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# Workforce Mobility and Skills in the UK Construction Sector 2022

UK-wide Report - May 2023

Study prepared by BMG Research from a commission by CITB.

The views expressed by research participants are their own and do not necessarily represent those of their employers.

**Author: BMG Research**

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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 2018/2019, 2015, 2012, 2007, and 2005. Face-to-face interviews and a small number of paper surveys were conducted with 3,005 construction workers undertaking manual roles on sites across the UK.

## Profile of the sample

All but 3% of construction workers are male. Around half of construction workers interviewed in the survey are aged 34 and under (45%), which is a higher proportion than compared with the UK population as a whole (36%). Just 6% of construction workers are aged 60 or over.

Overall, 7% of the workforce represents an ethnic minority group, compared with a higher incidence of 14% in the UK 16 to 64 population as a whole. By region/nation London has the highest proportion of workers from an ethnic minority group (19%), but this compares to an incidence of 41%.

One in six construction workers (17%) originate from another country and this proportion increases to over 1 in 2 (59%) in London.

While 80% of construction workers have lived in the UK all of their lives, the majority of the remainder (a further 14%) have lived in the UK for more than 5 years.

By trade/occupation, the highest proportion of the sample is accounted for by labourers/general operatives (18%), followed by bricklayers (10%) and then site managers, carpenters/joiners and plant/machine operatives (all 9%).

Three in ten (28%) of those interviewed perform a supervisory or management role on their site (compared to 30% in 2018/19, 25% in 2015 and 17% in 2012).

Around half (48%) of construction workers interviewed for the survey are employed directly by a company, in line with 2018/19 (49%), and again lower than reported in 2015 (54%). The proportion of self-employed workers has remained stable (42%, compared to 43% in 2018/19). The proportion of workers working for an agency has continued an upward trend since 2015, with 9% employed in this way, compared to 7% in 2018/19 and 6% in 2015. Workers from an ethnic minority group are significantly more likely than workers of a white ethnic origin to work for an employment agency (23% compared to 8%). By region/nation the proportion of workers employed directly varies from 73% in Scotland, down to just 37% in Yorkshire and Humber.

Close to three in ten (29%) of all construction workers are employed on a temporary, rather than permanent basis. By region/nation the proportion of construction workers working on a temporary basis is highest in Northern Ireland (43%) and lowest in Scotland (21%) and the South West (22%).

Three in five (59%) of construction workers work between 40 and 49 hours per week, while nearly one in five work more than 50 hours per week (19%). In London the proportion that work 50+ hours per week increases to a third (33%).

## Work history

### Time in the sector

Three I ten (30%) of all construction workers have worked in the industry for at least 20 years and a total of more than half have done so for 10+ years (52%).

Three quarters (75%) construction workers have worked solely within the construction industry, including 61% who have done so pretty much continuously, without spells out of work.

### Previous non-construction jobs

Around 1 in 5 (18%) construction workers worked in another sector *before* starting work in construction, and among this group the sectors worked in beforehand are most likely to be the wholesale and retail sector (20%), followed by accommodation, which has seen an uplift since 2018/19 (12% compared to 2%), and manufacturing, which has seen a downturn since 2018/19 (11% compared to 45%).

In terms of the job roles that construction workers previously held in other sectors, the highest proportion were in skilled trade occupations and elementary administration and service occupations (both 22%), with the latter showing a significant uplift since 2018/19 (2%).

### Occupational switching within the construction sector

Just over a third (35%) of all construction workers have worked in more than one construction trade or occupation whilst working in the construction industry.

Workers are most likely to have previously worked as a labourer/general operative (36%), while 14% have previously worked as a carpenter/joiner, 11% have worked as a bricklayer, and 9% have worked as a plant/machine operative.

Thinking about their future plans in the construction sector, over four in five (82%) say they are likely to still want to be working in the construction sector in five years' time. Four in five (80%) workers would like to carry on in the same trade or occupation, while 7% would like to change their trade/occupation and 5% would like to leave the construction altogether.

By region/nation, construction workers within London are most likely to want to change trade/occupation (12%), followed by workers in Scotland, the South East and Wales (all 8%). By occupation those working as labourers/general operatives (14%) are most likely to want to change trade/occupation.

The most popular occupation that workers would like to change to is site manager (25% of those who would like to change).

Two in three (66%) of construction workers who would like to change trade or occupation believe they will require further training or qualifications in order to do this other kind of work, a lower proportion than was the case in 2018/19 (87%) and in 2015 (77%).

The most frequently cited reason for wanting to change trade or occupation is the expectation that they will be better paid (65%, compared to 69% in 2018/19 and 59% in 2015). Over two-fifths wanted to use their skills/abilities better (43%), while over a quarter (27%) believe it will mean more interesting work.

## Qualifications and skills

### Skills cards/certificates

The majority (93%) of all construction workers hold some form of construction skill card or certificate, although this is lower than the 97% wo did so in 2018/19. Almost all workers in the South West, Northern Ireland and the North East report having a card (all 97%), with levels for other regions in line with the average. The most notable decreases in card-holding are in the West Midlands and Scotland, at 91% in both instances, and down from 99% in both instances since 2018/19.

Younger workers (83% of 16-19 year olds) and those who have worked in construction for less than two years (80%) are less likely to hold a skill card/certificate, but there is little difference between workers across older age groups and with differing lengths of experience (of over a year) in the propensity to hold a skill card or certificate.

In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (93%), and in Northern Ireland most (96%) hold the CSR card/certificate, significantly up on the 85% who did so in 2018/19 and 70% in 2015.

### Construction-specific qualifications

Overall, less than half (47%) now say they had no formal qualifications when they first started working in the construction industry, a significant downturn on the 72% who did so in 2018/19 and the 75% who did so in 2015.

The proportion who say they had no formal qualifications when they first started working in the construction industry remains higher amongst older workers (58% of 55+ year olds cf. 48% of 16-24 year olds).

By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst steel erectors/riggers (64%), labourers/general operatives (59%), scaffolders (58%) and roofers (57%), and lowest among dryliners (29%), technicians (31%), electricians (35%), plumbers (36%), site managers (37%) and bricklayers (41%).

Having seen a large increase since 2019/19 and 2015, dryliners are now the most likely to hold construction specific qualifications (87% compared to 61% in 2018/19 and 63% in 2015). Other job roles with higher than average levels of construction specific qualifications are plumbers (87%), steel erectors/riggers (86%), scaffolders (82%), carpenters/joiners (79%), electricians (79%), bricklayers (78%) and site managers (77%).

As in previous years, the qualifications most likely to be held by construction workers are NVQ/SVQ qualifications, but to a greater extent than previously (69% compared to 58% in 2018/19 and 66% in 2015).

One in five (18%) construction workers with qualifications hold City & Guilds qualifications (compared to 14% in 2018/19 and 20% in 2015), whilst one in ten (11%) construction workers with qualifications now hold an apprenticeship (compared to 6% in 2018/19 and 13% in 2015).

## Basic skill needs

One in five (19%) workers believe they would benefit from some form of training in basic skills, returning this to the level seem in 2012 (20%) following a dip in 2015 (14%) and 2018/19 (11%). Although it should be noted that an additional category was added for the latest survey – digital skills – in which around one in twenty (4%) believe they need training. However, there has also been an increase in the proportion who feel they would benefit from training in reading, from 5% in 2018/19 to 9% in 2022, and in the proportion who feel they would benefit from training in speaking English, from 6% to 9%.

Workers in London are much more likely than average to feel they would benefit from training in basic skills (44% compared to 19%), and this is true across each skill, but particularly in relation to speaking English (29% compared to 9%). Workers in Wales are also more likely than average to identify a need for training overall (24%), particularly in relation to digital skills and maths (8% and 10% respectively). Workers in Northern Ireland are also more likely than average to identify a need for training in digital skills (12%) and maths (11%). By contrast, workers in the North East (6%, Scotland (6%), the North West (8%) and Yorkshire and Humber (10%) are less likely than average to identify the need for any such training.

## Current study for qualifications

One in eight of all construction workers (13%) are currently working towards any formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 15% in 2018/19, 12% in 2015 and 11% in 2012. As in previous surveys, the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (43% of 16 to 19 year olds and 24% of 20 to 24 year olds), although for the youngest age group – 16 to 19 year olds – this is to a lesser extent than was the case in 2018/19 (55%) and previous years. Amongst workers with no qualifications, one in ten (11%) are currently working towards a qualification (16%).

Those in technical roles (26%), electricians (25%) and site managers (21%) are most likely to be working towards qualifications currently, as was the case in 2018/19, and labourers/general operatives (8%) and plant/machine operatives (7%) least likely.

### Supervisory/managerial training

Amongst those who do not currently perform supervisory/management roles, close to one in five (17%) want to become a supervisor or manager in the future but have not done it before, lower than the 24% who did so in 2018/19 and the 20% who did so in 2015. As in 2018/19 and 2015, a further 6% previously held the role and want to be a supervisor/manager. One in six (18%) of all construction workers not currently managers/supervisors are unsure as to whether they would like to be one in the future (compared to 20% in 2018/19), while three in five (59%) are certain that they do not want to be, an uplift on 51% in 2018/19.

A third of all respondents (33%, compared to 34% in 2018/19 and 25% in 2015) and four-in five of those who have had some form of supervisory or management responsibilities (80%, compared to 81% in 2018/19, 73% in 2015 and 71% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned by those who have undertaken any training (43%), followed by Site Safety Supervisors Courses (31%) and in-house training (24%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

### Overall skill levels

As in previous years, the vast majority of construction workers (96%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 4% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. A fifth of the workforce (19%) holds a skill card/certificate, but has no other construction qualification, which continues a downward trend since 2015 (30%) and 2018/19 (22%). At 13%, the proportion of construction workers that are working towards a construction qualification is largely in line with 2018/19 (15%) and 2015 (12%).

Overall, around three-fifths (61%) have qualifications equivalent to Level 2 or above (compared to 59% in 2018/19 and 58% in 2015).

## Geographic mobility

### Work history in the region/nation

Close to half (47%) say that the reason they are working in the region they are working in is because their employer sent them there (compared to 51% in 2018/19), and a similar proportion (46%) saying it was because they grew up there/have always lived there (compared to 43% in 2018/19).

Workers in Northern Ireland (92%), the North East (76%) and the South West (59%) are most likely to say they work in their current region/nation because they have always lived there/grew up there, compared with 24% of those based in London, 33% of those based in the East Midlands, and 38% of those in Wales. With regard to being sent by their employer, this is particularly prevalent among those based in the North West (68%), Wales (55%) and the West Midlands (54%). Those based in London are more likely to mention other reasons, such as better pay (11%), family reasons (9%), availability of jobs (8%) and a better quality of life (4%).

There has been an increase in the proportion of workers who have worked within their current region for their entire career, from 44% in 2018/19 and 2015, to 49% in 2022, and a corresponding decrease in the proportion who have only spent a small proportion of their time in their current region, from 10% in 2018/19 to 5% in 2022.

Consequently, in 2022, a greater majority (83%) have spent all or most of their career in their current region than has been the case previously (77% in 2018/19, 80% in 2015 and 69% in 2012). Those based in Scotland (76%) and Wales (61%) most likely to say they have spent all their time in this current region/nation, as was the case in 2018/19. However there have been some shifts since 2018/19, with increases in the East of England (from 27% to 50%), the South East (from 32% to 47%) and the West Midlands (from 36% to 45%), and decreases in Northern Ireland (from 57% to 38%), the North West (from 55% to 46%) and the North East (48% to 38%)

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. Workers in Scotland (98%), followed by those in the North East (87%), Northern Ireland (85%), the South West (84%), Wales (84%) and London (81%) are more likely than those in other regions to report their last site was in the same nation/region as they are working in now. Those in the East Midlands are less likely to report this is the case (51%), with over one in ten of these workers having come from Yorkshire and Humber (15%) and the West Midlands (13%).

### Worker origins

Overall, nearly three-quarters of all construction workers were interviewed in the same region/nation in which they were living when they started their construction career (74% compared to 72% in 2018/19, 75% in 2015 and 66% in 2012). There are, however, considerable variations in the extent to which workers have remained in their original locality. Nine in ten or more workers currently based in Scotland (96%), Northern Ireland (95%) and Wales (93%) have remained in the same region/nation in which they were based when they started their construction careers, and this is also true for close to nine in ten of those in the North West (89%). The proportion for whom this is the case is lowest in the East Midlands, where over one in ten were based in Yorkshire and Humber (15%) and the West Midlands (13%).

## Travel to site

A third (33%) of all construction workers have worked no more than 20 miles away in the last 12 months, a higher proportion than was the case previously (26% in 2018/19 and 20% in 2015). A further third (33%) have worked between 21 and 50 miles away, in line with previous years (32% in 2018/19 and 31% in 2015). This leaves a third (32%) that have worked more than 50 miles away from their permanent or current home, lower than the 41% in 2018/19 and 47% in 2015. Workers based in Yorkshire and Humber (25%) and Northern Ireland (21%) are most likely to have travelled more than 100 miles from their permanent home to work in the last 12 months.

Nationally, one in twenty (5%) construction workers reported that they were currently staying in temporary accommodation while working at their site, in line with previous years (5% in 2018/19, and 6% in 2015 and 2012). The proportion is highest amongst workers currently based in London (10%) and lowest in the Northern Ireland (1%). Construction workers from ethnic minority groups are more likely than White workers to be living in temporary accommodation (12% compared to 4%).

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 17 miles, continuing the downward trend since the survey began (18 miles in 2018/19, 22 miles in 2015 and 28 miles in 2012).

### Site duration and change

In nearly a third (32%) of cases temporary workers did not know how much longer they could expect to be working for their current company/agency, but this is down on the 38% in this situation in 2018/19.

When 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, over one in ten (12%) do not expect to work on that site for more than a month, which matches 2015 and 2012 levels following a peak in 2018/19 (14%). Half (53%) of all workers anticipate being on site for more than a month but less than a year (in line with 51% in 2018/19), and more than one in ten (13%) expect to stay on that site for a year or longer, down on the 18% who did so in 2018/19, and the 26% who did so in 2015, and more in line with the proportion who did so in 2012 (15%). More workers in 2022 are not sure how much longer they could expect to be on site (22% compared to 16% in 2018/19, 24% in 2015 and 20% in 2012). By region/nation, workers in Scotland and the North West (both 30%) are most likely to be unsure of how much longer they will be working at that site, while workers in Northern Ireland (2%) and Wales (14%) least likely to be unsure.

While a majority (69%) of all construction workers 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 is significantly lower than the 84% who did so in 2018/19, and reverses an upward trend on this measure since 2015, returning to the level seen in 2012 (69%).

However, the proportion who are sure that this will not be the case has remained stable (5% compared to 4% in 2018/19), with an increase in those who say it depends where the work is, from 8% in 2018/19 to 20% in 2022. The remaining 6% do not know.

## Sub-sector and sector mobility

### Sub-sector mobility

New housing continues to be the most common type of construction work undertaken, by 78% (compared to 79% in 2018/19), followed by housing repair and maintenance (42% compared to 46% in 2018/19). At 39%, commercial work has fallen back to 2015 levels (35%) following an uplift in 2018/19 (51%).

Private industrial work such as factories, warehousing, mechanical engineering, land reclamation (35%), public non-housing work such as schools, sports facilities, landscaping (32%) and infrastructure building projects (23%) have all seen declines since 2018/19 (45%, 51% and 31% respectively), placing them more in line with the 2015 results (30%, 33% and 21% respectively).

Reflecting these results, there has been an increase in the proportion of workers who have only worked in one type of construction, from 30% in 2018/19 to 42% this year, again more in line with 2015 (48%).

The number of project types worked on varies significantly by region/nation. More than half of workers in the East Midlands (53%) and half of those in London and Wales (both 50%) have only worked on one type, compared with 12% in Northern Ireland, and around three in ten in Scotland (27%), the North East (31%) and Yorkshire and Humber (33%).

### Leaving the sector

Over four in five (43%) believe they definitely will want to be working in construction in the next five years, a decline on the 48% who did so in 2018/19. A further quarter (27%, compared with 26% in 2018/19) believe it is very likely, and overall, 82% believe it is likely to some degree, somewhat lower than 2018/19 (86%). Under one in ten construction workers consider it unlikely (7%), with just 2% saying they definitely will not be and a further 4% hoping to be retired by then.  One in twenty (6%) do not know.

Among those unlikely to be in construction in five years' time, working in a less physical job (29%), more suitable hours (23%) and being able to work closer to home (22%) are the key reasons.

# 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.

## 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.

### 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.

## 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

As in previous years of the survey, the vast majority of construction workers in manual roles interviewed were male (97%, 98% in 2018/19 and 99% in 2015). Male dominance is greater in the survey sample than in the UK construction 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 2018/19 and 2015 and the Annual Population Survey**

*Base: All respondents*

| | **2022 %** | **2018/9 %** | **2015 %** | **UK Workforce* %** |
|---|---|---|---|---|
| Male | 97 | 98 | 99 | 52 |
| Female | 2 | 1 | <0.5 | 48 |
| Transgender | <0.5 | <0.5 | - | - |
| Non-binary | <0.5 | <0.5 | - | - |
| Prefer not to say | <0.5 | <0.5 | <0.5 | - |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *33,808,600* |

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

## Age

The youngest age group (16 to 24 year olds) account for around 1 in 5 construction workers (19%), those in middle years (25 to 44 years) comprise around half (53%), whilst those aged 45 or older account for the remaining 28%. The following figure shows more detailed proportions. Allowing for some natural sampling variation, the table also shows that the proportions are largely very similar to those observed in previous surveys.

