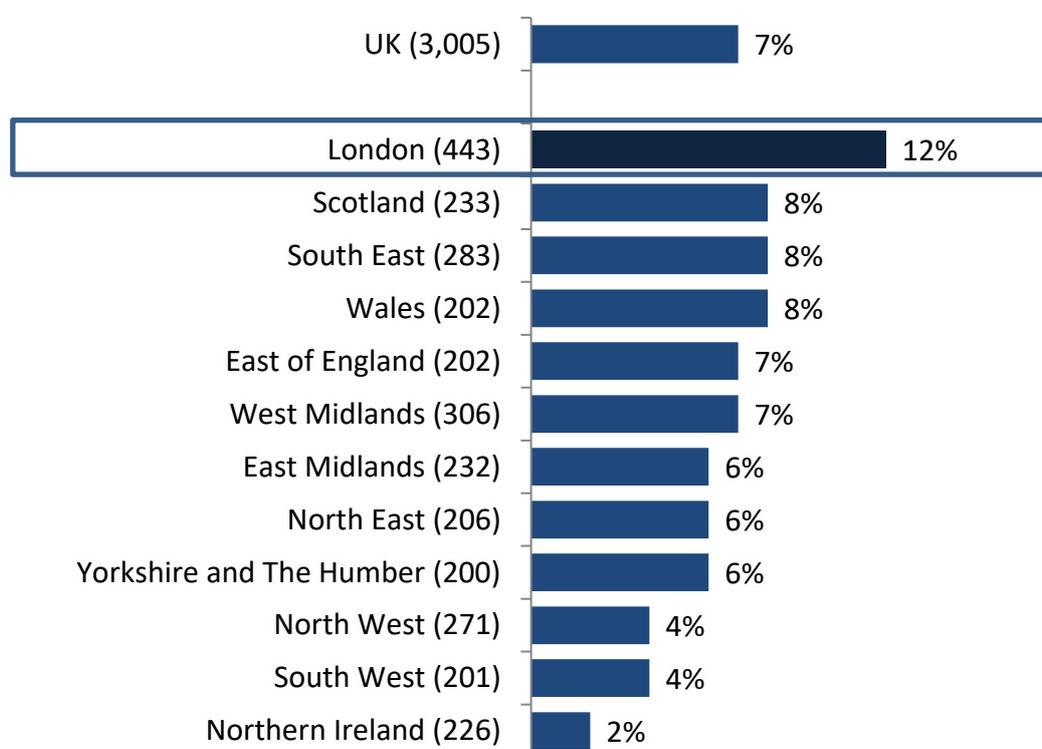
Seven in ten (71%) construction workers in London would like to carry on in the same trade or occupation, in line with 2018/19 (73%), but lower than the UK average of 80%.

One in eight (12%) would like to change their trade/occupation, fewer than in 2018/19 (15%), but higher than the UK average (7%), and the highest of all regions/nations. The remainder would like to leave construction (7%) or are unsure (9%).

Agency staff are more likely than average to want to leave the industry (31%), as are those who have been in the industry up to two years (20%) and those working as labourers/general operatives (19%).

Figure 19: Proportion of construction workers who would like to change their trade or occupation within the construction sector, by region/nation

Base: All respondents



Q33. Unweighted bases in parentheses

Qualifications and skills

This section of the report explores construction workers' qualification levels and other accreditations, examining differences by key variables such as region/nation, occupation and length of experience. The issues covered in this section include:

- the range of skill cards and certificates held by workers
- construction-related qualifications: gained before starting work in the construction sector; since starting work in the sector; and being worked towards
- workers' self-perceived need for additional training in basic skills

Construction skill cards and certificates

While over nine in ten (92%) of all construction workers in London report holding a skill card or certificate (e.g. CSCS or CSR), this is a reduction on the 98% who did so in 2018/19 and 2015. This reflects the UK picture, which has seen a similar decline (from 97% to 93%).

Correspondingly, the proportion who have no cards has risen from 2% in 2018/19, to 6% in the latest survey.

Figure 20: Proportion of workers who have a skill card/certificate, by region/nation

Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	London 2012 %
Total (3,005)	93	97	96	97
South West (201)	97	97	96	97
Northern Ireland (226)	97	97	90	100
North East (206)	97	94	96	99
Wales (202)	95	92	92	92
Yorkshire and the Humber (200)	94	98	97	97
South East (283)	93	98	98	96
London (443)	92	98	98	96
West Midlands (306)	91	99	98	100
Scotland (233)	91	99	88	98
North West (271)	91	98	97	99
East of England (202)	91	97	96	98
East Midlands (232)	90	93	93	99
<i>Unweighted bases for 2022 in parentheses</i>				

Q12

In terms of the type of skill card or certificate held by construction workers in London, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (82%), but to a lesser extent than 2018/19 (87%) and 2015 (89%).

Close to one in ten (8%) hold the CPCS (Construction Plant Competence Scheme), in line with 2018/19 (8%), and 3% hold the CISRS (Construction Industry Scaffolders Record Scheme), again in line with 2018/19 (3%).

There are few sub-group differences in the extent to which construction workers in London hold cards, with the exception that those in the industry for five years or more are more likely than average to hold CSCS (85%) and CPCS (11%), those employed directly or via an agency are more likely than average to hold none (11% and 17% respectively), and those who are self-employed are more likely than average to hold CSCS (88%).

Figure 21: Type of skill card/certificate held

Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %
CSCS (Construction Skills Certification Scheme) (GB)	82	87	89
CSR (Construction Skills Register) (NI)	2	3	1
CISRS (Construction Industry Scaffolders Record Scheme)	3	3	4
CPCS (Construction Plant Competence Scheme)	8	8	7
Other	6	6	6
<i>Unweighted bases</i>	443	375	452

Q12

Workers who hold a CSCS card were asked what colour their cards are. Overall 9% of CSCS card holders have Red cards, three in ten (29%) have Green cards, down on the 38% who did so in 2018/19, and three in ten (30%) have Blue cards. Over one in ten (14%) have Gold cards, 8% have Black cards, with other types of card held by less than 5%.

Figure 22: Colour of CSCS card held

Base: Where CSCS card is held

	London 2022 %	London 2018/19 %
Red – Trainee	7	4
Red – Experienced worker card	2	1
Green – construction site operative card	29	38
Blue – skilled	30	25
Gold – supervisor card	7	5
Gold – Advanced craft/skilled worker	7	7
Black – contracts manager card	8	8
Academically Qualified Persons Card	3	4
Professionally Qualified Persons Card	1	1
Apprentice Card	1	1
Other	3	5
Unsure	1	1
<i>Unweighted bases</i>	<i>364</i>	<i>325</i>

Q13

Card colours vary significantly according to current occupation/trade. Labourers/general operatives are more likely than average to hold Red (16%) and Green (75%) cards, while site managers are more likely than average to hold Gold (28%) and Black (31%) cards, and Academically Qualified Persons Cards (13%).