Compared with the UK workforce overall, a higher proportion of construction workers are aged under 35 years (45% cf. 36% of economically active adults across the UK). This may reflect the fact that construction workers in manual roles, as in this survey, are more likely to seek alternative employment in later years due to the physically arduous nature of some of these roles.

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

*Base: All respondents*

<table>
<tr><th></th><th>2022<br>%</th><th>2018/9<br>%</th><th>2015<br>%</th><th>2012<br>%</th><th></th><th>UK Workforce*<br>%</th></tr>
<tr><td>16 to 19 years</td><td>6</td><td>5</td><td>5</td><td>4</td><td>16 to 19 years</td><td>4</td></tr>
<tr><td>20 to 24 years</td><td>13</td><td>12</td><td>13</td><td>15</td><td>20 to 24 years</td><td>9</td></tr>
<tr><td>25 to 34 years</td><td>26</td><td>28</td><td>29</td><td>29</td><td>25 to 34 years</td><td>23</td></tr>
<tr><td>35 to 44 years</td><td>24</td><td>23</td><td>22</td><td>24</td><td>35 to 49 years</td><td>33</td></tr>
<tr><td>45 to 54 years</td><td>17</td><td>20</td><td>20</td><td>18</td><td rowspan="2">50 to 64 years</td><td rowspan="2">28</td></tr>
<tr><td>55 to 59 years</td><td>8</td><td>7</td><td>6</td><td rowspan="2">10</td></tr>
<tr><td>60+ years</td><td>6</td><td>4</td><td>4</td><td>65+ years</td><td>4</td></tr>
<tr><td>Unweighted bases</td><td>3,005</td><td>4,048</td><td>4,771</td><td>4,933</td><td></td><td>33,808,600</td></tr>
</table>

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

### Ethnicity

In terms of ethnicity, while at lower levels than previous surveys, the vast majority of construction workers continue to be of White origin (91% compared to 94% in 2018/19). The decrease is mainly a result of an increase in the proportion not offering a response to this question, rather than increased proportions of respondents from ethnic minority groups. Thus, workers of Black (2%) and Asian (2%) and Mixed ethnic origin (1%) make up the same proportion of the sample as in 2018/19. Compared with the UK population as a whole (aged 16-64) a higher proportion of construction workers are of White origin (91% cf. 84% amongst the UK population).

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

*Base: All respondents*

| | 2022<br>% | 2018/9<br>% | 2015<br>% | 2012<br>% | UK Population aged 16-64*<br>% |
|---|---|---|---|---|---|
| White | 91 | 94 | 94 | 95 | 84 |
| Black | 2 | 2 | 2 | 2 | 4 |
| Asian | 2 | 2 | 1 | 1 | 6 |
| Mixed | 1 | 1 | - | - | 2 |
| Other/Not stated | 3 | 1 | 3 | 1 | 4 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *4,933* | *41,439,500* |

*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.

Overall, 7% of construction workers across the UK sample represent an ethnic minority group[1], compared with a higher incidence of 14% across the UK population. By region/nation, as in the population overall, the highest incidence of construction workers of ethnic origin is in London (19%, as compared to 15% in 2018/19 and 2015). The South East accounts for the next highest proportion of construction workers of ethnic origin (11%), followed by the West Midlands (7%). Only in the South East does the proportion of construction workers from ethnic minority groups match the ethnic minority population in the region (11% compared to 12%).

The proportion that represents ethnic minority groups has risen overall since 2012, most markedly in London and the South East. The reason for this can only be speculative but may include increased receptiveness in the industry to non-white employment, increased interest in construction careers amongst ethnic minority individuals, and continuing immigration into the UK.

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

*Base: All respondents*

| | **2022** % | **2018/9** % | **2015** % | **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 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *4,933* | *41,439,500* |

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

[1] This figure, of 7%, apparently contradicts the implied proportion from ethnic minority groups of 5% in the previous figure. The difference is due rounding effects applied to many sub-categories used to identify ethnicity in the survey questionnaire when those categories are combined. The best estimate of the workforce ethnic minority proportion is the combined 7% rather than the 5% implied in Figure 4.

## 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 (83%) originated from the UK and the remaining 17% originated from another country. Again, in line with 2018/19, no more than 1% of construction workers originate from a single specified country, with the exception of Romania, from which 5% of construction workers originate (increasing to 19% in London, as compared to 15% in 2018/19, and 8% in the East of England, as compared to 10% in 2018/19).

The prevalence of construction workers from Albania peaks in London (5%), while the prevalence of construction workers from Lithuania peaks in the East of England (5%).

One in ten construction workers continue to originate from an EU country (9% compared to 10% in 2018/19), peaking at 30% in London (compared to 31% in 2018/19), followed by the East of England (16% compared to 18% in 2018/19).

**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 continues to be a higher-than-average proportion of construction workers from EU countries among dryliners (29% from the EU compared to an average of 9% from the EU for all trades) to an even greater extent than was the case in 2018/19 (19%).

Construction workers from non-EU countries are also particularly prevalent among dryliners (14%), and among those in a technical role (15%).

Around one in six agency (15%) and self-employed (14%) construction workers originate from EU countries, compared with just 5% of directly-employed workers who are from the EU.

One in eight agency construction workers (13%) are from non-EU countries, meaning that, when the 15% of agency workers from the EU is added, over a quarter (28%) of agency construction workers are from outside the UK, as compared to 10% of those employed directly, and 22% of those who are self-employed.

### Holding of passports

Close to four in five (78%) construction workers hold a UK passport, down on the 89% who did so in 2018/19. This is largely driven by an increase following Brexit in the proportion of those in Northern Ireland who hold a passport for another country (presumably mainly nationals of the Irish Republic working in Northern Ireland) from 30% to 48%.

One in eight construction workers (13%, compared to 14% in 2018/19) hold a passport for another country. This increases to 39% of construction workers in London (compared to 38% in 2018/19), and 18% in the East of England, down on the 24% who did so in 2018/19.

Close to one in ten (7%) do not have a passport (compared to 5% in 2018/19).

Of those construction workers that were born outside of the UK or have a non-UK passport, 7% have dual citizenship, 62% have settled status, 16% have pre-settled status and 5% have a sponsored Visa.

### Length of time living in the UK

In line with 2018/19, four-fifths (80%) of construction workers have lived in the UK all of their life, but this proportion continues to vary greatly by region/nation, from virtually all in the North East (96%), the North West (93%) and in Scotland and Wales (both 92%), down to two in five (39%) in London, significantly lower than the 50% seen in 2018/19.

Around three quarters of construction workers in the East of England (74%) and the South East (74%) have lived in the UK all of their life (compared to 71% and 73% in 2018/19).

The majority of the remainder (14% of all construction workers, in line with 2018/19) have lived in the UK for more than 5 years. This is the case across all regions/nations, although a higher than average proportion of construction workers who have lived in the UK for less than 5 years are to be found in London (16% compared to 17% in 2018/19, and 6% across the UK as a whole).

**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, 3% report that they have a long term illness, health problem, or disability which limits the type of work they can do. This is the same proportion as in 2018/19. The most common illness/disability amongst these workers (affecting 4 out 0f 10 of those with a disability or long-term illness) is a reduced physical capacity including variously inability to lift, carry or otherwise move everyday objects, debilitating pain, lack of strength, breath, energy or stamina, asthma, angina, and diabetes. Other problems mentioned in significant numbers included hearing problems and Covid after-effects.

## 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.

As in the 2018/19 and 2015 surveys, labourers/general operatives account for the highest proportion of construction workers, (18% compared to 16% in 2018/19 and 18% in 2015). Bricklayers account for the next highest proportion of workers (10%, compared to 11% in 2019/19 and 15% in 2015). Site managers, carpenters/joiners and plant/machine operatives each account for around one in ten of all construction workers (all 9%).

**Figure 8: Occupational profile**

*Base: All respondents. Mentions 1%+*

| | **2022**<br>% | **2018/19**<br>% | **2015**<br>% |
|---|---|---|---|
| Labourer/General operative | 18 | 16 | 18 |
| Bricklayer | 10 | 11 | 15 |
| Site manager | 9 | 11 | 8 |
| Carpenter/joiner | 9 | 10 | 11 |
| Plant/machine operative (e.g. Fork lift/JCB) | 9 | 7 | 7 |
| Electrician | 5 | 6 | 5 |
| Ground worker | 5 | 4 | 4 |
| Plumber | 3 | 4 | 5 |
| Scaffolder | 3 | 4 | 4 |
| Technical e.g. surveyor, maintenance technician | 3 | 4 | 2 |
| Dryliner | 3 | 3 | 3 |
| Roofer | 3 | 2 | 2 |
| Banksman/Banksperson | 2 | 1 | 2 |
| Steel erector/rigger | 2 | 1 | 1 |
| Supervisor/foreman | 2 | 1 | 1 |
| Painter/decorator | 1 | 2 | 3 |
| Pipe fitter | 1 | 2 | 1 |
| Ceiling fixer | 1 | 1 | 1 |
| Plasterer | 1 | 1 | 2 |
| Project Manager | 1 | 1 | <0.5 |
| Floorer | 1 | <0.5 | <0.5 |
| *Unweighted bases* | *3,005* | *4048* | *4771* |

*Q5*

## Supervisory roles

Approaching three in ten (28%) construction workers interviewed for the 2022 survey say they perform a supervisory or management role on their site (compared to 30% in 2018/19, 25% in 2015 and 17% in 2012).

The incidence of workers in a supervisory role is significantly higher than average in Northern Ireland (40%) and London (37%).

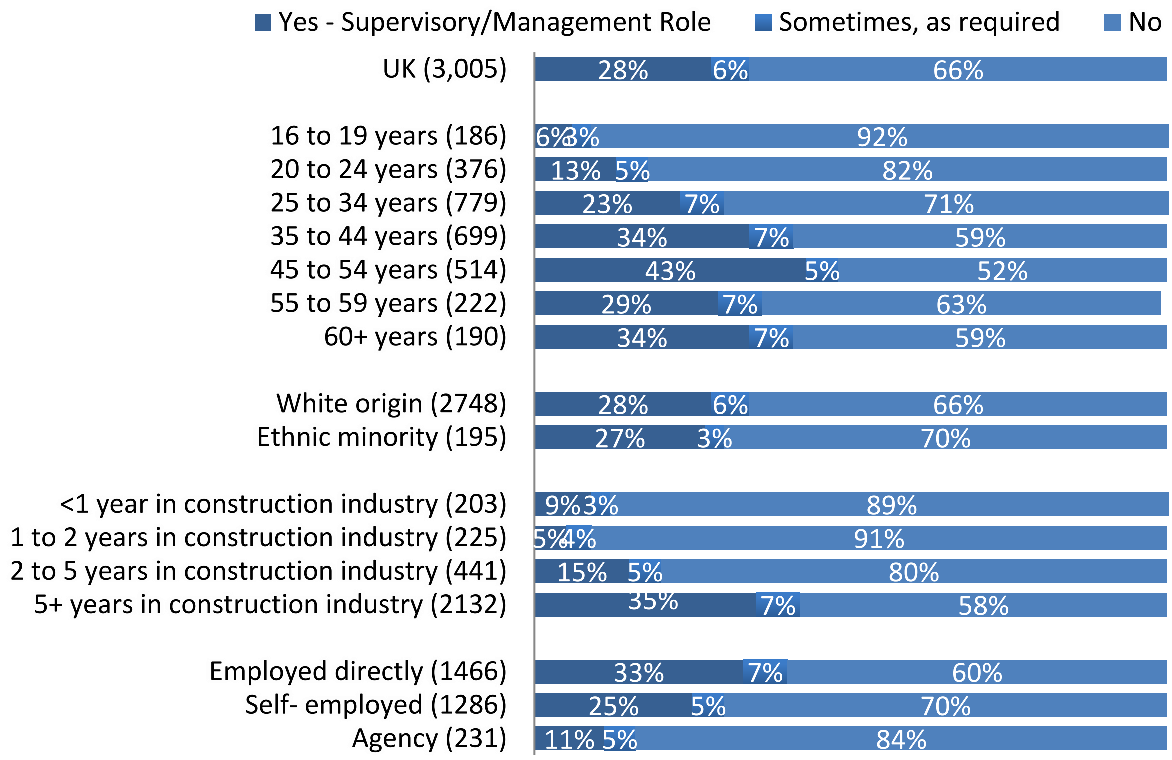
As was the case previously, the incidence of workers in a supervisory role increases with age, from 6% of 16 to 19 year olds, peaking at 43% among those aged 45 to 54, and then reducing to 34% among those aged 60 or over. Similarly, a higher proportion (35%) of those who have worked in the construction industry for more than 5 years have supervisory roles than those that have worked in the industry for less than 5 years (9% up to a year; 5% where 1 to 2 years; 15% where 2 to 5 years).

As 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 (33% compared to 5% and 11% respectively).

These differences are summarised in the following figure.

**Figure 9: Whether respondents perform a supervisory or management role**

*Base: All respondents*




*Q8. Unweighted bases in parentheses*

## Employment status

Around half (48%) of construction workers in this year's sample are directly employed by a company, which continues the downward trend since 2015, where the proportion was 54%.

The next highest proportion of construction workers are self-employed (42%) in line with 2018/19 (43%) and higher than 2015 (39%). The proportion of workers who are self-employed (45%) is higher amongst those that have worked in construction for more than 5 years than amongst those that have worked in the industry for less time.

While just one in ten (9%) of the sample is accounted for by construction workers who are working for an employment agency, this continues an upward trend since 2015, when 6% did so. The likelihood of working for an employment agency reduces with the length of time in the industry, from 19% of those in the industry for less than a year to 6% of those in the industry for five or more years.

This is summarised in the following figure.

**Figure 10: Employment status**

*Base: All respondents*

| | **2022** % | **2018/19** % | **2015** % | **Years working in construction %** | | | |
|---|---|---|---|---|---|---|---|
| | | | | <1 | 1-2 | 2-5 | 5+ |
| Employed directly by a company (contractor or sub-contractor) | 48 | 49 | 54 | 49 | 52 | 48 | 48 |
| Self-employed | 42 | 43 | 39 | 30 | 31 | 40 | 45 |
| Working for an employment agency | 9 | 7 | 6 | 19 | 15 | 11 | 6 |
| Working on some other basis | 1 | <0.5 | <0.5 | 2 | 2 | 1 | <0.5 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *203* | *121* | *441* | *2,132* |

*Q20*

Workers of White ethnic origin are significantly more likely than those of ethnic minority origin to be employed directly (50% compared with 35%), whilst workers from an ethnic minority group are significantly more likely to be working for an employment agency (23% compared with 8% of workers with White ethnic origins).

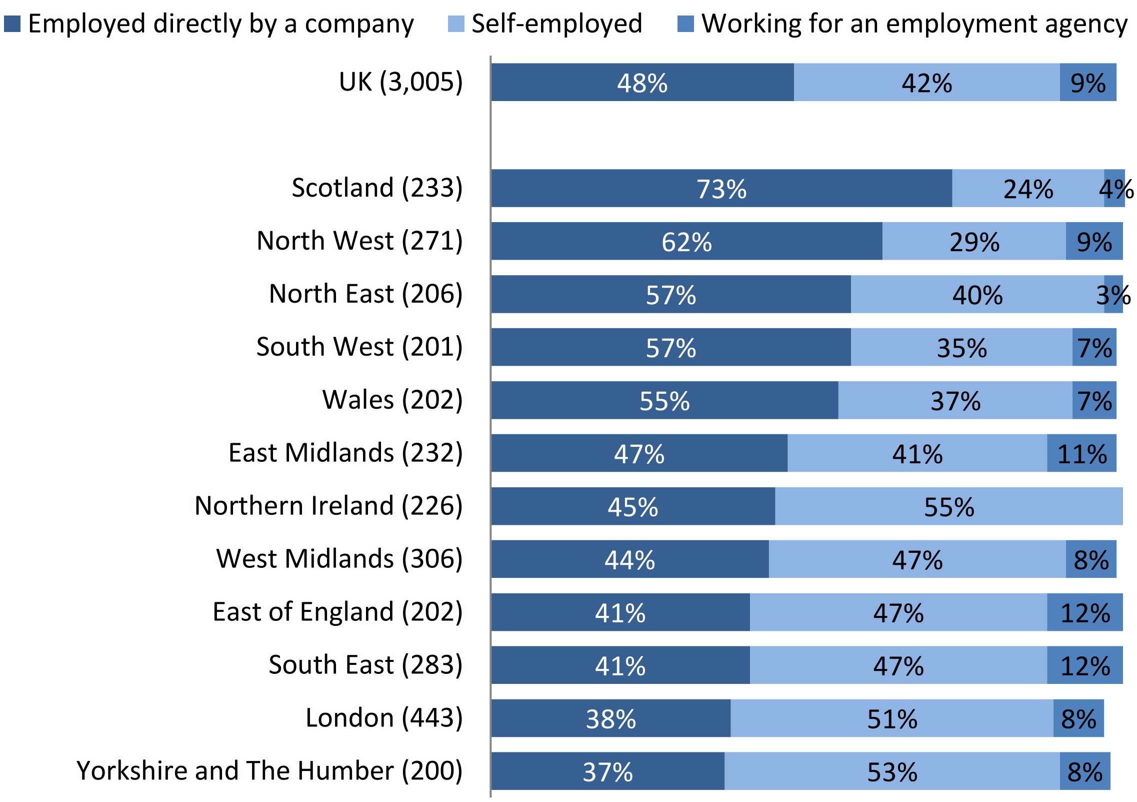
As was the case in 2018/19, there are also a number of variations by region/nation, as Figure 11 summarises. The proportion of workers who are employed directly, 48% on average, continues to be highest in Scotland (73%), and is also higher than average in the North West (62%), the North East (57%), the South West (57%) and Wales (55%).