Figure 23: Colour of CSCS card held, by current occupation

Base: All respondents

	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold: Advanced craft %	Gold: Supervisors card %	Black %
Bricklayer (26*)	12	4	15	54	12	0	4
Carpenter/joiner (40*)	3	0	28	53	5	10	3
Electrician (28*)	11	4	21	4	32	0	7
Labourer/general operative (57)	16	0	75	5	0	0	0
Site manager (45)	11	2	9	2	4	24	31
<i>Unweighted bases in parentheses</i>							

Q13

* Caution: low base

Construction qualifications held

Respondents were asked about the qualifications they held after leaving full-time education and starting their first proper job in construction.

Overall, more than two in five (43%) construction workers in London report having no construction-related qualifications when they started their first job. This is significantly lower than the 70% who reported this in 2018/19, and the 83% who did so in 2015, but in line with the UK average, which has also declined significantly from 72% to 47%. Those employed via an agency are more likely than average to report having no qualifications (58%), as are labourers/general operatives (55%).

After being asked about the qualifications they had when they first started their career, all workers were asked what other formal qualifications relevant to construction they have gained since starting in the industry. By combining the responses to both these questions the highest level of construction qualification held at the time of interview (including the type of qualification, the subject of the qualification, and its level) is derived.

Overall, seven in ten (70%) of construction workers in London report holding a construction-related qualification, in line with the 74% who did so in 2018/19, and the UK average of 69%.

Those aged 25 to 44 are more likely than average to hold a construction related qualification (76%), as are workers from White backgrounds (72%), those in the industry for five or more years (77%), permanent workers (74%) and electricians (85%).

Figure 24: Proportion of workers that hold any construction-specific qualification

Base: All respondents

		London 2022 %	London 2018/19 %	London 2015 %	London 2012 %	UK 2022 %
Total (443)		70	74	52	60	69
Age	16 to 19 years (19*)	68	11	58	0	54
	20 to 24 years (48)	56	58	56	44	64
	25 to 44 years (255)	76	76	52	63	72
	45+ years (103)	68	83	56	62	69
Length of time in construction	<1 year (36*)	56	41	33	0	46
	1 to 2 years (40*)	38	58	45	28	43
	2 to 5 years (80)	63	54	28	53	62
	5+ years (287)	79	84	64	67	75
Current contract type	Employed directly (168)	74	80	59	67	69
	Self-employed (227)	74	74	50	63	74
	Agency (36*)	42	47	37	23	50
<i>Unweighted bases for 2022 in parentheses</i>						

Q15/Q16

* Caution: low base

Type of construction qualifications held

Based on the qualifications that workers had when they first started working in the construction industry and any they have gained since, Figure 25 summarises the types of qualifications that workers hold and compares the figures to previous surveys (amongst those who have any qualifications and who provided a response).

As in previous years, the qualifications most likely to be held by construction workers in London are NVQ/SVQ qualifications (51%), the same proportion seen in 2018/19.

One in six (18%) construction workers with qualifications hold City & Guilds qualifications, again returning this to levels seen previously following a dip in 2018/19 (8%), one in nine (11%) hold an apprenticeship, an uplift on the 5% who did in 2018/19, and fewer (8%) hold a degree.

Less than one in twenty construction workers with qualifications hold an HNC/HND/BTEC Higher, and a similar proportion hold a Construction Award (both 3%).

Figure 25: Main type of qualification held

Base: Workers with qualifications (valid responses)

	London 2022 %	London 2018/19 %	London 2015 %	London 2012 %	UK 2022 %
NVQ/SVQ	51	51	68	72	69
City & Guilds	13	8	18	10	18
Construction Award	2	-	-	-	3
Apprenticeship	9	5	6	0	11
HNC/HND/BTEC Higher	3	4	3	2	5
Degree	8	13	10	4	5
Other	15	38	12	4	12
<i>Unweighted bases</i>	<i>275</i>	<i>244</i>	<i>182</i>	<i>163</i>	<i>2,093</i>

Q15/Q16

Additional formal training

Self-assessment of basic skills needs

Given the need for construction workers to read instructions and record information it is important to ensure that the workforce has the skills required to perform these tasks. The survey therefore asked all workers whether or not they perceive the need for training in any of a list of specified basic skills to help with their work.

There has been a significant increase in the proportion of construction workers who identify a need for any training, from 19% in 2018/19, to 44% in the latest survey.

While there have been increases across the board, they are most pronounced in relation to speaking English, from 14% in 2018/19 to 29% in the latest survey.

There are no differences by ethnicity.

Figure 26: Self-assessed need for training in basic skills

Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	London 2012 %	UK 2022 %
ANY	44	19	26	26	19
Speaking English	29	14	16	14	9
Reading	21	7	9	11	9
Writing	17	7	9	11	7
Maths	10	5	6	10	6
Digital skills	9	-	-	-	4
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>3,005</i>

Q37

Current study for additional construction qualifications

Overall, approaching a quarter (23%) of construction workers in London are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications), significantly higher than the UK average of 13%, and higher than any other region/nation. It also continues the increases seen since 2012, where 12% were working towards formal qualifications.

Interestingly, the differences seen by age in other regions are less apparent in London, where levels are relatively consistent regardless of age. London also goes against the national picture in that it is those who are self-employed are more likely than average to be working towards additional qualifications (27%, compared to a UK average of 3%), rather than those who are employed directly.

By qualification level, those with Level 1 (38%) and Level 2 (30%) qualifications are more likely than average to be working towards additional qualifications, and those with no qualifications are less likely than average to be doing so (10%).