The proportion of construction workers who are self-employed, 42% on average, is higher than average in Northern Ireland (55%), Yorkshire and the Humber (53%) and London (51%).

Agency employment is higher than average in the South East (12%) and the East of England (12%).

**Figure 11: Employment status by region/nation**

*Base: All respondents*




*Q20. Unweighted bases in parentheses*

## Employment contract basis

Close to three in ten (28%) of all construction workers are employed on a temporary, rather than a permanent basis (67%), much in line with 2018/19 (28% and 70% respectively), and remaining higher than 2015 (23%). The remainder believe they have an 'other' type of contract arrangement (3%).

Construction workers of an ethnic minority background are more likely to be employed on a temporary contract (42% compared to 28% of White construction workers).

The survey shows that 9% of the workforce is employed by an agency. Of these, 82% are on temporary contracts. This last figure compares with the 40% of self-employed workers and 11% of directly-employed workers who are on temporary contracts.

While the overall proportion of temporary workers in the workforce, 28%, has remained stable, there have been significant fluctuations in some regions/nations since 2018/19, with significant increases in:

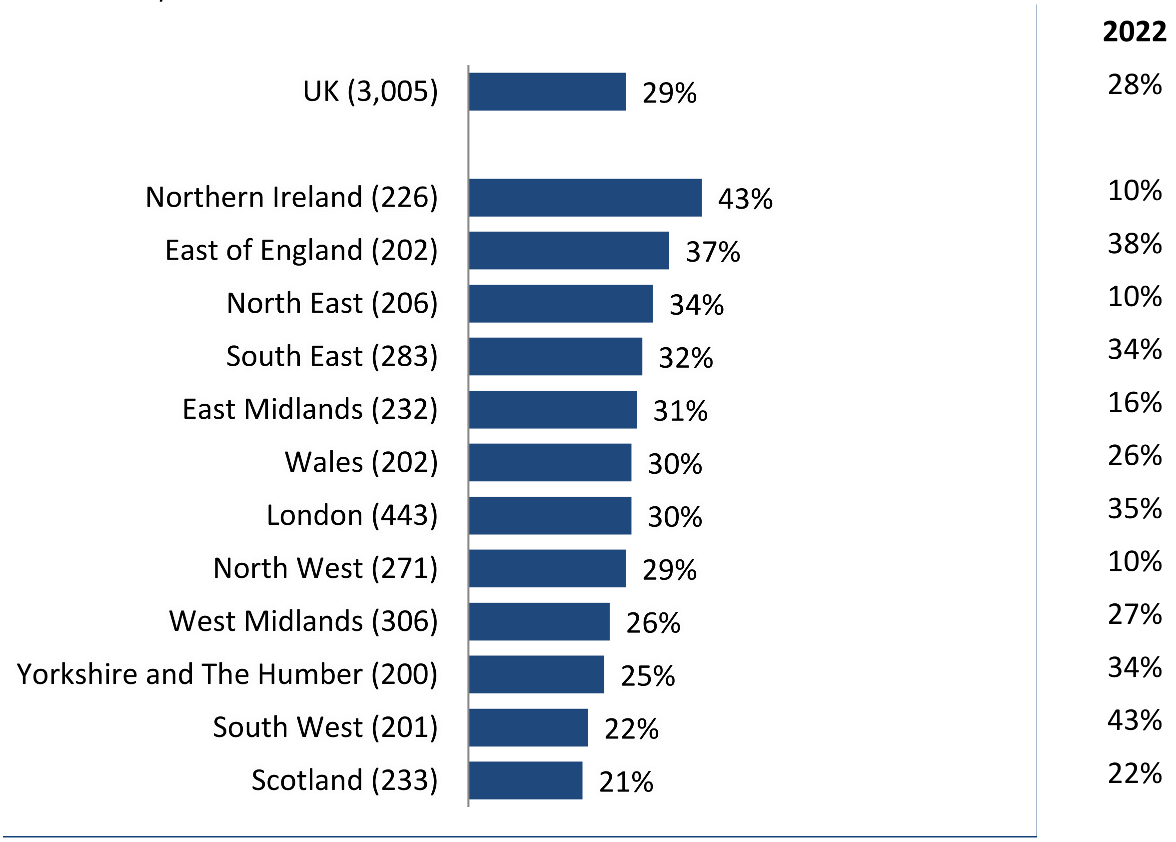
- Northern Ireland (from 10% to 43%)
- the North East (from 10% to 34%)
- the East Midlands (from 16% to 31%)
- the North West (from 10% to 29%)

By contrast the proportion of temporary workers has declined in:

- Yorkshire and the Humber (from 34% to 25%)
- the South West (from 43% to 22%

**Figure 12: 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

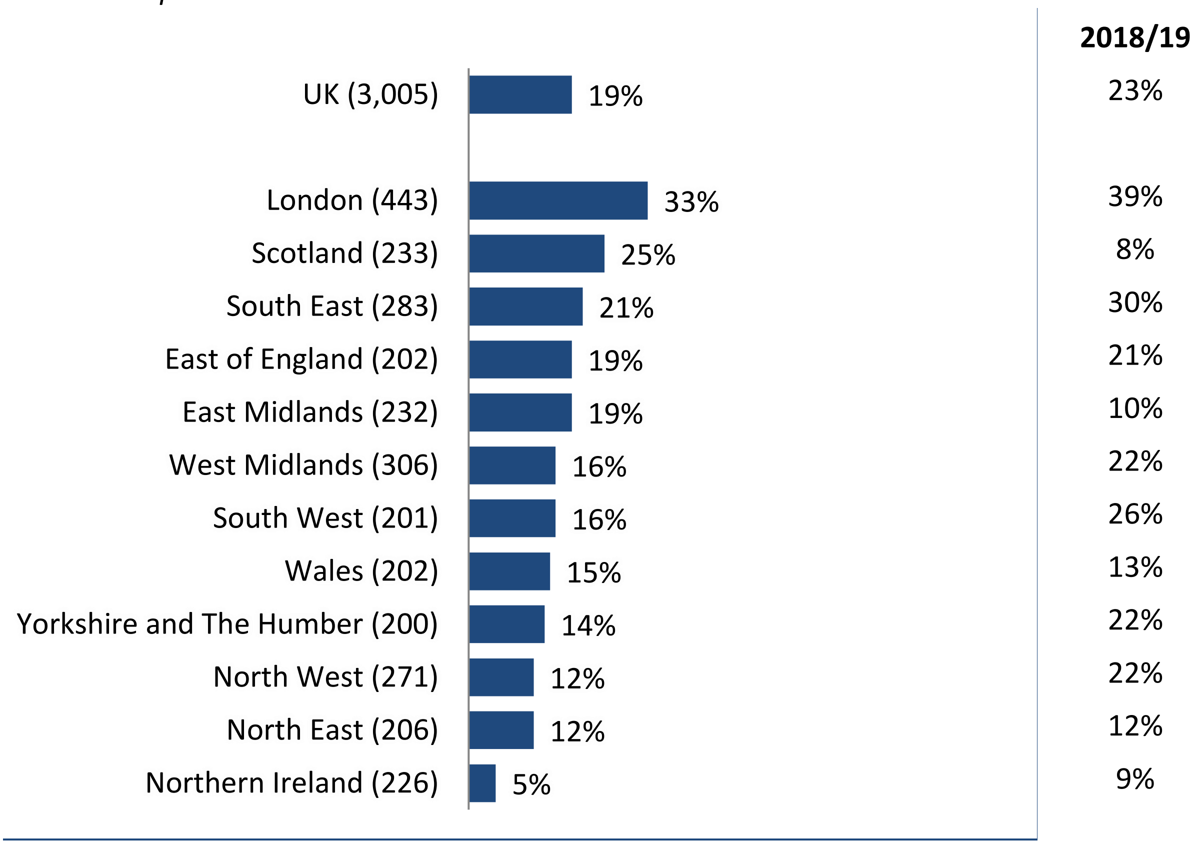
Three in five (59%) construction workers work between 40 and 49 hours per week, in line with 2018/19 (60%). A fifth (19%) work more than 50 hours a week, a decrease on the 23% who reported doing so in 2018/19.

The decrease is driven by those in Northern Ireland (from 9% to 5%), those in Yorkshire and Humber (from 22% to 14%), the North West (from 22% to 12%), the South West (from 26% to 16%), the South East (from 30% to 21% and London (from 39% to 33%). By contrast, proportions have increased in Scotland (from 8% to 25%), and the East Midlands (from 10% to 19%).

Construction workers from ethnic minority groups are more likely than average to work more than 50 hours per week (26% compared with the 19% average). The proportion that works more than 50 hours per week is also significantly higher among steel erectors/riggers (45%) and site managers (37%).

**Figure 13: 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

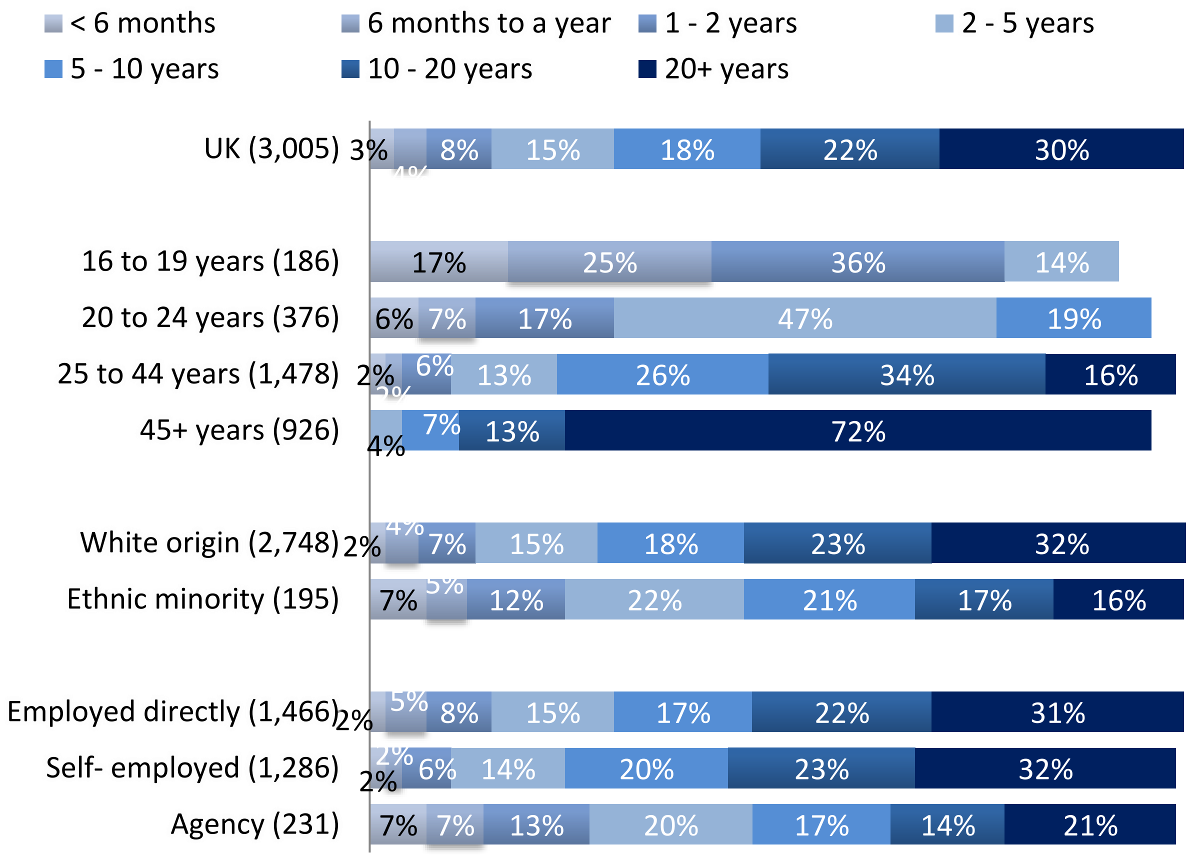
Three in ten (30%) of all construction workers have worked in the construction industry for over 20 years, in line with 2018/19 (32%), and more than half (52%) have worked in the industry for at least 10 years (down on the 58% who reported doing so in 2018/19).

As would be expected, the length of experience in the industry increases with age, with three- quarters of all construction workers aged 45 and over having more than 20 years' experience of working in the sector (72%, compared to 76% in 2018/19 and 77% in 2015).

Workers of a white ethnic origin are more likely to have worked in the construction industry for longer compared with workers from an ethnic minority group (54% have 10+ years' experience, compared with 33% of workers from an ethnic minority group). Workers who are directly employed (53%) or self-employed (55%) are also more likely than those who work for an agency (35%) to have worked in the construction industry for at least 10 years, as the following figure highlights.

**Figure 14: Years spent working in the construction sector**

*Base: All respondents*




*Q1. Unweighted bases in parentheses*

Compared with previous years, Figure 15 shows little change with regard to how long workers have worked in the construction sector. Thus, 30% have 20+ years' experience, compared with 32% in 2018/19 and 31% in 2015, whilst 29% have 5 or fewer years' experience compared with 28% in 2018/10 and 26% in 2015.

**Figure 15: Years spent working in the construction sector (cumulative)**
*Base: All respondents*

| | **2022**<br>% | **2018/19**<br>% | **2015**<br>% |
|---|---|---|---|
| Less than 6 months | 3 | 3 | 4 |
| Up to a year | 7 | 6 | 8 |
| Up to 2 years | 14 | 12 | 14 |
| Up to 5 years | 29 | 28 | 26 |
| Up to 10 years | 48 | 42 | 44 |
| Up to 20 years | 70 | 68 | 69 |
| More than 20 years | 30 | 32 | 31 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* |

*Q1*

## Pre-construction employment histories

Seven out of ten workers (71%) have only ever worked in the construction industry, a similar proportion to that observed in previous iterations of the survey (67% in 2018/19 and 70% in 2015). This includes 61% who have worked in construction pretty much continuously [an uplift on previous surveys (56% in 2018/19 and 55% in 2015)], 4% for whom this is their first job (down from 7% in 2018/19 and 9% in 2015), and 6% who have only ever worked in the construction sector but have had spells out of work (compared to 4% in 2018/19 and 6% in 2015).

The likelihood that workers have worked continuously in construction, 61% on average, increases with age, up to 70% of workers aged 45 or over, whilst, as would be expected, younger workers are more likely to say that this is their first job (16% of 16 to 19 year olds compared with an average of 4% for workers of all ages).

**Figure 16: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.**

*All respondents*

| | **2022** % | **2018/19** % | **2015** % | **Age** % | | | |
|---|---|---|---|---|---|---|---|
| | | | | 16 - 19 | 20 - 24 | 25 - 44 | 45+ |
| I've worked in construction pretty much continuously (and not worked in any other industry) | 61 | 56 | 55 | 59 | 50 | 60 | 70 |
| I have only worked in construction jobs but have had spells of being out of work | 6 | 4 | 6 | 2 | 7 | 7 | 3 |
| My first job was in construction but I've also worked in other sorts of jobs in one or more other industries | 8 | 7 | 8 | 4 | 11 | 8 | 8 |
| My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs | 18 | 23 | 19 | 14 | 17 | 19 | 15 |
| This is my first job. I haven't worked in any other industry. | 4 | 7 | 9 | 16 | 8 | 2 | 2 |
| This is my first job in construction but I have worked in other sorts of jobs in one or more other industries | 4 | 3 | 3 | 6 | 7 | 3 | 2 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *186* | *374* | *1,478* | *926* |

*Q2*

Overall, around one in five (18%) construction workers 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, which is lower than was the case in 2018/19 (23%), but in line with 2015 (19%).

The proportion of respondents who have worked in other sectors before construction continues to be significantly higher amongst those employed by an agency (30%, compared to 37% in 2018/19).

By region/nation, the proportion of workers who have previously worked in other sectors varies from 23% in the South West and 21% in London and the East of England, to 6% in Scotland.

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. As in previous years, around one in five respondents had previously worked in the wholesale/retail sector (20%, compared to 19% in 2018/19 and 22% in 2015). One in ten (11%) had worked in manufacturing, a significantly lower proportion than was the case in 2018/19 (45%) and 2015 (20%). One in ten (12%) had worked in accommodation, up from the 2% in 2018/19 and returning to the level of 2015 (10%).

**Figure 17: Industry worked in before starting work in the construction sector**

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

| | **2022** % | **2018/19** **%** | **2015** % |
|---|---|---|---|
| G – Wholesale and retail trade; repair of motor vehicles and motorcycles | 20 | 19 | 22 |
| I – Accommodation | 12 | 2 | 10 |
| C – Manufacturing | 11 | 45 | 20 |
| H – Transportation and storage | 8 | 6 | 10 |
| *Unweighted bases* | *624* | *862* | *983* |

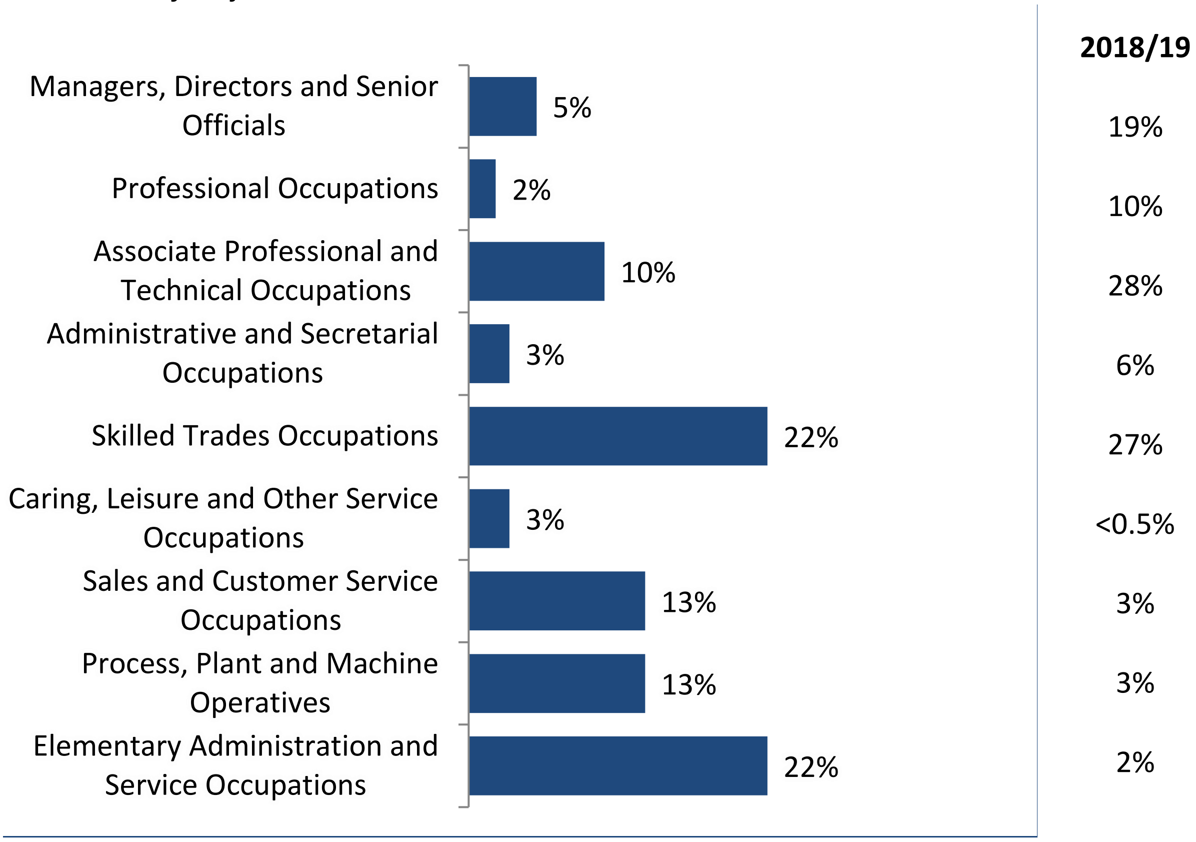
*Q3*

In terms of the job roles that respondents have held in other sectors, the highest proportions were in skilled trades occupations (21%) and elementary administration and service occupations (21%), with the latter showing a significant increase since 2018/19 (2%). There have also been increases in relation to those previously working in Sales and Customer Service Occupations and as Process, Plant and Machine Operatives (from 3% to 13% in both instances).

By contrast there has been a reduction in the proportion who had worked as managers, directors or senior officials, from 19% to 5%, returning it to the levels seen in 2015 (5%). There have also been reductions in the proportions who previously worked in professional occupations (from 10% to 2%) and associate professional and technical occupations (from 28% to 10%).

**Figure 18: Job roles undertaken in other sectors in 2022 compared with 2018/2019**

*Base: Where first job was not in construction*




*Q3. Unweighted base (862)*

## 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, over a third (35%) of all construction workers have worked in more than one construction trade or occupation whilst working in the construction industry, in line with 2018/19 (36%) and 2015 (34%).

Naturally, the proportion of workers who have had more than one role increases with age, from 22% of those aged under 25 to 39% of those aged 45 or over, and with the length of time respondents have worked in construction (from 20% of those with up to a year's experience to 39% amongst those with 5 or more years of experience.

Underlining the greater propensity for construction workers in a supervisory role to have worked in more than one construction trade or occupation, site managers are significantly more likely than average to have done so (56%), although to a lesser extent than in 2018/19 and 2105 (both 69%). Close to half (48%) of plant/machine operatives have worked in other trades or occupations, again to a lesser extent than in 2018/19 and 2015 (both 55%), while electricians, 19%, have the lowest propensity to have worked in other roles.

The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector.

**Figure 19: Percentages having had other construction roles by current occupation**

*Base: All respondents*

<table>
<tr><th colspan="4">MORE likely to have had more than one role (average 35% in 2022)</th><th colspan="4">LESS likely to have had more than one role (average 35% in 2022)</th></tr>
<tr><th></th><th>2022<br>%</th><th>2018/19<br>%</th><th>2015<br>%</th><th></th><th>2022<br>%</th><th>2018/19<br>%</th><th>2015<br>%</th></tr>
<tr><td rowspan="2">Site manager (284)</td><td rowspan="2">56</td><td rowspan="2">69</td><td rowspan="2">69</td><td>Dryliner (78)</td><td>33</td><td>40</td><td>38</td></tr>
<tr><td>Roofer (72)</td><td>33</td><td>27</td><td>27</td></tr>
<tr><td rowspan="2">Plant / Mach. Op. (268)</td><td rowspan="2">48</td><td rowspan="2">55</td><td rowspan="2">55</td><td>Labourer/General operative (707)</td><td>28</td><td>29</td><td>33</td></tr>
<tr><td>Bricklayer (323)</td><td>26</td><td>24</td><td>19</td></tr>
<tr><td rowspan="5" colspan="4"></td><td>Carpenter/joiner (289)</td><td>26</td><td>22</td><td>18</td></tr>
<tr><td>Plumber (91)</td><td>25</td><td>26</td><td>13</td></tr>
<tr><td>Technical (110)</td><td>25</td><td>29</td><td>-</td></tr>
<tr><td>Scaffolder (95)</td><td>22</td><td>34</td><td>31</td></tr>
<tr><td>Electrician (167)</td><td>19</td><td>17</td><td>13</td></tr>
<tr><td colspan="8">Unweighted bases for 2022 in parentheses</td></tr>
</table>

*Q6*

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 35% of all construction workers that had worked in at least one other role/occupation 19% had worked in 1 previous role, 49% had worked in 2 previous roles, 25% had worked in 3 roles/occupations and 7% had worked in 4 roles/occupations.

Figure 20 summarises the previous trades/occupations most frequently listed by those who had worked in other roles in the construction sector.

Workers are most likely to have previously worked as a labourer/general operative (36%), while 14% had previously worked as a carpenter/joiner and 11% as a bricklayer (12%). This is largely in line with previous findings.

**Figure 20: Previous occupations/trades in the construction sector**
*Base: Workers that have switched occupations within construction*

| **Occupation** | **2022 %** | **2018/19 %** | **2015 %** |
|---|---|---|---|
| Labourer/General operative | 39 | 34 | 30 |
| Carpenter/joiner | 15 | 19 | 18 |
| Bricklayer | 12 | 12 | 13 |
| Plant/machine operative (e.g. Fork lift/JCB) | 10 | 10 | 10 |
| Dryliner | 5 | 8 | 7 |
| Plasterer | 5 | 8 | 7 |
| Roofer | 4 | 8 | 9 |
| Painter/decorator | 4 | 7 | 8 |
| Banksman/Banksperson | 7 | 6 | 7 |
| Ceiling fixer | 3 | 5 | 4 |
| Electrician | 2 | 5 | 3 |
| Plumber | 3 | 5 | 5 |
| Site manager | 4 | 5 | 5 |
| Floorer | 4 | 4 | 3 |
| Pipe fitter | 2 | 4 | 5 |
| Scaffolder | 2 | 4 | 4 |
| Steel erector/rigger | 2 | 4 | 3 |
| Technical e.g. surveyor, maintenance technician | 2 | 3 | 4 |
| Welder | 1 | 2 | 2 |
| Mechanical fitter | 2 | 1 | 1 |
| Other | 10 | 7 | 6 |
| *Unweighted base* | *1,082* | *1,328* | *1,576* |

*Q7*

## Future career plans

Construction workers were asked to think about their future career plans and whether they think it is likely they will still want to work in construction in five years' time. Overall, seven in ten (71%) feel it is very likely that they will still want to, somewhat lower than the 74% who felt this was the case in 2018/19.

This decline is largely driven by the fact that the proportion who feel they *definitely* would has declined from 48% in 2018/19 to 40% in 2022.

Nevertheless, the proportion who feel it would be unlikely that they will still want to work in the construction sector has remained at just 5%. The remainder feel it is quite likely (12%), or that they hoped to be retired (4%), or were unsure (6%).

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 42% of construction workers aged 60 and over. The proportion that felt they *definitely* will still want to work in the construction sector in five years increases with age but peaks amongst 45-54 year olds (47%), dropping off quite sharply after this, to 35% of those aged 55 to 59 and 26% of those aged 60 or over.

**Figure 21: 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 - 54 | 55 - 59 | 60+ |
| Definitely will be | 43 | 44 | 42 | 46 | 47 | 35 | 26 |
| Very likely | 27 | 23 | 27 | 29 | 30 | 28 | 15 |
| Quite likely | 12 | 16 | 15 | 13 | 11 | 11 | 4 |
| Quite unlikely | 2 | 3 | 4 | 2 | 2 | 2 | 4 |
| Very unlikely | 3 | 3 | 4 | 3 | 1 | 4 | 6 |
| Definitely will not be | 2 | 3 | 2 | 2 | 1 | 2 | 2 |
| Hope to be retired | 4 | 1 | 1 | <0.5 | 2 | 13 | 42 |
| Don't know | 6 | 8 | 5 | 5 | 6 | 6 | 1 |
| *Unweighted bases* | *3,005* | *186* | *376* | *1,478* | *514* | *222* | *190* |

*Q38A*

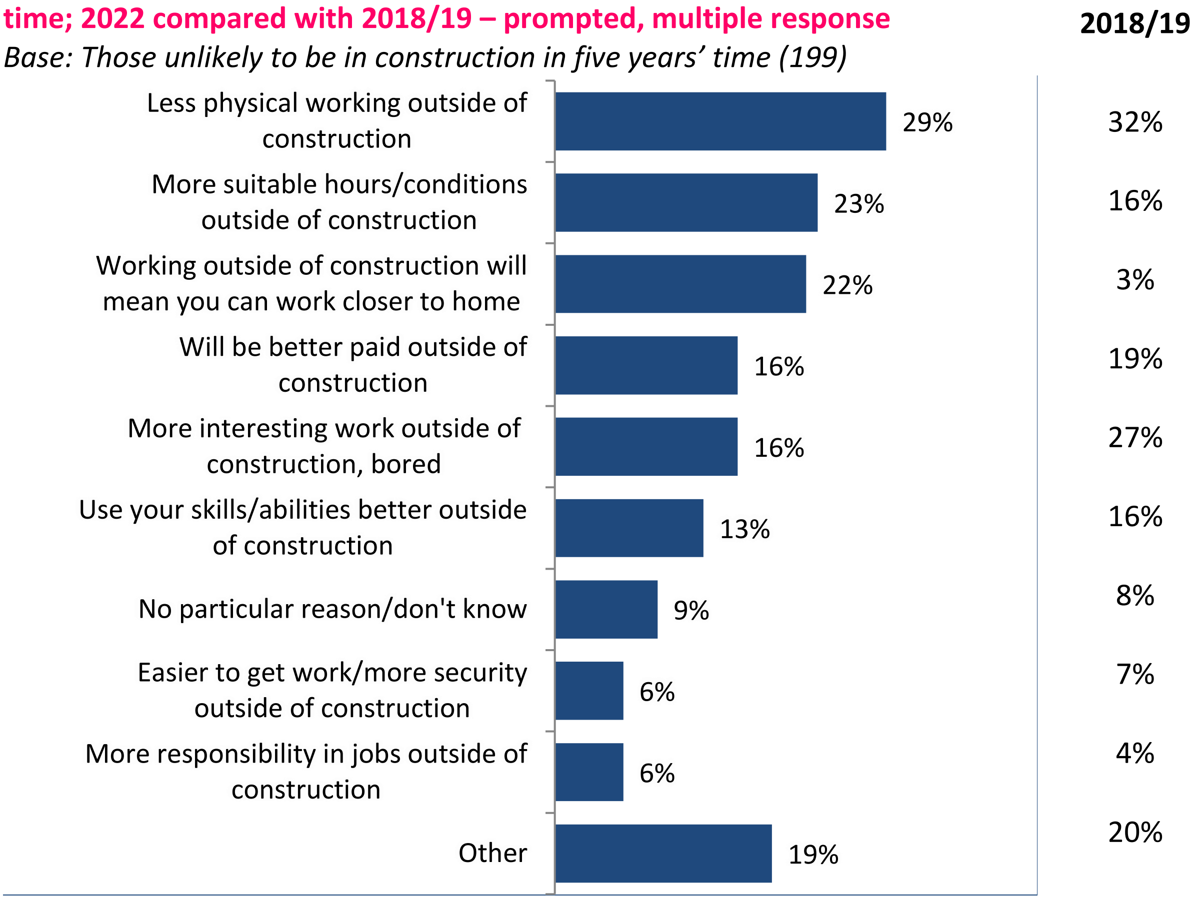
The 5% of construction workers who felt it was unlikely that they will still want to work in the construction sector in five years' time were asked the reasons why this was so.

They were most likely to cite the fact that work outside of construction might be less physical (29% compared to 32% in 2018/19), followed by more suitable hours/conditions (23%, up from 16% in 2018/19.

There has been a particular uplift in those citing working closer to home from 3% in 2018/19 to 22% in 2022. By contrast there is a decline in the proportion which thought they might find more interesting work outside of construction and that they would be bored by what they are doing now and need a change, from 27% in 2018/19 to 16% in 2022. The same proportion (16%) cite expectations of better pay (compared to 19% in 2018/19).

**Figure 22: Reasons for not wanting to be working in the construction sector in five years' time; 2022 compared with 2018/19 – prompted, multiple response**

*Base: Those unlikely to be in construction in five years' time (199)*



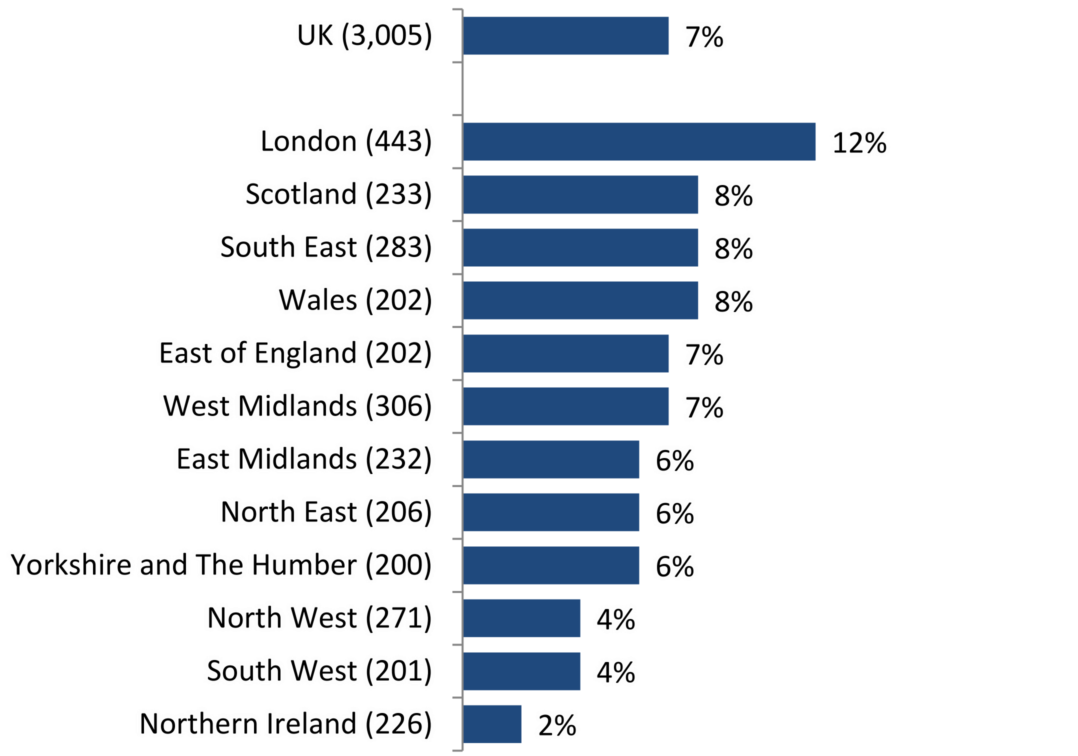

*Q38B*

Thinking further about their future plans in construction, 80% of construction workers would like to carry on in the same trade or occupation, exactly in line with 2018/19, whilst 7% would like to change their trade/occupation (compared to 10% in 2018/19). The remainder would like to leave construction (5%) or were unsure (8%).

Focusing on those construction workers who would like to change their trade or occupation, most regions are in line with the average, with the exception of London, where 12% would like to change trades, and Northern Ireland, where only 2% would like to do so.