Figure 27: Proportion working towards additional construction qualifications

Base: All respondents

		London 2022 %	London 2018/19 %	London 2015 %	UK 2022 %
Total (443)		23	19	14	13
Age	16 to 19 years (19*)	32	67	31	43
	20 to 24 years (48)	29	28	27	24
	25 to 44 years (255)	24	18	14	11
	45+ years (103)	17	14	7	5
Length of time in construction	<1 year (36*)	36	45	17	28
	1 to 2 years (40*)	28	25	21	27
	2 to 5 years (80)	23	24	22	20
	5+ years (287)	21	15	11	8
Contract type	Employed directly (168)	18	24	15	15
	Self- employed (227)	27	14	13	10
	Agency (36*)	19	22	21	8
Highest qualification level	None (84)	10	29	11	11
	Level 1 (37*)	38	9	11	17
	Level 2 (124)	30	6	19	12
	Level 3 (97)	25	24	14	11
	Level 4+ (54)	13	22	22	16
<i>Unweighted bases for 2022 in parentheses</i>					

Q18

* Caution: low base

Of the 102 construction workers in London² who are currently studying for a qualification (and who provided a response) two in three (65%) are studying for an NVQ/SVQ, one in twenty for an apprenticeship (7%), a degree (6%), City & Guilds (4%), or a Construction Award or HNC/HND/BTEC Higher (both 3%).

Supervisory and managerial qualifications and training

As reported earlier, two in five (37%) of construction workers in London perform a supervisory or management role at their site.

Amongst those who do not currently perform supervisory/management roles and have not had this role before, a third (33%) want to become a supervisor or manager in the future, significantly higher than the UK average of 17%, but somewhat down on the 41% who did so in 2018/19. A further one in eight (12%) have held such a role before and wish to do so again in the future.

There are few real differences by age, length of time in construction or contract type.

Figure 28: Whether those who are not currently supervisors want to be one in the future

Base: Where do not perform supervisor/management roles on site

		Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
2022 UK (1,982)		17	6	59	18
2022 London (257)		33	12	35	19
Age	16 to 19 years (16*)	38	6	25	31
	20 to 24 years (39*)	51	5	21	23
	25 to 44 years (145)	33	15	36	16
	45+ years (43*)	26	9	51	14
Length of time in construction	<1 year (31*)	39	10	19	32
	1 to 2 years (35*)	37	6	43	14
	2 to 5 years (58)	40	7	29	24
	5+ years (133)	29	17	40	15
Contract type	Employed directly (80)	26	10	46	18
	Self-employed (138)	38	12	28	22
	Agency (30*)	27	20	47	7
<i>Unweighted bases for 2022 in parentheses</i>					

Q9

* Caution: low base

Over two in five (42%) of all construction workers in London have received formal training designed to improve managerial or supervisory knowledge or skills, in line with the 46% who had in 2018/19, and higher than the UK average of 33%. Among those who have or have

² Number of workers (unweighted)

had some form of supervisory or management responsibilities, four in five (82%) have received formal training, in line with 2018/19 (85%), and with the UK average (80%).

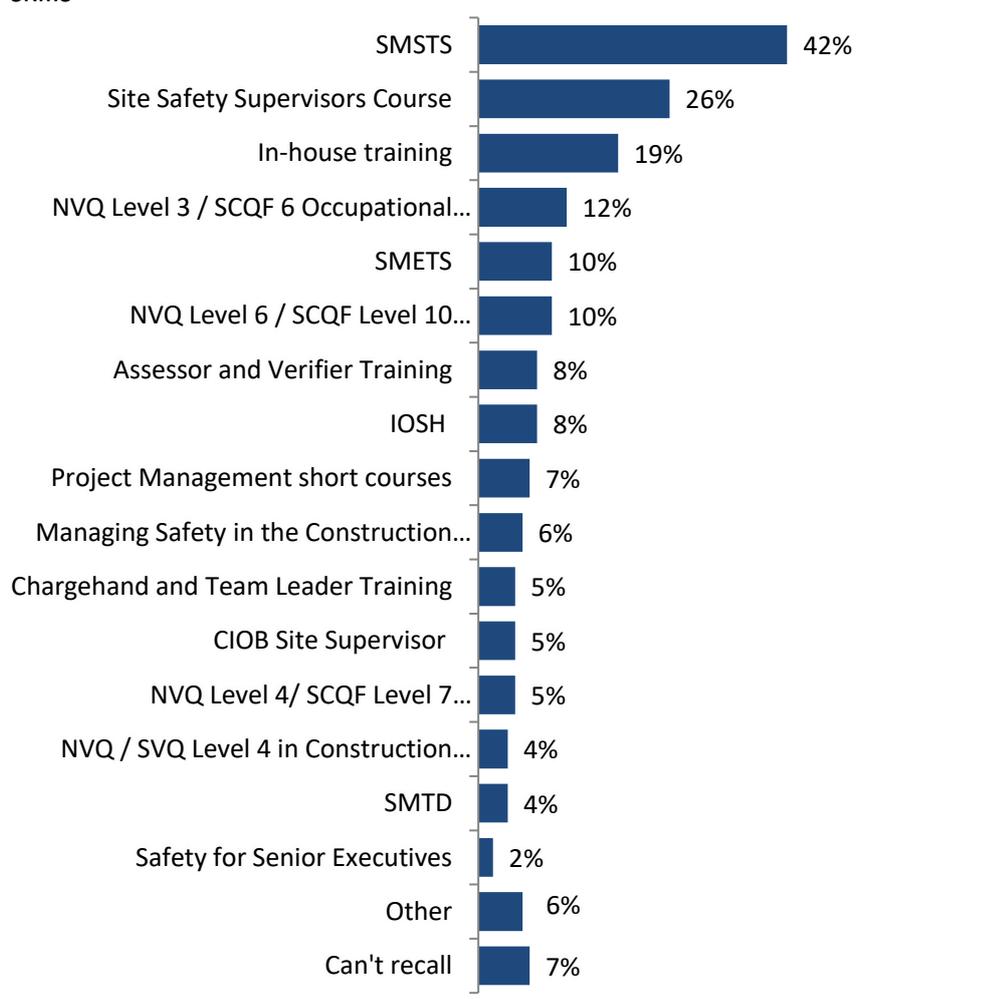
The proportion that has undertaken any managerial or supervisory training increases with age, from 21% of those aged 16 to 24, to 53% of those aged 45 or over. Likewise it increases with length of time in the industry, from 25% of those in construction for less than a year, to 52% of those in construction for five or more years.

Construction workers employed directly are also more likely than average to have received formal training in this area (51%), as are those in permanent roles (49%). Over nine in ten (92%) of site managers have received formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken, SMSTS is most frequently mentioned by those who have undertaken any training (42%), followed by Site Safety Supervisors Courses (26%) and in-house training (19%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

Figure 29: Types of managerial/supervisory training undertaken

Base: Where received formal training designed to improve managerial or supervisory knowledge or skills



Q11. Unweighted base = 186

Overall skill levels

An overview of the qualification and skill levels of construction workers surveyed has been derived by combining data from various separate measures and is presented in Figure 30 below.

As in previous years, the vast majority (95%) of construction workers in London have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview). While this is in line with the UK average (96%), it is lower than the 99% who did so in 2018/19.

As has been noted above, the proportion of construction workers in London who are working towards additional qualifications has continued to increase over time, from 12% in 2012, to 23% in the latest survey, and is now significantly higher than the UK average (13%).

The proportion of construction workers in London who hold a skill card/certificate, but has no other construction qualification has continued to reduce, from 56% in 2012, to 40% in 2015, to 18% in 2018/19, and to 15% in the latest survey. This trend is also evident across the UK.

Figure 30: Qualification status summary

Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	London 2012 %	UK 2022 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	95	99	98	96	96
Holds a formal construction qualification or a skills card/certificate	95	99	98	96	96
Holds a skills card/certificate	92	98	97	96	93
Holds a skills card/certification but no other qualification	15	18	40	56	19
Working towards a qualification	23	19	14	12	13
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>3,005</i>

Q12/Q15/Q16/Q18

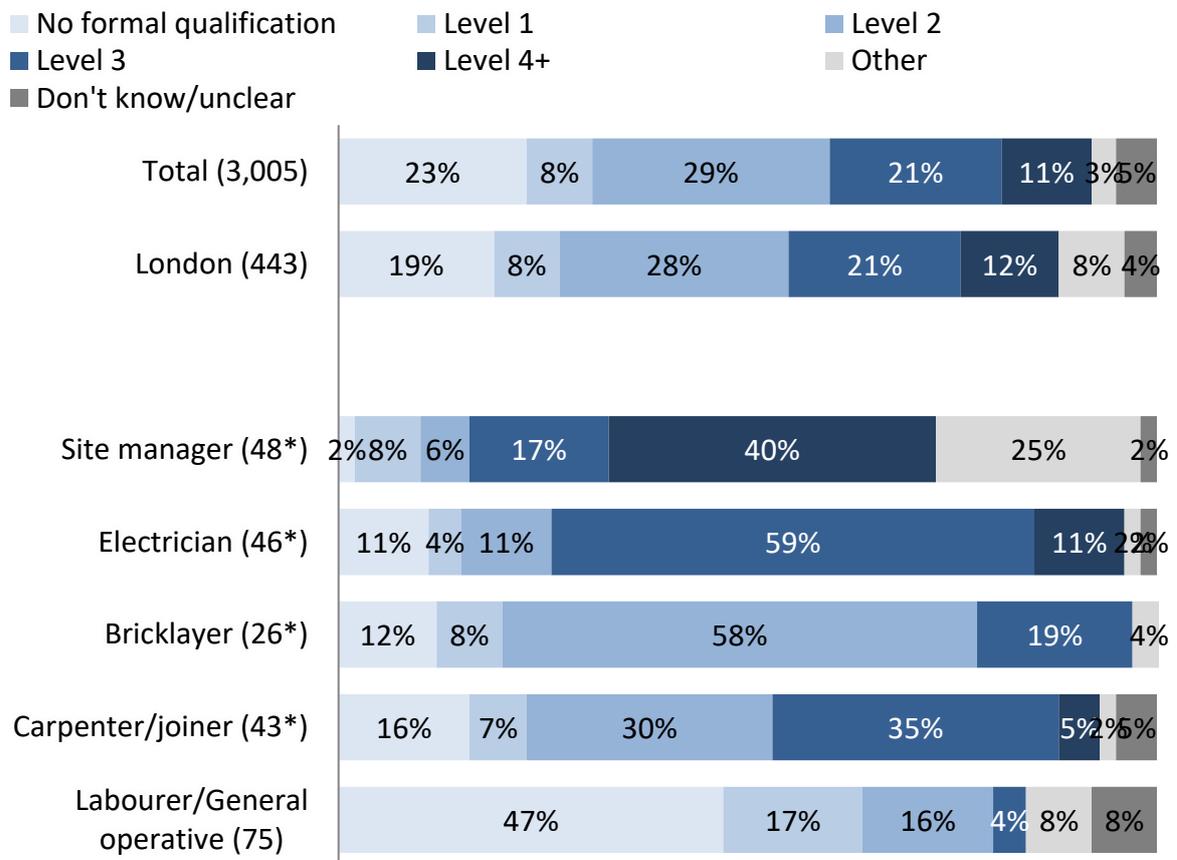
Based on all questions relating to qualifications it is possible to calculate each worker’s highest qualification level, and Figure 31 summarises construction workers’ highest level of qualification, overall and by occupation.

Overall, more than three in five (62%) of construction workers in London have qualifications equivalent to Level 2 or above, a higher proportion than in 2018/19 (57%), but in line with the 2022 UK average of 61%.

By occupation, site managers are most likely to hold the highest level of qualifications (63% hold level 3 or above, and 44% hold level 4 or above).

Figure 31: Current qualification level, by occupation

Base: All respondents who provided a valid response



Q15/Q16. Unweighted bases in parentheses

* Caution: low base

Geographic mobility

This section of the report on geographic mobility helps to identify which regions/nations of the UK are net ‘importers’ or ‘exporters’ of construction workers, as well as which elements of the construction workforce are the most mobile (based on region/nation of residence, region/nation of birth and type of contract). The measures included in this section are:

- reasons for working in current location
- comparisons of current location with workers’ region/nation of origin
- proportion of construction workers’ career that has been spent working in the current region/nation
- whether workers commute daily to their current site or whether temporary accommodation is used
- miles travelled to site each day
- whether their next site will be in commuting distance or will require temporary accommodation

Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. More than two fifths (44%) report it is because their employer sent them there, slightly lower than the UK average (47%) and returning to the levels seen in 2015 (44%) after a peak in 2018/19 (62%).

While the proportion who grew up in London has increased from 16% in 2018/19 to 24% in the latest survey, this is significantly lower than the UK average of 46%. In contrast, construction workers in London are more likely than average to be working in London for family reasons (9% compared to 5%), because there are more jobs available (8% compared to 3%), or because they liked the area (4% compared to 1%).

Figure 32: Reasons for choosing to work in current location – prompted, multiple response
Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	UK 2022 %
Employer sent you here	44	62	44	47
You grew up here/have always lived here	24	16	35	46
Construction work is better paid in this area	11	8	11	4
Family reasons	9	5	4	5
There are more jobs available in this area	8	16	16	3
Came to the area to take up this/another job	6	4	7	5
Because you like it or feel it offers opportunities for better quality of life	4	2	2	1
Better promotional prospects in this area	2	2	2	1
<i>Unweighted bases</i>	443	375	452	3,005

Q28

Over two in five (43%) of construction workers in London have worked within their current region for their whole career, as in 2018/19, but now lower than the UK average (49%).