**Figure 23: Proportion of construction workers who would like to change their trade or occupation within the construction sector, by region/nation**

*Base: All respondents*



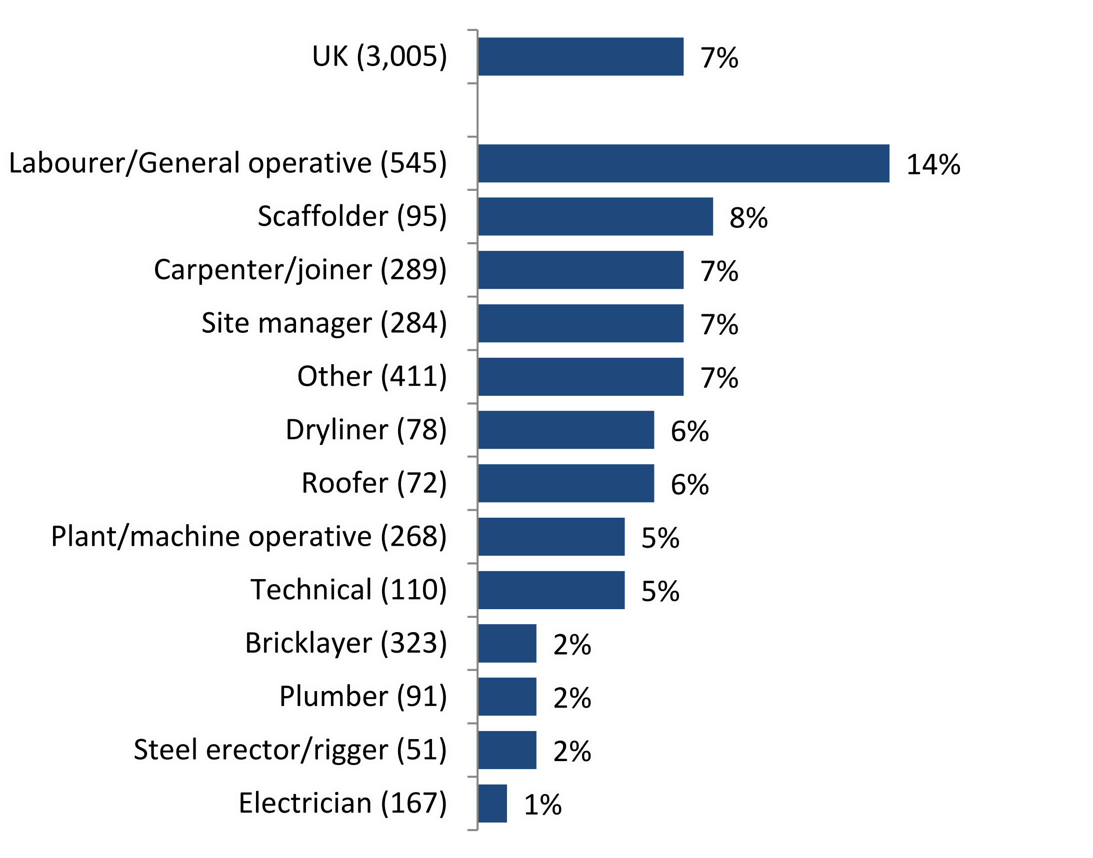

*Q33. Unweighted bases in parentheses*

Construction workers currently working for an agency continue to be more likely to want to change their trade or occupation (15% compared to 6% of those employed directly and 7% of those who are self-employed), but to a lesser extent than was the case in 2018/19, when 27% wanted to change their trade or occupation.

By current trade/occupation, those working as a labourers/general operatives (14%) are most likely to want to change trade or occupation, and electricians the least (1%), as the following chart illustrates.

**Figure 24: Proportion of construction workers that would like to change their trade or occupation, by current trade/occupation**

*Base: All respondents*




*Q33. Unweighted bases in parentheses*

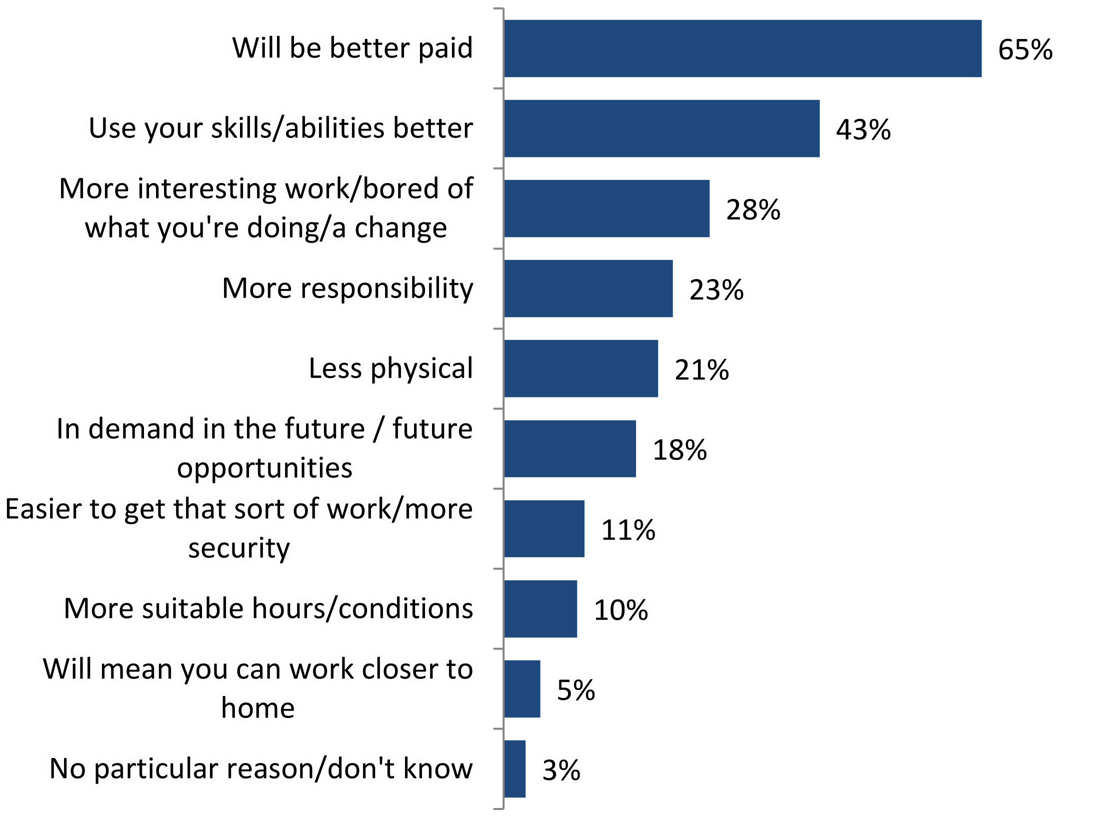
As in previous iterations of the survey, amongst those who would like to change trade or occupation, the highest proportion would like to be a site manager (25%). Otherwise a wide range of alternative trades/occupations are mentioned, with one in ten mentioning bricklaying (9%) and plant/machine operative (9%) as aspirations.

Two in three (66%) of construction workers who would like to change trade or occupation believe they will require further training or qualifications in order to do this other kind of work, a lower proportion than was the case in 2018/19 (87%) and in 2015 (77%).

The most frequently cited reason for wanting to change trade or occupation is the expectation that they would be better paid (65%, compared to 69% in 2018/19 and 59% in 2015). Over two-fifths wanted to use their skills/abilities better (43%), while over a quarter (27%) believe it would mean more interesting work.

**Figure 25: Reasons for wanting to change trade/occupation**

*Base: Where workers would like to change trade/occupation*




*Q36. Unweighted base (373)*

## 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 (93%) of all construction workers report holding a skill card or certificate (e.g. CSCS or CSR), this is a reduction on the 97% who did so in 2018/19 and on earlier surveys, and the proportion who report holding no cards has risen from 2% to 6%.

Figure 26 sets out the proportions of workers by region/nation who hold any card and compares these proportions with the 2018/19, 2015 and 2012 surveys. Almost all workers in the South West, Northern Ireland and the North East report having a card (all 97%), with levels for other regions in line with the average. The most notable decreases in card-holding are in the West Midlands and Scotland, at 91% in both instances, and down from 99% in both instances since 2018/19.

**Figure 26: Proportion of workers who have a skill card/certificate, by region/nation**

*Base: All respondents*

| | **2022**<br>% | **2018/19**<br>% | **2015**<br>% | **2012**<br>% |
|---|---|---|---|---|
| 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 |
| *Unweighted bases for 2022 in parentheses* | | | | |

*Q33*

As in previous surveys, the incidence of workers holding skill cards or certificates remains lower amongst the youngest workers (83% amongst 16 to 19 year olds) and those who are very new to the construction industry (77% of those who have worked in the industry for less than 6 months). There have been decreases in the proportion holding skill cards or certificates across a range of industry sub-groups as Figure 27 shows.

**Figure 27: Proportion of workers who have a skill card/certificate, by other variables**

*Base: All respondents*

| | | 2022 % | 2018/19 % | 2015 % | 2012 % |
|---|---|---|---|---|---|
| Total (3,005) | | 93 | 97 | 96 | 97 |
| Age | 16 to 19 years (186) | 83 | 85 | 86 | 86 |
| | 20 to 24 years (376) | 89 | 97 | 95 | 95 |
| | 25 to 44 years (1,478) | 93 | 98 | 99 | 99 |
| | 45+ years (926) | 94 | 98 | 97 | 97 |
| Length of time in construction | <1 year in construction (203) | 81 | 89 | 89 | 89 |
| | 1 to 2 years (225) | 79 | 97 | 86 | 86 |
| | 2 to 5 years (441) | 92 | 96 | 96 | 96 |
| | 5+ years (2,132) | 95 | 98 | 98 | 98 |
| Contract-type | Employed directly (1,466) | 90 | 96 | 97 | 97 |
| | Self-employed (1,286) | 96 | 98 | 99 | 99 |
| | Agency (231) | 90 | 97 | 92 | 92 |
| Location before working in construction sector in UK | UK/ROI national (2,909) | 93 | 97 | 97 | 97 |
| | Migrant worker (96) | 91 | 98 | 98 | 98 |
| *Unweighted bases for 2022 in parentheses* | | | | | |

*Q12*

In terms of the type of skill card or certificate held by workers, the CSCS [Construction Skills Certification Scheme (GB)] remains the most commonly held (80%), but at lower levels than in 2018/19 (85%) and 2015 (86%).

The proportion holding the CISRS [Construction Industry Scaffolders Record Scheme] is consistent with previous surveys (3%), while there has been an increase in the proportion holding the CPCS [Construction Plant Competence Scheme], from 11% in 2018/19 to 14% in 2022, bringing this back to the level seen in 2015 (13%).

Overall, 5% hold the CSR [Construction Skills Register (NI)] card/certificate, largely explained by the 96% proportion amongst workers from Northern Ireland, a proportion which is significantly higher than in 2018/19 (85%) and 2015 (70%), as well as higher than the proportion which holds the CSCS (GB) (80%).

**Figure 28: Type of skill card/certificate held**

*Base: All respondents*

| | 2022<br>% | 2018/19<br>% | 2015<br>% |
|---|---|---|---|
| Total (3,005) | 93 | 97 | 96 |
| CSCS (Construction Skills Certification Scheme) (GB) | 80 | 85 | 86 |
| CSR (Construction Skills Register) (NI) | 5 | 3 | 3 |
| CISRS (Construction Industry Scaffolders Record Scheme) | 3 | 3 | 4 |
| CPCS (Construction Plant Competence Scheme) | 14 | 11 | 13 |
| Other | 6 | 4 | 4 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* |

*Q12*

By current job role, while scaffolders are less likely to hold CSCS (47%), this is because they are more likely to hold CISRS (59%), and 99% of this group hold at least one card or certificate.

Similarly, while electricians are also less likely to hold CSCS (53%), they are more likely to hold another type of card or certificate (39%), presumably specific to their trade.

Labourers/general operatives are also less likely than average to hold any of the cards or certificates, such that over one in ten (13%) hold none.

Workers who hold either a CSCS or CSR card were asked what colour their cards are. Figure 29 summarises the types of cards held by workers, with the CSR card colours split into sub-levels.

Overall, 8% of CSCS and 4% of CSR card holders have Red cards, three in ten of CSCS (30%) and CSR card holders (31%) have Green cards, and a third of CSCS (34%) and CSR (35%) have Blue cards, an uplift on 2018/19 (29% and 25% respectively). Around one in seven (15%) of CSCS, and one in five (22%) CSR card holders have a Gold card, both somewhat down on 2018/19 (17% and 27% respectively).

There were few significant differences by region/nation

**Figure 29: Colour of CSCS/CSR cards held**

*Base: Where CSCS or CSR cards are held*

| | **2022 CSCS %** | **2018/19 CSCS %** | **2015 CSCS %** | | **2022 CSR %** | **2018/19 CSR %** | **2015 CSR %** |
|---|---|---|---|---|---|---|---|
| Red – Trainee | 5 | 4 | 5 | Red – Apprenticeship/Trainee | 3 | 5 | 7 |
| Red – Experienced worker card | 3 | 3 | 2 | Red – Trained Plant Operator | 1 | 1 | 2 |
| | | | | Red – Trainee Supervisor/Manager for undergraduates/ recent graduates | 3 | 2 | 1 |
| Green – construction site operative card for general site workers | 30 | 33 | 35 | Green – Construction Operative (for general site workers) | 31 | 29 | 29 |
| Blue – skilled | 34 | 29 | 27 | Blue – Operative/ Craft | 25 | 20 | 11 |
| | | | | Blue – Plant Operator | 10 | 5 | 7 |
| | | | | Blue – Basic Scaffolder | <0.5 | <0.5 | 4 |
| Gold – advanced craft/skilled worker | 8 | 11 | 18 | Gold – Craft/Supervisor Card | 20 | 26 | 29 |
| Gold – supervisor card | 7 | 6 | | Gold – Advanced Scaffolder | 2 | 1 | 1 |
| | | | | Platinum – Manager Card | 1 | 2 | 2 |
| Black – manager card | 6 | 6 | 5 | Black – Senior Managers Card | 1 | 3 | 1 |
| Academically Qualified Persons Card | 2 | 3 | | | | | |
| Professionally Qualified Persons Card | 1 | 1 | | | | | |
| Provisional Card (Requires Operatives HSE test within 2 years) | <0.5% | <0.5% | | | | | |
| Construction Site Visitor Card (HSE operatives test within 2 years) | <0.5% | <0.5% | | | | | |
| Apprentice Card | 1 | 1 | | | | | |
| Other | 1 | 2 | 2 | Other Professional cards, visitor cards, temporary cards | 0 | 4 | 5 |
| Unsure | 2 | 2 | 4 | Unsure | 3 | 3 | 2 |
| *Unweighted bases* | *2,318* | *3,398* | *3,975* | | *284* | *176* | *220* |

*Q13/Q14*

Card colours also vary significantly according to current occupation/trade, as Figure 30 summarises. Some significant differences include those that labourers/general operatives are most likely to hold Green cards (66%), while plant/machine operatives are most likely to hold Blue cards (66%), as are dryliners (60%), bricklayers (50%) and carpenters/joiners (42%). Electricians are more likely than average to hold a Gold card (39%), and site managers are more likely to hold Gold (27%) and Black (36%) cards.

**Figure 30: Colour of CSCS card held, by current occupation**

*Base: All respondents*

| | *Unweighted bases* | Red: Trainee % | Red: Experienced worker card % | Green % | Blue % | Gold: Advanced craft/ skilled worker card % | Gold: Supervisors card % | Black % |
|---|---|---|---|---|---|---|---|---|
| Bricklayer | *279* | 6 | 2 | 15 | 50 | 14 | 6 | 3 |
| Carpenter/joiner | *224* | 6 | 5 | 14 | 42 | 18 | 10 | 3 |
| Dryliner | *72* | 1 | 0 | 2 | 76 | 2 | 8 | 1 |
| Electrician | *86* | 5 | 1 | 20 | 10 | 39 | 6 | 4 |
| Labourer/general operative | *410* | 7 | 7 | 66 | 16 | <0.5 | 1 | 0 |
| Plant/machine operative | *176* | 4 | 5 | 17 | 66 | 2 | <0.5 | 1 |
| Plumber | *79* | 8 | 2 | 12 | 40 | 20 | 9 | 1 |
| Roofer | *67* | 0 | 2 | 55 | 32 | 3 | 4 | 0 |
| Site manager | *235* | 6 | 1 | 9 | 10 | 5 | 22 | 36 |
| Technical | *86* | 9 | 1 | 25 | 9 | 4 | 6 | 6 |
| Other | *334* | 2 | 4 | 35 | 33 | 2 | 9 | 8 |

*Q13*

## 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, fewer than half (47%) say they had no formal qualifications when they first started working in the construction industry, a significantly lower proportion than the 72% who reported this in 2018/19 and the 75% who reported this in 2015.

The proportion which says they had no formal qualifications when they first started working in the construction industry remains higher amongst older workers (58% of 55+ year olds cf. 48% of 16-24 year olds).

By current trade/occupation the proportion of workers who started their construction careers with no formal qualifications is highest amongst steel erectors/riggers (64%), labourers/general operatives (59%), scaffolders (58%) and roofers (57%), and lowest among dryliners (29%), technicians (31%), electricians (35%), plumbers (36%), site managers (37%) and bricklayers (41%).