A further third (35%) have worked in their current region for most of their career, meaning that 83% have remained in London for all or most of their career, in line with previous years (80% in 2018/19 and 84% in 2015), and in line with the UK average (83%).

Unsurprisingly the proportion of workers who have spent all of their time in the current region/nation reduces with age, from 63% of those aged 16 to 24 to 39% of those aged 45 or over.

Figure 33: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	London 2012 %	UK 2022 %
All of your time	43	43	46	37	49
Most of it	35	37	38	34	34
Around half your time	9	9	8	16	8
A small proportion of your time	3	9	4	7	5
Only on this job (this is the first site you've been to in this region/nation)	2	2	2	2	1
Don't know	7	<0.5	2	3	3
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>3,005</i>

Q26/Q27

In London, over half of construction workers (55%) indicate their employer operates nationwide, and this is lower than 2018/19 (74%) and the UK average of 73%, and the lowest of any region/nation. A third (36%) report that their employer operates only in London, up on the 22% who did so in 2018/19.

Region/nation worked in before current site

Thinking about the last construction site they worked on before their current one, in the majority of cases, workers' last sites are in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 34 illustrates.

Whereas in 2018/19, construction workers in London were among the least likely of the English regions to report that their last site was also in London (73%), in the latest survey they are among the most likely (81%).

Figure 34 Region/nation currently working in compared with the region/nation of workers' immediately previous construction sites

Base: Where had previous job(s) *denotes less than 0.5%

Region/nation of last site	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands (EM)	51	6	*	6	1	0	0	1	0	1	9	5
East of England (EE)	5	66	1	0	*	0	*	5	2	1	6	2
London (GL)	3	10	81	1	1	0	0	12	1	2	4	2
North East (NE)	1	4	0	65	1	0	1	2	1	1	*	1
North West (NW)	2	0	1	8	87	0	*	4	0	0	8	13
South East (SE)	6	10	11	0	1	1	0	66	3	2	1	1
South West (SW)	*	2	1	0	0	0	0	5	84	6	0	1
West Midlands (WM)	13	1	0	10	5	0	0	5	1	3	66	3
Yorkshire & Humber (YH)	15	1	0	10	2	*	0	*	1	0	2	72
Northern Ireland (NI)	1	0	0	0	0	85	0	0	0	0	0	0
Scotland (SC)	1	0	*	0	0	1	98	0	0	0	1	0
Wales (WA)	0	1	0	0	*	0	0	*	3	84	1	1
Republic of Ireland	0	0	*	0	0	13	0	0	0	0	*	0
Other parts of Europe	0	0	1	0	1	0	*	*	0	0	0	0
Outside of Europe	0	0	1	0	0	0	0	*	1	0	0	0
Other / Unsure	1	0	3	0	*	0	0	1	5	1	2	1
<i>Unweighted Bases</i>	216	183	392	195	252	226	226	264	183	193	290	184

Q32

Worker origins

Workers were asked which region/nation they were living in just before they got their first job in construction in the UK.

Overall, approaching two in three (64%) construction workers in London were living in London when they started their construction career, compared to 59% in 2018/19 and 50% in 2015). This is the second lowest of any region/nation, only exceeded by the East Midlands (53%), and matched by the South East.

Figure 35: Region/nation currently working in compared with workers' region/nation of residence prior to first starting work in construction

Base: All respondents *denotes less than 0.5%

Original home	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands (EM)	53	5	1	7	*	0	0	1	*	1	5	5
East of England (EE)	7	67	5	0	0	0	0	3	1	*	6	1
London (GL)	2	13	64	1	*	1	0	14	3	1	1	4
North East (NE)	2	3	*	67	3	0	1	1	*	*	*	0
North West (NW)	1	0	1	6	89	0	0	4	*	1	6	13
South East (SE)	3	7	10	*	*	0	0	64	3	*	2	1
South West (SW)	*	*	1	*	0	*	0	5	81	3	*	0
West Midlands (WM)	13	1	1	8	4	*	0	4	*	0	74	1
Yorkshire & Humber (YH)	15	2	1	8	2	*	0	0	0	0	2	75
Northern Ireland (NI)	1	0	*	0	0	92	0	*	0	0	0	0
Scotland (SC)	1	0	1	1	*	0	94	1	*	0	1	1
Wales (WA)	0	0	1	0	0	0	0	*	5	90	2	0
Republic of Ireland	*	0	*	0	*	4	2	*	0	0	*	0
Other parts of Europe	1	0	7	*	*	2	3	2	*	1	*	0
Outside of Europe	0	1	3	*	0	*	*	*	*	0	*	1
Other / Unsure	*	0	2	0	0	0	0	0	2	0	0	0
<i>Unweighted Bases</i>	232	202	443	206	271	226	233	283	201	202	306	200

Q40

Travel to site

Location of current workplace in relation to the location of workers' current homes

Approaching three quarters (73%) of construction workers in London were interviewed on a site that was located within the same region/nation as their permanent home, up from 63% in 2018/19 and in line with 2015 (71%). This is lower than the average across all regions of 85%.

Of the 27% who travel outside of their region to their current site, almost all (25%) are from a neighbouring region, as is the pattern for most other regions.

Furthest distance worked in last 12 months

All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months.

Close to half (47%) of construction workers in London have worked no further than 20 miles away from their home, up on the 36% who had done so in 2018/19, and significantly higher than the UK average of 33%.

A further three in ten (28%) have worked between 21 and 50 miles away, in line with 2018/19 (28%) and somewhat lower than the UK average of 34%.

This leaves one in five (20%) who have worked more than 50 miles away, significantly lower than the UK average of 33%, including 6% who have worked over 100 miles away (as compared to 13% in 2018/19).

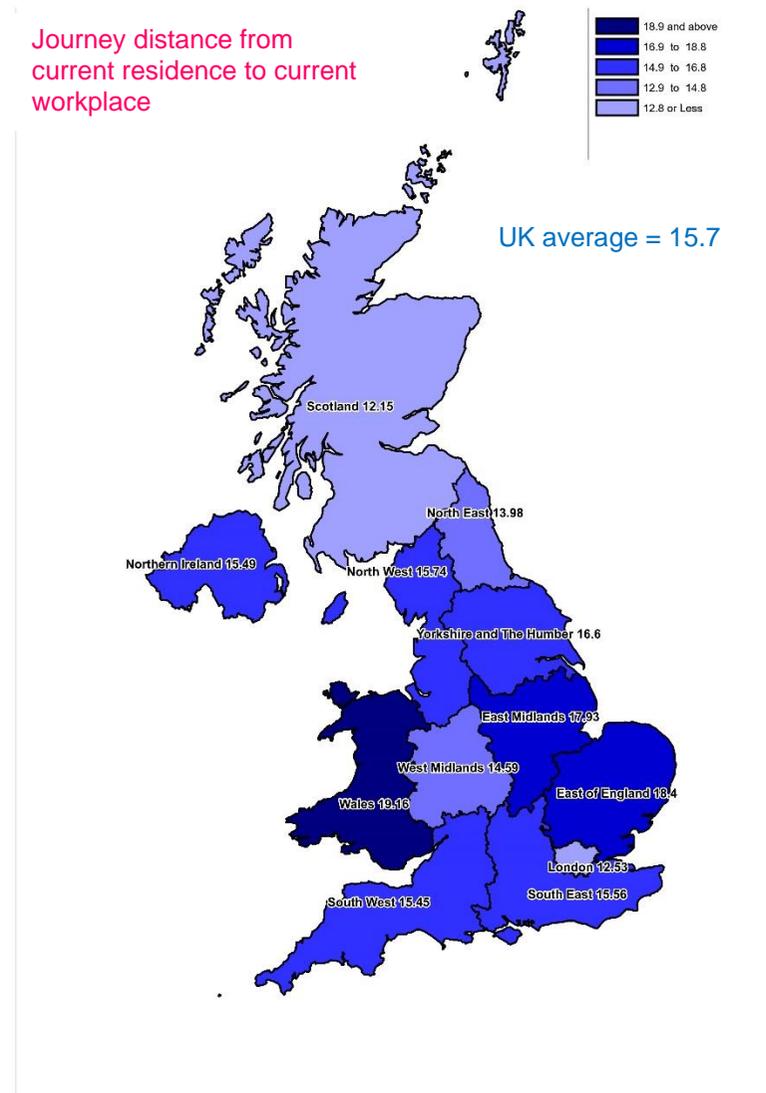
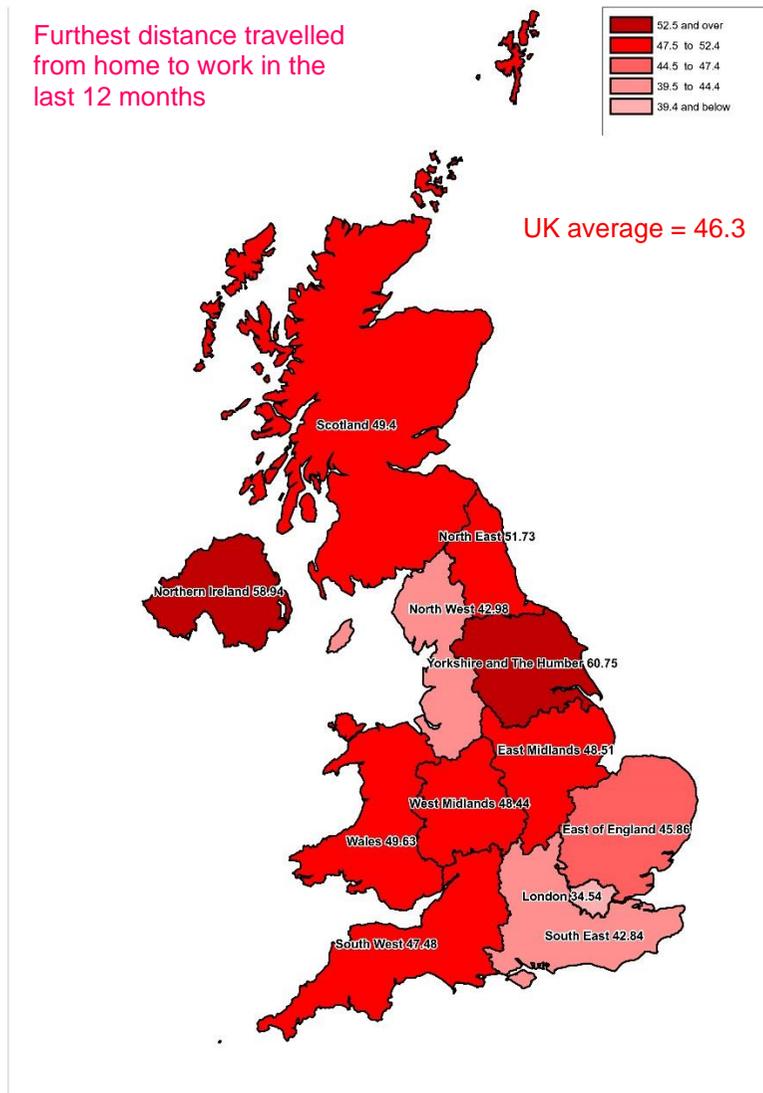
Consequently the average furthest distance travelled by construction workers in London is 35 miles, significantly lower than the UK average of 46, and the shortest distance of any nation/region.

Journey distance to work

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 13 miles, continuing a downward trend since 2015 (19 miles) and 2018/19 (16 miles), and a shorter distance than the UK average of 16 miles.

This downward trend is also reflected in the national picture, where the average distance is 16 miles, down on 18 miles in 2018/19, 22 miles in 2015 and 28 miles in 2012.

Over half (53%) of those providing a response travel less than 10 miles to work, in line with 2018/19 (49%), a third (34%) travel between 10 and 19 miles (compared to 22% in 2018/19), and 15% travel further than this (compared to 29% in 2018/19).



Use of temporary accommodation

One in ten (9%) construction workers in London report that they are currently staying in temporary accommodation while working at their site, in line with previous years (10% in 2018/19 and 8% in 2015). This is higher than the national average of 5%, and the highest of any nation/region.

One in five (19%) site managers are currently in temporary accommodation.

Expected site/phase duration

All the workers in London who are currently employed on a temporary basis (30% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 1% who expect to work for the rest of the week, 14% expecting another one to four weeks, 17% for one to six months, the same proportion (17%) for six to twelve months, and one in eight (12%) more than a year.

Two in five (39%) do not know how much longer they expect to be working, in line with 2018/19 (40%), and somewhat higher than the UK average (32%).

In order to get a measure of workplace stability amongst all construction workers, all respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase.

Overall, 13% of construction workers in London do not expect to work on that site for more than a month, in line with 2018/19 (14%) and the UK average (12%). Just 2% believe they will be there for less than a week, as was the case in 2018/19.