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 (69%) of all construction workers hold some sort of construction-related qualification, as compared to 72% in 2018/19 and 67% in 2015.

As Figure 31 summarises, the proportion of workers that hold any qualifications continues to be lowest amongst the youngest workers (54% of those aged 16 to 19).

The proportion that holds a qualification tends to increase with the length of time in construction. Self-employed workers are more likely than average to have a construction specific qualification (74%), and agency workers are less likely than average to do so (50%).

**Figure 31: Proportion of workers that hold any construction-specific qualification**
*Base: All respondents*

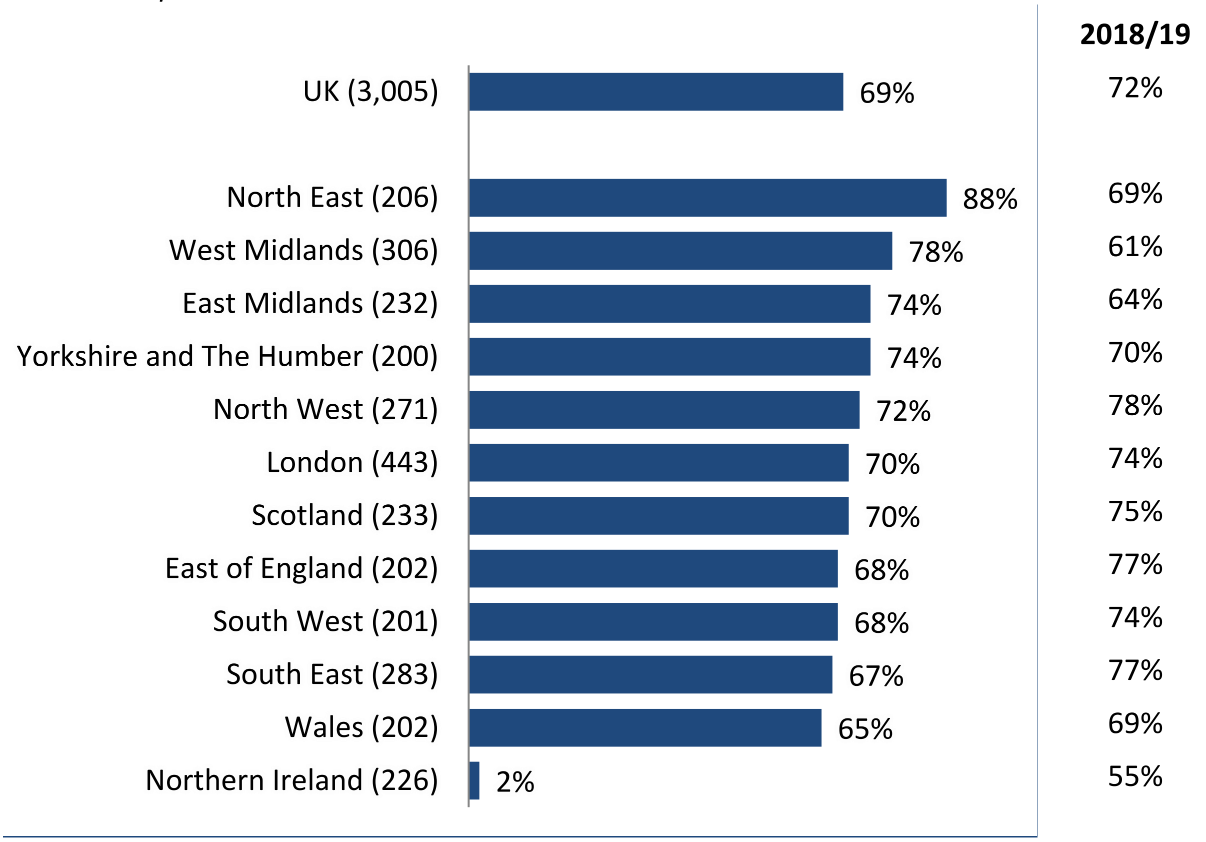
| | | 2022 % | 2018/19 % | 2015 % |
|---|---|---|---|---|
| Total - UK (3,005) | | 69 | 72 | 67 |
| Age | 16 to 19 years (186) | 54 | 52 | 65 |
| | 20 to 24 years (376) | 64 | 63 | 64 |
| | 25 to 44 years (1,478) | 72 | 74 | 69 |
| | 45+ years (926) | 69 | 76 | 68 |
| Ethnicity | White (2,748) | 70 | 72 | 69 |
| | Ethnic minority (195) | 63 | 72 | 57 |
| Length of time in construction | <1 year (227) | 46 | 34 | 38 |
| | 1 to 2 years (212) | 43 | 52 | 55 |
| | 2 to 5 years (632) | 62 | 63 | 59 |
| | 5+ years (2942) | 75 | 79 | 73 |
| Current contract type | Employed directly (1,466) | 69 | 75 | 70 |
| | Self- employed (1,286) | 74 | 73 | 67 |
| | Agency (231) | 50 | 49 | 54 |
| Location where living just before they started working in construction in the UK | UK/ROI national (2,909) | 69 | 72 | 74 |
| | Migrant worker (96) | 61 | 73 | 49 |
| *Unweighted bases for 2022 in parentheses* | | | | |

*Q15/Q16*

The proportion of workers who hold qualifications is higher than average in the North East (88%) and the West Midlands (78%), with all other regions apart from Northern Ireland much in line with the average. The level of construction specific qualifications in Northern Ireland is particularly low, and this may be in part explained by the very high level of workers here (97%) holding a card for the Construction Skills Register.

**Figure 32: Proportion of workers that hold any construction-specific qualification, 2022 compared with 2018/19, by region/nation**

*Base: All respondents*




*Q15/Q16. Unweighted bases in parentheses*

The likelihood that workers hold construction-related qualifications varies significantly by current job role. Having seen a large increase since 2019/19 and 2015, dryliners are now the most likely to hold construction-specific qualifications (87% compared to 61% in 2018/19 and 63% in 2015). Other job roles with higher than average levels of construction-specific qualifications are plumbers (87%), steel erectors/riggers (86%), scaffolders (82%), carpenters/joiners (79%), electricians (79%), bricklayers (78%) and site managers (77%). While these levels are largely in line with previous years, there has been a decline among site managers, from 90% in 2018/19 to 77% in 2022.

The only job role that sits below the average in this respect is labourer/general operative (45%).

**Figure 33: Job roles where a higher-than-average proportion of workers hold any construction-specific qualification, by current occupation**

*Base: All respondents*

| HIGHER likelihood | 2022 % | 2018/19 % | 2015 % |
|---|---|---|---|
| Dryliner (78) | 87 | 61 | 63 |
| Plumber (91) | 87 | 86 | 84 |
| Steel erector/rigger (51) | 86 | Na | Na |
| Scaffolder (95) | 82 | 79 | 82 |
| Carpenter/Joiner (289) | 79 | 84 | 78 |
| Electrician (167) | 79 | 83 | 83 |
| Bricklayer (514) | 78 | 81 | 73 |
| Site manager (383) | 77 | 90 | 86 |
| *Unweighted bases for 2022 in parentheses* | | | |

*Q15/Q16*

## 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 34 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 are NVQ/SVQ qualifications, but to a greater extent than previously (69% compared to 58% in 2018/19 and 66% in 2015).

One in five (18%) construction workers with qualifications hold City & Guilds qualifications (compared to 14% in 2018/19 and 20% in 2015), whilst one in ten (11%) construction workers with qualifications now hold an apprenticeship (compared to 6% in 2018/19 and 13% in 2015).

One in twenty construction workers with qualifications hold an HNC/HND/BTEC Higher or a degree (both 5%) or have a Construction Award (3%).

**Figure 34: Main type of qualification held**

*Base: Workers with qualifications (valid responses)*

| | 2022 % | 2018/19 % | 2015 % |
|---|---|---|---|
| NVQ/SVQ | 69 | 58 | 66 |
| City & Guilds | 18 | 14 | 20 |
| Construction Award | 3 | Na | Na |
| Apprenticeship | 11 | 6 | 13 |
| HNC/HND/BTEC Higher | 5 | 6 | 4 |
| Degree | 5 | 7 | 4 |
| Other | 12 | 24 | 11 |
| *Unweighted bases* | *2,093* | *2,122* | *2,455* |

*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.

Overall, one in five (19%) workers believe they would benefit from some form of training in basic skills, returning this to the level seem in 2012 (20%) following a dip in 2015 (14%) and 2018/19 (11%). Although it should be noted that an additional category was added for the latest survey – digital skills – in which one in twenty-five (4%) believe they need training.

However, there has also been an increase in the proportion who feel they would benefit from training in reading, from 5% in 2018/19 to 9% in 2022, and in the proportion who feel they would benefit from training in speaking English, from 6% to 9%.

**Figure 35: Self-assessed need for training in basic skills**

*Base: All respondents*

| | 2022 % | 2018/19 % | 2015 % | 2012 % |
|---|---|---|---|---|
| ANY | 19 | 11 | 14 | 20 |
| Reading | 9 | 5 | 6 | 9 |
| Writing | 7 | 5 | 6 | 9 |
| Speaking English | 9 | 6 | 7 | 8 |
| Maths | 6 | 5 | 6 | 10 |
| Digital skills | 4 | Na | Na | Na |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *4,933* |

*Q37*

Workers in London are much more likely than average to feel they would benefit from training in basic skills (44% compared to the average of 19%), and this is true across each skill, but particularly in relation to speaking English (29% compared to 9%). While this was also the case in 2018/19 (19% felt they would benefit from training in at least one skill, and 14% in relation to speaking English), it is to a much greater extent in the latest survey.

Workers in Wales are also more likely than average to identify a need for training overall (24%), particularly in relation to digital skills and maths (8% and 10% respectively). Workers in Northern Ireland are also more likely than average to identify a need for training in digital skills (12%) and maths (11%)

By contrast, workers in the North East (6%, Scotland (6%), the North West (8%) and Yorkshire and Humber (10%) are less likely than average to identify the need for any such training.

A number of other specific sub-groups of construction workers are more likely to believe they would benefit from some training in basic skills:

- Younger workers aged 16-19 (24% cf. 14% aged 45+);
- Workers from an ethnic minority group (33%) and White Other workers (44%), compared with 13% of White British workers;
- Migrant workers (48%); across all skills, but in particular with speaking English (33%).

### *Current study for additional construction qualifications*

Overall, 13% of all construction workers are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 15% in 2018/19, 12% in 2015 and 11% in 2012.

As in previous surveys, the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (43% of 16 to 19 year olds and 24% of 20 to 24 year olds), although for the youngest age group – 16 to 19 year olds – this is to a lesser extent than was the case in 2018/19 (55%) and previous years.

While workers employed directly (15%) continue to be more likely than those who are self-employed (10%) or working for an agency (8%), this is to a lower extent than was the case in 2018/19 (when 20% of directly employed workers were working towards a qualification).

By qualification level, workers currently qualified to Level 1 are most likely to be working towards qualifications (17%), but this is lower than the 27% who were doing so in 2018/19. Of those who have no qualifications currently one in ten are working towards one (11%).

**Figure 36: Proportion working towards additional construction qualifications**

*Base: All respondents*

| | | 2022 % | 2018/19 % | 2015 % | 2012 % |
|---|---|---|---|---|---|
| | Total (3,005) | 13 | 15 | 12 | 11 |
| Age | 16 to 19 years (186) | 43 | 55 | 57 | 56 |
| | 20 to 24 years (376) | 24 | 24 | 23 | 20 |
| | 25 to 44 years (1,478) | 11 | 14 | 10 | 7 |
| | 45+ years (926) | 5 | 6 | 4 | |
| Length of time in construction | <1 year (203) | 28 | 38 | 31 | 26 |
| | 1 to 2 years (225) | 27 | 31 | 28 | 35 |
| | 2 to 5 years (441) | 20 | 25 | 23 | 21 |
| | 5+ years (2,132) | 8 | 9 | 7 | 8 |
| Contract type | Employed directly (1,466) | 15 | 20 | 16 | 14 |
| | Self- employed (1,286) | 10 | 9 | 8 | N/A |
| | Agency (231) | 8 | 11 | 10 | N/A |
| Highest qualification level | None (729) | 11 | 16 | 11 | N/A |
| | Level 1 (238) | 17 | 27 | 32 | N/A |
| | Level 2 (860) | 12 | 12 | 15 | N/A |
| | Level 3 (588) | 11 | 14 | 8 | N/A |
| | Level 4+ (316) | 16 | 21 | 15 | N/A |
| *Unweighted bases for 2022 in parentheses* | | | | | |

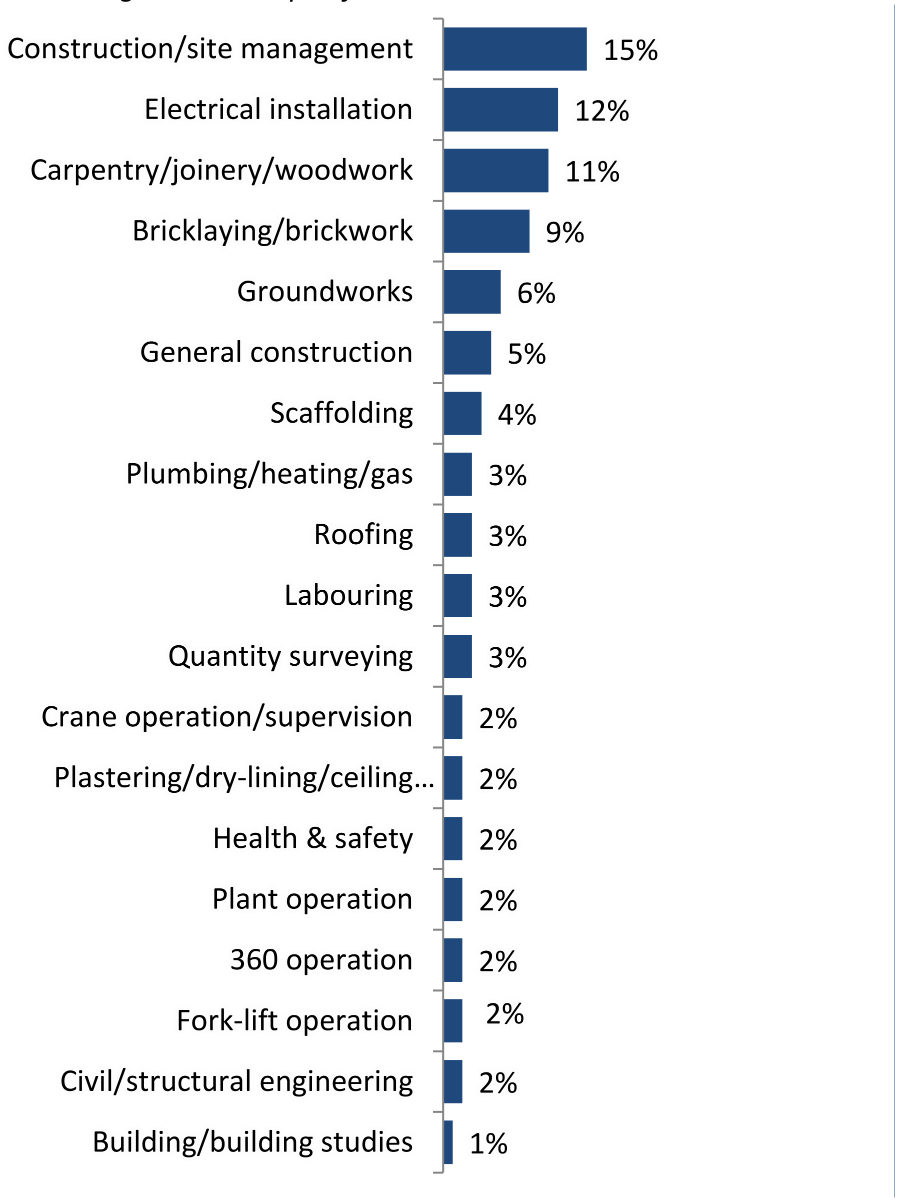
*Q18*

Variations are also evident by current job role, with those in technical roles (26%), electricians (25%) and site managers (21%) most likely to be working towards qualifications currently (as was the case in 2018/19) and labourers/general operatives (8%) and plant/machine operatives (7%) least likely.

Of those who are currently studying for a qualification (and who provided a response) the most frequent type of qualification is an NVQ/SVQ (58%). In terms of the subject of the qualifications being worked towards, construction/project/site management (15%), followed by electrical installation/engineering (12%) and carpentry/joinery (11%) are most frequent.

**Figure 37: Subject of qualification being worked towards**

*Base: Where working towards a qualification*




*Q19. Unweighted base = 373*

## Supervisory and managerial qualifications and training

As reported earlier, close to three in ten (28%) construction workers 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, close to one in five (17%) want to become a supervisor or manager in the future (fewer than the 24% who did so in 2018/19 and the 20% who did so in 2015). As in 2018/19 and 2015, a further 6% have had a supervisory/managerial role previously and want to return to that status. One in six (18%) of all construction workers not currently managers/supervisors are unsure as to whether they would like to be one in the future (compared to 20% in 2018/19), while three in five (59%) are certain that they do not want to be, an increase on the 51% proportion in 2018/19.