Half (51%) anticipate being on site for more than a month but less than a year, somewhat lower than the 58% who did so in 2018/19, but in line with the UK average of 53%.

One in seven (14%) expect to be on site for more than a year, in line with 2018/19 (16%), and with the UK average of 13%.

One in five (22%) are uncertain in this regard, higher than 2018/19 (11%), and in line with 2015 levels (22%), and in line with the UK average of 22%.

Those employed directly are more likely than average to expect to work on that site for six to twelve months (31%), while agency staff are more likely than average to expect to work for less than a month (25%).

Electricians are more likely than average to expect to work for six to twelve months at that site (37%).

Figure 36: Length of time workers expect to work at that specific site during current phase*Base: All respondents*

	London 2022 %	London 2018/19 %	UK 2022 %
Less than a week	2	2	2
1-2 weeks	5	3	3
2-3 weeks	2	7	3
3-4 weeks	4	1	4
1-3 months	10	12	11
3-6 months	18	22	17
6-12 months	23	24	25
More than a year	14	16	13
Don't know	22	11	22
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>3,005</i>

Q24

Expected next site location

While a majority (72%) of all construction workers in London are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis, this represents a decline on this measure since 2018/19 (89%) and is more in line with 2015 (71%), and the UK average (69%).

The proportion who are sure that this will not be the case has remained stable (4% compared to 3% in 2018/19), while the proportion who say it depends where the work is has increased, from 3% in 2018/19 to 20% in the latest survey, as is the case across the UK overall (from 8% in 2018/19 to 20% in 2022).

The remaining 9% do not know.

Sub-sector and sector mobility

This final section of the report explores sub-sector mobility (movement between project types within the construction sector) and how this varies between different groups of construction workers. Attitudes towards future employment in the sector are also examined.

Sub-sector mobility

All workers were asked which (if any) of six types of construction work they have undertaken for a continuous period of at least 3 months.

Following peaks in 2018/19, the profile of construction work undertaken in London has returned more to 2015 levels.

While new housing (60%), commercial work (42%) and housing repair and maintenance (40%) remain the most common types of work undertaken in London, this is to a significantly lesser extent than was the case in 2018/19 (67%, 62% and 47% respectively).

There have also been decreases in the extent to which all other types of construction work are undertaken in London, but particularly in relation to public non-housing work (from 55% to 27%) and infrastructure building projects (from 37% to 19%).

This places London below the UK average in relation to new housing (60% compared to 78%), private industrial work (28% compared to 35%), public non-housing work (27% compared to 32%) and infrastructure building projects (19% compared to 23%).

As a result of these decreases, there has been a significant increase in the proportion of construction workers in London who have worked on only one type of project, from 28% to 50% in the latest survey, returning this to 2015 levels (51%). This is higher than the UK average of 42%.

The likelihood that workers have worked only on one project type declines as age increases, as one would expect (from 70% of 16 to 24 year olds to 34% of 45+ year olds).

Correspondingly, the likelihood that workers have worked on five or six project types increases with age (from none of those aged 16 to 24, to 27% of those aged 45 or over).

Figure 37: Type of projects on which workers have spent significant periods of time
Base: All respondents

	London 2022 %	London 2018/19 %	London 2015 %	London 2012 %	UK 2022 %
New housing	60	67	73	66	78
Commercial work such as shops, office, pubs etc	42	62	36	39	39
Housing repair and maintenance including extensions/loft conversions	40	47	29	36	42
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	28	46	26	34	35
Public non-housing work such as schools, sports facilities, landscaping	27	55	31	37	32
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	19	37	25	35	23
Off-site manufacturing	5	-	-	-	6
ONE TYPE ONLY	50	28	51	37	42
TWO TYPES	17	16	16	23	17
THREE TYPES	12	13	8	12	13
FOUR TYPES	6	13	8	12	9
FIVE TYPES	8	14	8	7	9
SIX TYPES	6	16	7	7	6
<i>Unweighted bases</i>	<i>443</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>3,005</i>

Q4

Leaving the sector

In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction.

Around four in five (79%) construction workers in London think it is likely that they will still want to do so, including 39% who say they definitely will be, and 29% who think it is very likely. This is in line with the UK average of 82%.

Around one in ten (8%) say it is unlikely that they will still want to work in construction in five years' time (compared with a UK average of 7%).

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 11% of construction workers aged 45 and over.

Figure 38: Likelihood of construction workers still wanting to be working in the construction sector in five years' time

Base: All respondents

	All %	Age %			
		16 - 19	20 - 24	25 - 44	45+
Definitely will be	39	37	31	41	42
Very likely	29	11	27	32	27
Quite likely	11	32	23	9	8
Quite unlikely	3	5	6	4	1
Very unlikely	3	0	6	3	2
Definitely will not be	2	0	4	2	1
Hope to be retired	3	0	0	1	11
Don't know	10	16	2	9	9
<i>Unweighted bases</i>	<i>443</i>	<i>19*</i>	<i>48*</i>	<i>255</i>	<i>103</i>

Q38A

* Caution: low base

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 40% believe they will definitely want to be working in the construction sector, 30% believe it is very likely they will want to be working in the construction sector, and 12% believe it is quite likely they will want to be working in the construction sector.

Overall, 82% of this group are likely to some degree to want to be working in the sector, in line with the 85% who did so in 2018/19. Just 8% of this age group think it unlikely they will want to be working in the construction sector in five years (compared with 5% in 2018/19).

London construction workforce 2022 summary

The UK construction industry

Across the UK, the survey findings point us towards the conclusion that the construction industry is not in a particularly dynamic phase.

Following the sharp dip in industry output in value terms during the worst months of the Covid pandemic, there was a very sharp recovery from April to June 2021 followed by more steady growth to a point where output is broadly at its pre-pandemic level. Low growth is anticipated in the near future, with a relatively high rate of inflation and increases in the base interest rate likely to increase costs and dampen demand.

Correspondingly, the industry's workforce which suffered minor decline in 2020/2021 is also anticipated to be fairly static in aggregate with the major labour and skills driver being a need to recruit around 200,000 new workers per year as a result of an industry 'churn rate', estimated at around 8% of a 2.6 million total workforce, rather than substantial change in the total workforce (*The Skills Construction Needs*, Construction Skills Network, CITB, January, 2023).