By age, those aged 16 to 24 are most likely to want to be supervisors/managers (28%), while 76% of those aged 45 or over do not wish to. Workers from an ethnic minority group are significantly more likely than White workers to want to be supervisors/managers, whether they have been in such positions before or not (41% compared to 21%). Self-employed workers (27%) are more likely to want to be supervisors/managers than those employed directly (19%) and agency staff (22%).

Two-thirds (64%) of those with no qualifications do not want to become a supervisor or manager, while those with level 1 qualifications are most likely to want to do so (25%).

**Figure 38: 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 Total (1,982) | | 17 | 6 | 59 | 18 |
| Age | 16 to 19 years (171) | 20 | 2 | 48 | 31 |
| | 20 to 24 years (310) | 29 | 2 | 42 | 27 |
| | 25 to 44 years (957) | 18 | 7 | 57 | 18 |
| | 45+ years (513) | 7 | 7 | 76 | 10 |
| Ethnicity | White (1,800) | 16 | 6 | 60 | 19 |
| | Ethnic minority (137) | 31 | 9 | 44 | 15 |
| Length of time inc construction | <1 year (181) | 25 | 3 | 47 | 26 |
| | 1 to 2 years (207) | 18 | 2 | 57 | 24 |
| | 2 to 5 years (359) | 25 | 2 | 48 | 25 |
| | 5+ years (1,233) | 14 | 9 | 64 | 14 |
| Contract type | Employed directly (871) | 15 | 4 | 62 | 20 |
| | Self-employed (899) | 19 | 9 | 54 | 18 |
| | Agency (194) | 18 | 4 | 66 | 12 |
| Highest qualification level | No qualifications (579) | 16 | 2 | 64 | 18 |
| | Level 1 (193) | 25 | 3 | 56 | 17 |
| | Level 2 (637) | 17 | 8 | 58 | 17 |
| | Level 3 (315) | 13 | 8 | 60 | 19 |
| | Level 4+ (82) | 21 | 15 | 49 | 16 |
| *Unweighted bases in parentheses* | | | | | |

*Q9*

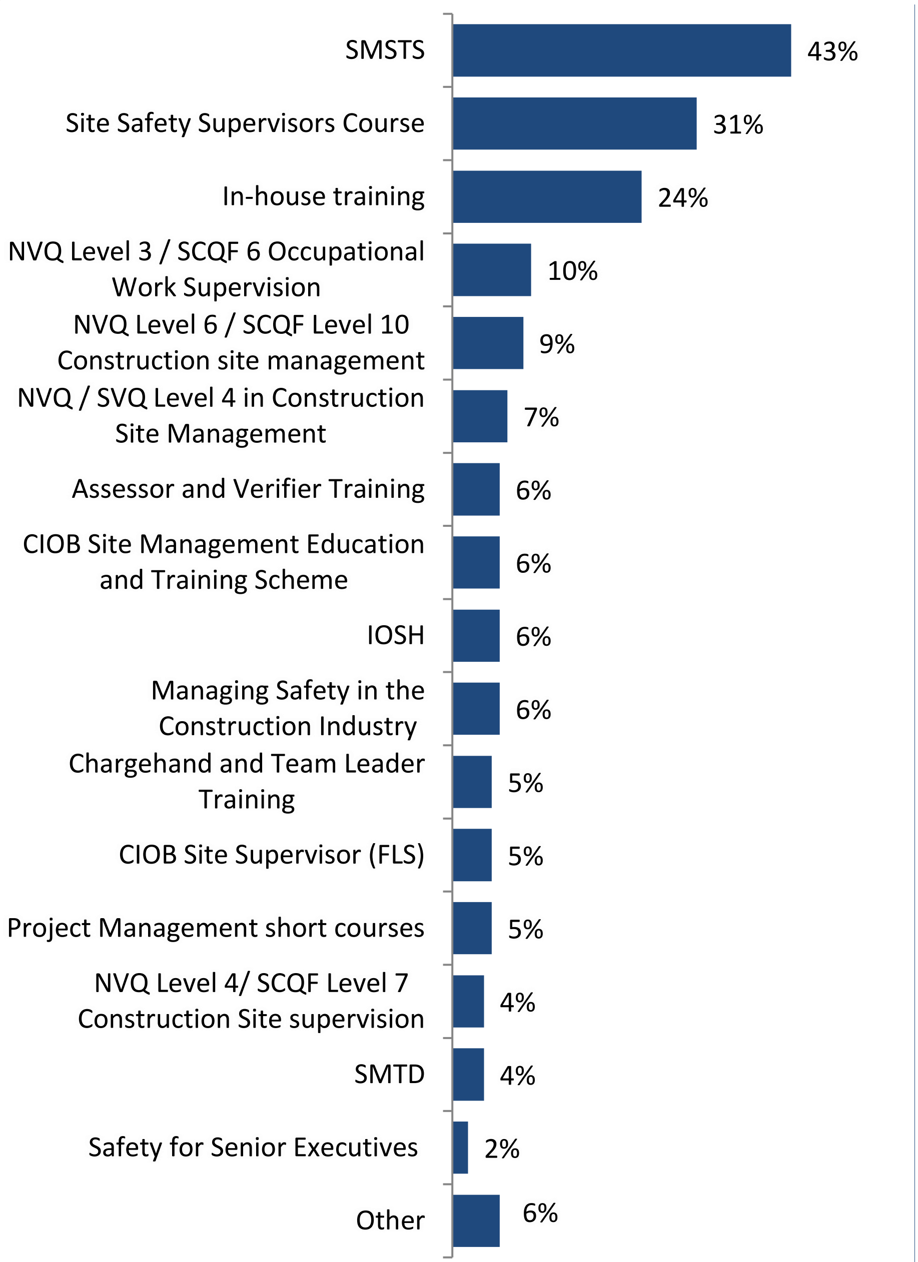
A third of all respondents (33% compared to 34% in 2018/19 and 25% in 2015) and four in five of those who have or have had some form of supervisory or management responsibilities (80% compared to 81% in 2018/19, 73% in 2015 and 71% in 2012) have received formal training designed to improve managerial or supervisory knowledge or skills.

The proportion that has undertaken any managerial or supervisory training increases to just over two in five construction workers aged 45 and over (41%, compared to 42% in 2018/19) and those with 5 or more years' experience of working in the construction sector (39%, compared to 41% in 2018/19). Virtually all site managers have received formal training designed to improve managerial or supervisory knowledge or skills (94%).

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned by those who have undertaken any training (43%), followed by Site Safety Supervisors Courses (31%) and in-house training (24%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

**Figure 39: Types of managerial/supervisory training undertaken**

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




*Q11. Unweighted base = 974*

## 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 40 below.

As in previous years, the vast majority of construction workers (96%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 4% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

A fifth of the workforce (19%) holds a skill card/certificate, but has no other construction qualification, which continues a downward trend since 2015 (30%) and 2018/19 (22%).

At 13%, the proportion of construction workers who are working towards a construction qualification is largely in line with 2018/19 (15%) and 2015 (12%).

**Figure 40: Qualification status summary**

*Base: All respondents*

| | 2022 % | 2018/19 % | 2015 % |
|---|---|---|---|
| Holds a formal construction qualification or a skills card/certificate or working towards a qualification | 96 | 99 | 98 |
| Holds a formal construction qualification or a skills card/certificate | 96 | 98 | 97 |
| Holds a skills card/certificate | 93 | 97 | 96 |
| Holds a skills card/certification but no other qualification | 19 | 22 | 30 |
| Working towards a qualification | 13 | 15 | 12 |
| None of the above | 4 | 1 | 2 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* |

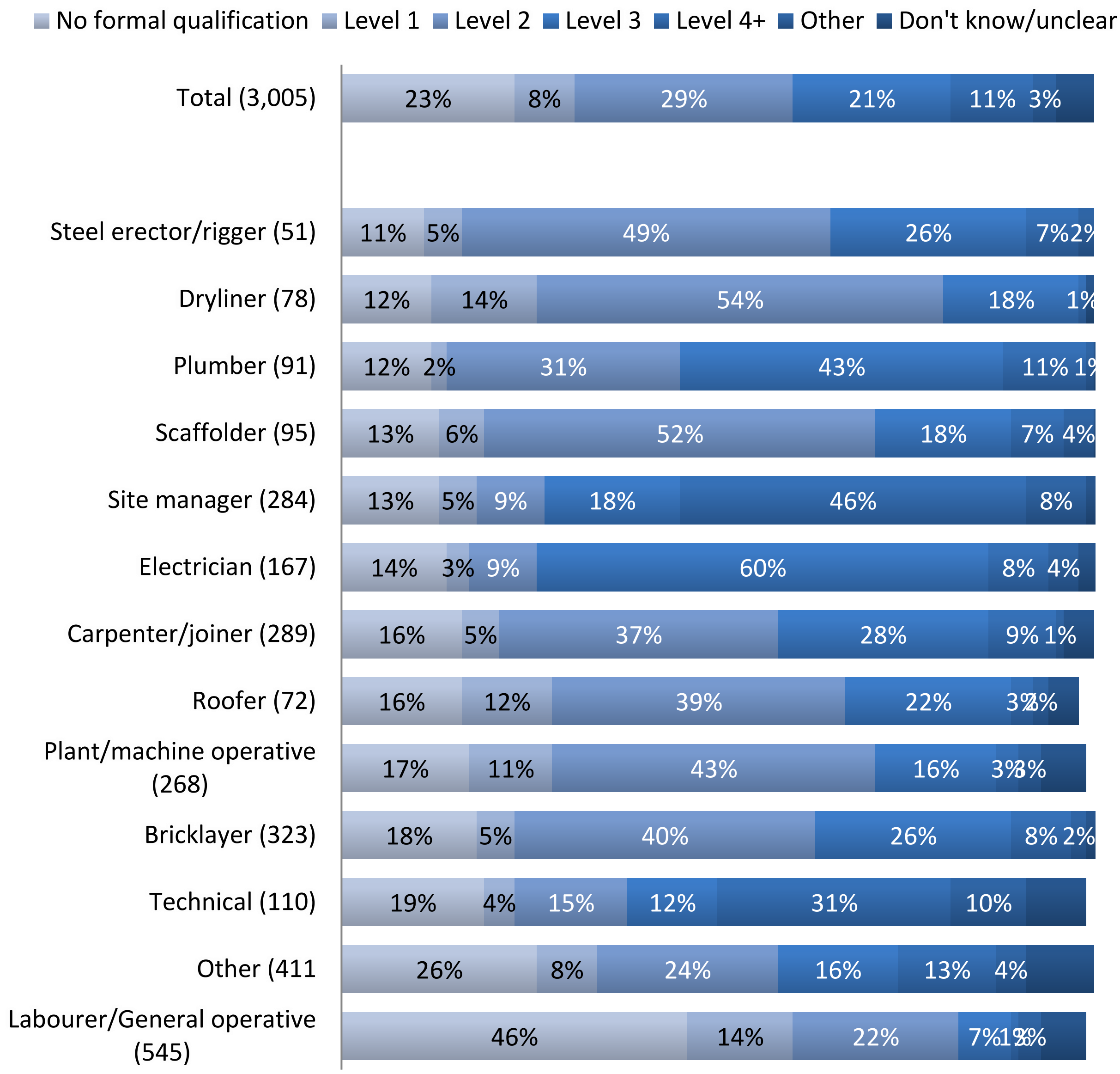
Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level, and Figure 41 summarises construction workers' highest level of qualification, overall and by occupation.

Overall, around three-fifths (61%) have qualifications equivalent to Level 2 or above (compared to 59% in 2018/19 and 58% in 2015).

By occupation, site managers are most likely to hold the highest level of qualifications. Close to half (46%) hold qualifications at Level 4 or above (compared to 39% in 2018/19), and one in five (18%) have Level 3 qualifications. Electricians and plumbers are also more likely than other occupations to hold qualifications equivalent to Level 3 or above (67% and 64% respectively).

**Figure 41: Current qualification level, by occupation**

*Base: All respondents who provided a valid response*




*Q15/Q16. Unweighted bases in parentheses*

## 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. It should be noted that the code frame used for responses in 2012 was slightly different.

The pattern of results is similar to that seen in 2018/19, with close to half (47%) saying it was because their employer sent them there (compared to 51% in 2018/19), and a similar proportion (46%) saying it was because they grew up there/have always lived there (compared to 43% in 2018/19).

Across the different age groups the key difference remains that those aged 25 to 44 are somewhat more likely than average to say their employer sent them there (51%) and less likely to say they grew up there (42%).

There are significant differences by ethnicity, with 55% of Workers from an ethnic minority group saying their employer sent them there, as compared to 47% of White workers, and 22% saying they grew up there, as compared to 48% of White respondents.

**Figure 42: Reasons for choosing to work in current location – prompted, multiple response**

*Base: All respondents*

<table>
<tr><th></th><th>2022<br>%</th><th>2018/19<br>%</th><th>2015<br>%</th><th></th><th>2012<br>%</th></tr>
<tr><td>Employer sent you here</td><td>47</td><td>51</td><td>36</td><td>Employer sent me</td><td>40</td></tr>
<tr><td>You grew up here/have always lived here</td><td>46</td><td>43</td><td>55</td><td rowspan="2">Family</td><td rowspan="2">42</td></tr>
<tr><td>Family reasons</td><td>5</td><td>5</td><td>6</td></tr>
<tr><td>Came to the area to take up this or another job</td><td>5</td><td>3</td><td>5</td><td>More regular opportunities</td><td>10</td></tr>
<tr><td>Construction work is better paid in this area</td><td>4</td><td>3</td><td>3</td><td>Better paid jobs</td><td>5</td></tr>
<tr><td>There are more jobs available in this area</td><td>3</td><td>5</td><td>6</td><td>More jobs here</td><td>12</td></tr>
<tr><td>Wanted to move to the area because you like it or feel it offers opportunities for better quality of life</td><td>1</td><td>2</td><td>1</td><td>Prefer living here</td><td>10</td></tr>
<tr><td>Better promotional prospects in this area</td><td>1</td><td>1</td><td>1</td><td>More chance of promotion</td><td>1</td></tr>
<tr><td>Unweighted bases</td><td>3,005</td><td>4,048</td><td>4,771</td><td></td><td>4,933</td></tr>
</table>

*Q28*

There are also significant differences by region/nation in the proportions that give these two main reasons for working in their current location. Workers in Northern Ireland (92%), the North East (76%) and the South West (59%) are most likely to say they work in their current region/nation because they have always lived there/grew up there, compared with 24% of those based in London, 33% of those based in the East Midlands, and 38% of those in Wales. With regard to being sent by their employer, this is particularly prevalent among those based in the North West (68%), Wales (55%) and the West Midlands (54%).

Those based in London are more likely to mention other reasons, such as better pay (11%), family reasons (9%), availability of jobs (8%) and a better quality of life (4%).

**Figure 43: Top two reasons for deciding to work in their current region/nation, by region/nation**

*Base: All respondents*


*Q28. Unweighted bases in parentheses*

There has been an increase in the proportion of workers who have worked within their current region for their entire career, from 44% in 2018/19 and 2015, to 49% in 2022, and a corresponding decrease in the proportion who have only spent a small proportion of their time in their current region, from 10% in 2018/19 to 5% in 2022.

Consequently, in 2022, a greater majority (83%) have spent all or most of their career in their current region than has been the case previously (77% in 2018/19, 80% in 2015 and 69% in 2012).

**Figure 44: Proportion of construction workers' career worked in current region/nation**

*Base: All respondents*

| | 2022 % | 2018/19 % | 2015 % | 2012 % |
|---|---|---|---|---|
| All of your time | 49 | 44 | 44 | 33 |
| Most of it | 34 | 33 | 36 | 36 |
| Around half your time | 8 | 9 | 8 | 12 |
| A small proportion of your time | 5 | 10 | 7 | 14 |
| Only on this job (this is the first site you've been to in this region/nation) | 1 | 2 | 3 | 3 |
| Don't know | 3 | 1 | 2 | 2 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *4,933* |

*Q26/Q27*

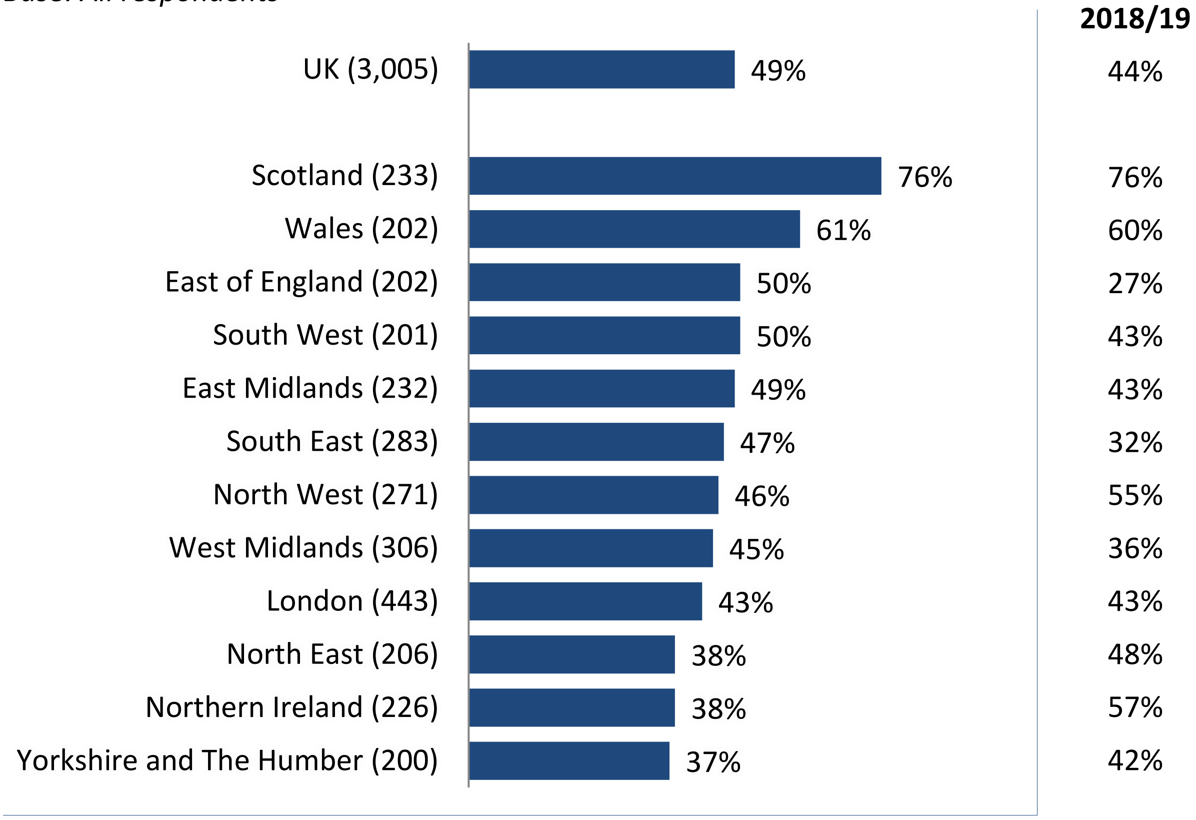
Unsurprisingly the proportion of workers who have spent all of their time in the current region/nation reduces with age, from 60% of those aged 16 to 24 to 46% of those aged 25 or over. However the proportion of 16 to 24 year olds who have spent their entire career in their current region has reduced since 2018/19, where 81% of this age group reported this. It is also higher among White workers (50%) than Workers from an ethnic minority group (40%).