Stability within the construction industry in London

However, a substantial proportion of industry workers, as surveyed here, have been in the industry for lengthy periods. Across the UK around 70% of workers have worked in the industry for 5 years or more (65% within London), and this reflects findings from previous surveys. Demographic and other characteristics of the workforce therefore change little overall, and with only 11% of workers (also 11% in London) expecting to leave construction in the next 5 years, changes to the demography of the workforce can occur only at the margin. A doubling of the percentage of female or ethnic minority entrants would have only a minor effect on the overall structure of the workforce.

The structure of the workforce remains – and is set to remain in the near future - very substantially white and male in its composition, particularly as, in this case, the 'workforce' was defined as comprising on-site and predominantly manual staffing, largely excluding clerical, administrative, technical, and professional construction occupations in which women, particularly, are more strongly represented.

The occupational profile of the workforce as identified by the survey also remains unchanged from previous years with labourers, bricklayers, site managers, carpenters, and plant operators remaining most frequent followed by much lower levels of representation of other industry trades.

Where survey respondents reported that they had changed roles within the industry, the distribution of prior occupations broadly reflects the current distribution of occupations in the workforce as a whole. Aspirations to a different future occupation are infrequent, as

only 7% of workers across the UK want to change their occupation, although this proportion is higher in London (12%).

Some indicators of change

Across the UK a further area of observed stability includes broad measures of qualification and training. For example, around seven in ten workers hold a construction-related qualification, 13% are working towards a qualification and 33% have had supervisory or management training. All these figures are broadly similar to those observed in 2018/19. Within London, however, workers are significantly more likely than the UK average to be working towards a qualification (23%), and to have received supervisory or management training (42%), suggesting some forward progress there.

There appears to be greater reticence in taking on more responsibility this year than previously, with fewer respondents certain they want to become a supervisor or manager in the future (23% across the UK; 33% in London, compared with 30% and 41% respectively in 2018/19), and fewer workers than in 2018/19 have had formal training in managerial or supervisory knowledge or skills (28% across the UK; 42% in London, compared with 35% and 46% respectively in 2018/19), reflecting their lower level of interest this year in moving into management and supervisory posts, or perhaps lower levels of interest in these roles are due to less formal training being offered in this area?

While the proportion of workers holding industry Skills Cards is still high, it has fallen somewhat since 2018/19, from 97% to 93% (98% to 92% in London over this period). Across the UK, there has been a pronounced reduction in Skills Cards amongst younger workers in their first two years in the industry.

Overall, a higher proportion of construction workers in London in 2022 than in 2018/19 held construction-related qualifications prior to starting their first job in construction, with more than two fifths (43%) of construction workers in London reporting having no construction-related qualifications when they started their first job, compared with 70% in 2018/19, and 83% in 2015.

At the time of interviewing, seven in ten (70%) construction workers in London reported holding a construction-related qualification, which is a slight decrease on the 74% who did so in 2018/19.

Since 2015 and 2018/19 surveys, within London (as across the UK) the proportion of direct employees in the workforces has decreased (from 47% in 2018/19 to 38% in 2022) while self-employment, always strong in the sector, has increased (43% in 2018/19, 51% in 2022). There is little change in the level of agency employment. The increase in self-employment is likely to positively impact both employers - enabling increased flexibility and cost control – and workers - increased independence, but may also have a negative impact, with greater uncertainty and insecurity in the industry for workers. Potentially, this change may result in lower levels of employer-led training, and attention to improving the skills of the workforce.

Another area of change identified by the survey concerns working hours. The proportion of workers working more than 50 hours per week has decreased somewhat since 2018/19, from 39% to 33% in London (24% to 19% across the UK), although it remains particularly high in London compared with elsewhere. The change raises interesting questions as to whether some technological changes are permitting fewer but more productive hours for some workers; or whether workforce culture, in line with general trends since Covid, is disposing some workers to put personal time ahead of overtime hours; or, simply, whether demand pressures in the industry are lower.

Focus on how London differs from the UK average

Compared with the construction workforce across the UK as a whole, London stands out in several respects:

- London has a younger workforce within construction than the UK average, with 50% aged under 35 (45% across the UK)
- Although the proportion of the London population that represent an ethnic minority group has increased over time, and is at the highest level of any region/nation, at 19%, it is significantly below the proportion of the wider London population (41%).
- More construction workers in London originate from outside (59%) than inside the UK (41%) (as compared to 17% and 83% respectively across the UK). Half of this group are from EU countries, and half are from non-EU countries. Consequently, workers in London are more likely than the UK as a whole to have come from another country (55% compared to 19%).
- At 37%, the proportion of construction workers in London who perform a supervisory or management role on their site has increased, and is higher than the UK average of 28%.
- London's construction workforce has more self-employed staff than the UK average (51% compared to 42%).
- London has the highest proportion of workers who work for 50 or more hours a week (33% compared to 19%).
- London has a lower proportion of construction workers who have worked in the industry for more than 20 years than the UK average (19% compared to 30%), and fewer who have worked in the industry pretty much continuously (54% compared to 61%). However, workers in London are more likely than the UK average to have worked in different roles or occupations whilst working in the industry (44% compared to 35%).
- While seven in ten (71%) construction workers in London would like to carry on in the same trade or occupation, this is lower than the UK average of 80%. At 15%, the proportion who would like to leave the industry is the highest of any region/nation.

- Workers in London are significantly more likely than the UK average to feel they need training in basic skills; close to half (44%) identify such a need, as compared to an average of 19%. Speaking English (29% compared to a UK average of 9%), reading (21% compared to a UK average of 9%) and writing (17% compared to a UK average of 7%) are the skills prioritised by workers in London.
- Overall, a quarter (23%) of construction workers in London are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications), significantly higher than the UK average of 13%, and higher than any other region/nation.
- Amongst workers in London who do not currently perform supervisory/management roles and have not had this role before, a third (33%) want to become a supervisor or manager in the future, significantly higher than the UK average of 17%.
- While the proportion who grew up in London has increased from 16% in 2018/19 to 24% in the latest survey, this is significantly lower than the UK average of 46%. In contrast, construction workers in London are more likely than average to be working in London for family reasons (9% compared to 5%), because there are more jobs available (8% compared to 3%), or because they liked the area (4% compared to 1%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 13 miles, a significantly shorter distance than the UK average of 16 miles.
- One in ten (9%) construction workers in London report that they are currently staying in temporary accommodation while working at their site. This is higher than the national average of 5%, and the highest of any nation/region.
- In terms of the type of construction work undertaken, London sits below the UK average in relation to new housing (60% compared to 78%), private industrial work (28% compared to 35%), public non-housing work (27% compared to 32%) and infrastructure building projects (19% compared to 23%).

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