There are also some quite significant variations again by region/nation, with those based in Scotland (76%) and Wales (61%) most likely to say they have spent all their time in this current region/nation, as was the case in 2018/19.

However there have been some movement since 2018/19, with increases in the East of England (from 27% to 50%), the South East (from 32% to 47%) and the West Midlands (from 36% to 45%), and decreases in Northern Ireland (from 57% to 38%), the North West (from 55% to 46%) and the North East (48% to 38%).

**Figure 45: Proportion of workers who have spent all their time in their current region/nation, 2022 compared with 2018/2019**

*Base: All respondents*




*Q26/Q27. Unweighted bases in parentheses*

In terms of the regions/nations in which workers' current employers operate, overall, three quarters (73%) of workers report that their employer operates on a national basis (i.e. UK-wide). This is more likely than average to be the case in Northern Ireland (100%), Scotland (96%), Yorkshire and Humber (88%) and the North East (85%), and less likely than average to be the case in London (55%), the South West (57%), Wales (66%) and the West Midlands (66%).

Workers in Northern Ireland are also more likely to report that their current employer works in other parts of Europe (22%, as compared to 2% for the UK as a whole, presumably reflecting employment in businesses which operate both in Northern Ireland and the Republic of Ireland).

There are a number of regions where relatively high proportions of workers report that their current employer operates in that region only: the South West (37%), London (36%), the West Midlands (30%) and the South East (24%). For the devolved nations, while 32% of workers in Wales report that their current employer operates only in Wales, this proportion reduces to 1% and 3% for Northern Ireland and Scotland respectively.

**Figure 46: Area of employer operations, compared with region/nation working in currently**

*Base: All respondents* **denotes less than 0.5%*

| **Region/nation employer operates in** | **Region/nation currently working in** | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **EM %** | **EE %** | **GL %** | **NE %** | **NW %** | **NI %** | **SC %** | **SE %** | **SW %** | **WA %** | **WM %** | **YH %** |
| East Midlands (EM) | 17 | 3 | * | 0 | 1 | * | 0 | 0 | 1 | * | 8 | 1 |
| East of England (EE) | 1 | 18 | 6 | 0 | 0 | * | 0 | 1 | 1 | * | 2 | 0 |
| London (GL) | * | 6 | 36 | 0 | 0 | 1 | 0 | 6 | 1 | 0 | 1 | 1 |
| North East (NE) | 1 | 0 | 1 | 11 | * | * | 0 | 0 | 1 | 0 | 1 | 0 |
| North West (NW) | * | * | 1 | * | 18 | * | 0 | * | 1 | * | 3 | 3 |
| South East (SE) | 0 | 3 | 11 | 0 | 0 | * | 0 | 24 | 1 | * | 2 | 0 |
| South West (SW) | 0 | * | 1 | 0 | 0 | * | 0 | 1 | 37 | 3 | 2 | 0 |
| West Midlands (WM) | 3 | * | 1 | 2 | 2 | * | 0 | 3 | 1 | 2 | 30 | 1 |
| Yorkshire & Humber (YH) | 3 | 1 | * | 1 | 1 | * | 0 | 1 | 1 | 0 | 2 | 9 |
| | | | | | | | | | | | | |
| Northern Ireland (NI) | 0 | 0 | * | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Scotland (SC) | * | * | * | 0 | 0 | 1 | 3 | 0 | 1 | 0 | 1 | 1 |
| Wales (WA) | 0 | * | 0 | 0 | * | 0 | 0 | * | 1 | 32 | 1 | 0 |
| | | | | | | | | | | | | |
| Nationally | 78 | 76 | 55 | 85 | 78 | 100 | 96 | 69 | 57 | 66 | 66 | 88 |
| Other parts of Europe | * | * | 5 | 0 | 1 | 22 | 1 | 2 | 1 | * | 0 | 0 |
| Outside of Europe | 1 | 0 | 1 | 0 | | 4 | * | 0 | * | 0 | 0 | 0 |
| Other / Unsure | 2 | 2 | 6 | 1 | 3 | 0 | 0 | 4 | 5 | 2 | 1 | 2 |
| *Unweighted bases* | *232* | *202* | *443* | *206* | *271* | *226* | *233* | *283* | *201* | *202* | *306* | *200* |

*Q25*

## 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 47 illustrates.

Workers in Scotland (98%), followed by those in the North East (87%), Northern Ireland (85%), the South West (84%), Wales (84%) and London (81%) are more likely than those in other regions to report their last site was in the same nation/region as they are working in now.

Those in the East Midlands are less likely to report this is the case (51%), with over one in ten of these workers having previously worked in Yorkshire and Humber (15%) or the West Midlands (13%).

**Figure 47 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 |
| *Unweighted Bases* | *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, nearly three-quarters of all construction workers were interviewed in the same region/nation in which they were living when they started their construction career (74% compared to 72% in 2018/19, 75% in 2015 and 66% in 2012). There are, however, considerable variations in the extent to which workers have remained in their original locality.

Nine in ten or more workers currently based in Scotland (96%), Northern Ireland (95%) and Wales (93%) have remained in the same region/nation in which they were based when they started their construction careers. This is also true for close to nine in ten of those in the North West (89%). The proportion for whom this is the case is lowest in the East Midlands, where over one in ten were previously living in Yorkshire and Humber (15%) and the West Midlands (13%).

**Figure 48: 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 |
| *Unweighted Bases* | *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

The majority of construction workers were interviewed on a site that was located within the same region/nation as their permanent home, but there was some variation as to whether this was the case by region/nation.

The pattern of results is somewhat different from that in previous iterations of the survey, where the South East 'imported' the greatest proportion of construction workers (45% in 2018/19), this year this proportion has fallen to 24%.

As has been the case in previous years, the devolved nations and South West import few workers, while London and the East of England 'import' the highest proportion of workers (28% and 29% respectively).

The extent to which workers are imported has reduced since 2018/19 in London (37% then), and the East of England (40% previously), and increased in the North East (19% compared to 4%) and the East Midlands (24% compared to 10%). As previously regions/nations predominantly import workers from neighbouring regions/nations.

**Figure 49: Inter-regional/national movement from permanent residence to current site**

*Base: All respondents who provided a valid response*

| | 2022 | | | 2018/19 | | | 2015 | | |
|---|---|---|---|---|---|---|---|---|---|
| | % from same region/ nation | % from neigh-bouring region/ nation | % from region/ nation further afield | % from same region/ nation | % from neigh-bouring region/ nation | % from region/ nation further afield | % from same region/ nation | % from neigh-bouring region/ nation | % from region/ nation further afield |
| Scotland (43) | 100 | 0 | 0 | 100 | 0 | 0 | 96 | 0 | 4 |
| Northern Ireland (208) | 100 | 0 | 00 | 100 | 0 | 0 | 99 | 0 | 1 |
| Wales (137) | 93 | 4 | 3 | 98 | 2 | 0 | 93 | 5 | 2 |
| South West (115) | 92 | 7 | 1 | 94 | 6 | 0 | 85 | 11 | 4 |
| Yorkshire and the Humber (115) | 87 | 10 | 3 | 88 | 9 | 3 | 86 | 14 | 0 |
| North West (161) | 88 | 10 | 2 | 94 | 6 | 0 | 88 | 12 | 0 |
| West Midlands (182) | 87 | 9 | 4 | 80 | 19 | 1 | 82 | 16 | 2 |
| North East (129) | 81 | 5 | 4 | 96 | 4 | 0 | 97 | 1 | 2 |
| South East (178) | 76 | 9 | 15 | 55 | 42 | 3 | 58 | 38 | 4 |
| East Midlands (140) | 76 | 22 | 2 | 90 | 10 | 0 | 74 | 23 | 3 |
| London (218) | 72 | 27 | 1 | 63 | 32 | 5 | 71 | 25 | 4 |
| East of England (125) | 71 | 25 | 4 | 60 | 36 | 4 | 63 | 27 | 0 |
| *Unweighted bases for 2022 in parentheses* | | | | | | | | | |

*Q52/Q54*

A detailed breakdown of workers' home regions/nations in relation to where their current work site is located is provided in Figure 50.

**Figure 50: Region/nation of current site in relation to current residence**

*Base: All respondents who provided a valid response    *denotes less than 0.5%*

| **Region/nation of current residence** | **Region/nation currently working in** | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **EM %** | **EE %** | **GL %** | **NE %** | **NW %** | **NI %** | **SC %** | **SE %** | **SW %** | **WA %** | **WM %** | **YH %** |
| East Midlands | 76 | 13 | 0 | 7 | 1 | 0 | 0 | 1 | 0 | 2 | 4 | 3 |
| East of England | 3 | 71 | 13 | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| London | 0 | 11 | 73 | 0 | 0 | 0 | 0 | 6 | 0 | 1 | 0 | 0 |
| North East | 1 | 0 | 0 | 81 | 1 | 0 | 0 | 1 | 1 | 0 | 0 | 0 |
| North West | 1 | 0 | * | 0 | 87 | 0 | 0 | 6 | 0 | 0 | 6 | 10 |
| Northern Ireland | 0 | 0 | 0 | 0 | 0 | 100 | 0 | 0 | 0 | 0 | 0 | 0 |
| Scotland | 0 | 0 | 0 | 0 | 0 | 0 | 100 | 0 | 0 | 0 | 0 | 0 |
| South East | 1 | 2 | 12 | 0 | 0 | 0 | 0 | 76 | 1 | 0 | 2 | 0 |
| South West | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 3 | 92 | 4 | 1 | 0 |
| Wales | 0 | 0 | * | 0 | 0 | 0 | 0 | 1 | 6 | 93 | 1 | 0 |
| West Midlands | 9 | 2 | 1 | 7 | 7 | 0 | 0 | 7 | 0 | 0 | 86 | 0 |
| Yorkshire and the Humber | 10 | 0 | 0 | 5 | 3 | * | 0 | 0 | 0 | 0 | 2 | 87 |
| *Unweighted bases* | *142* | *126* | *231* | *129* | *165* | *209* | *43* | *181* | *117* | *138* | *188* | *117* |

*Q52/Q54*

## Furthest distance worked in last 12 months

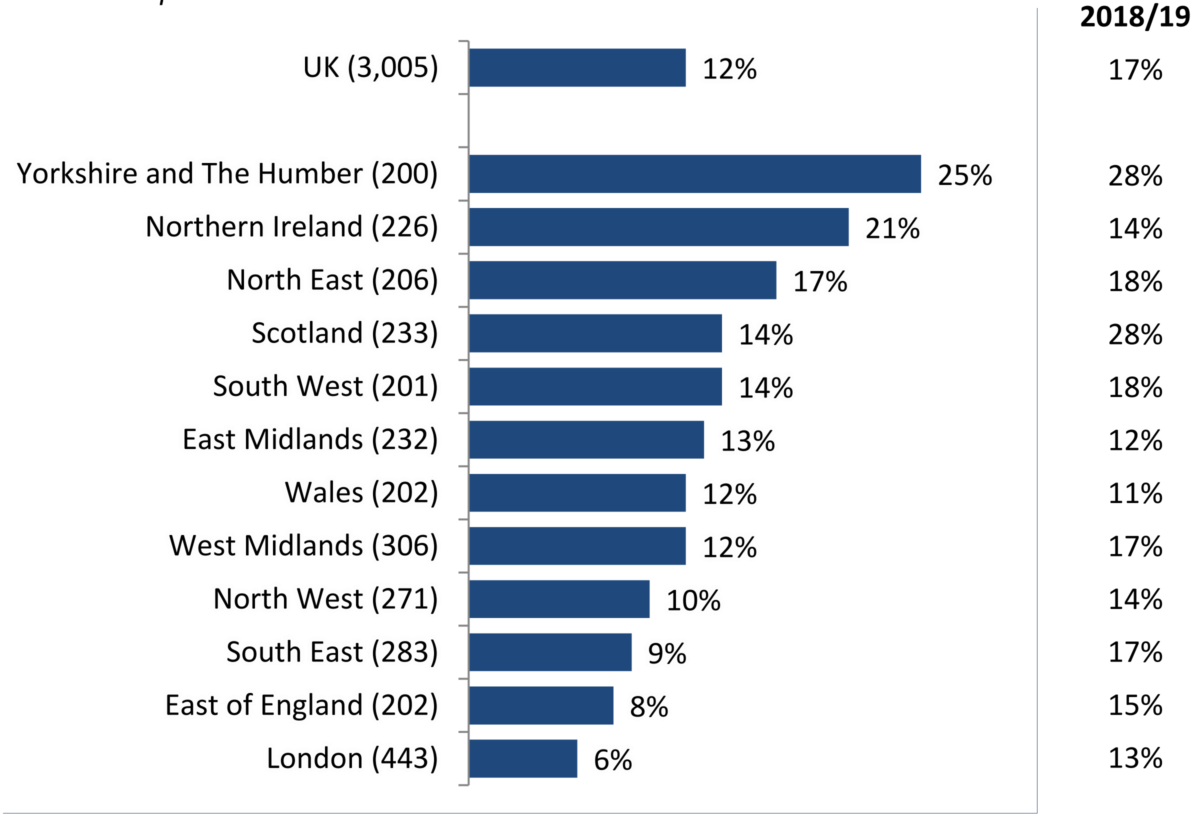
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. A third (33%) of all construction workers have worked no more than 20 miles away, a higher proportion than was the case previously (26% in 2018/19 and 20% in 2015). A further third (33%) have worked between 21 and 50 miles away, in line with previous years (32% in 2018/19 and 31% in 2015).

This leaves a third (32%) who have worked more than 50 miles away from their permanent or current home, lower than the 41% in 2018/19 and 47% in 2015. Within this, one in five (20%) have worked between 50 and 100 miles (compared to 24% in 2018/19 and 26% in 2015), and one in eight (12%) more than 100 miles (compared to 17% in 2018/19 and 21% in 2015).

Once again there are variations in this regard, with workers based in Yorkshire and Humber (25%) and Northern Ireland (21%) most likely to have travelled more than 100 miles from their permanent home to work in the last 12 months.

**Figure 51: Proportion of workers that have travelled more than 100 miles from their permanent home to work, in the last 12 months, by region/nation**

*Base: All respondents*




*Q29. Unweighted bases in parentheses*

## Use of temporary accommodation

Nationally, one in twenty (5%) construction workers reported that they were currently staying in temporary accommodation while working at their site, in line with previous years (5% in 2018/19, and 6% in 2015 and 2012). The proportion is highest amongst workers currently based in London (10%) and lowest in the Northern Ireland (1%).

Construction workers from ethnic minority groups are more likely than White workers to be living in temporary accommodation (12% compared to 4%).

**Figure 52: Percentage of workers in temporary accommodation**

*Base: All respondents*

| | **2022 %** | **2018/19 %** | **2015 %** |
|---|---|---|---|
| UK (3,005) | 5 | 5 | 6 |
| London (408) | 10 | 10 | 8 |
| South East (259) | 7 | 7 | 6 |
| Wales (184) | 7 | 3 | 4 |
| West Midlands (284) | 6 | 6 | 3 |
| East Midlands (220) | 6 | 3 | 5 |
| Scotland (209) | 6 | 2 | 7 |
| East of England (194) | 4 | 5 | 11 |
| South West (192) | 3 | 3 | 7 |
| North West (244) | 3 | 3 | 2 |
| Yorkshire and The Humber (192) | 3 | 3 | 4 |
| North East (192) | 2 | 1 | 4 |
| Northern Ireland (198) | 1 | 3 | 3 |
| *Unweighted bases for 2022 in parentheses* | | | |

*Q41*

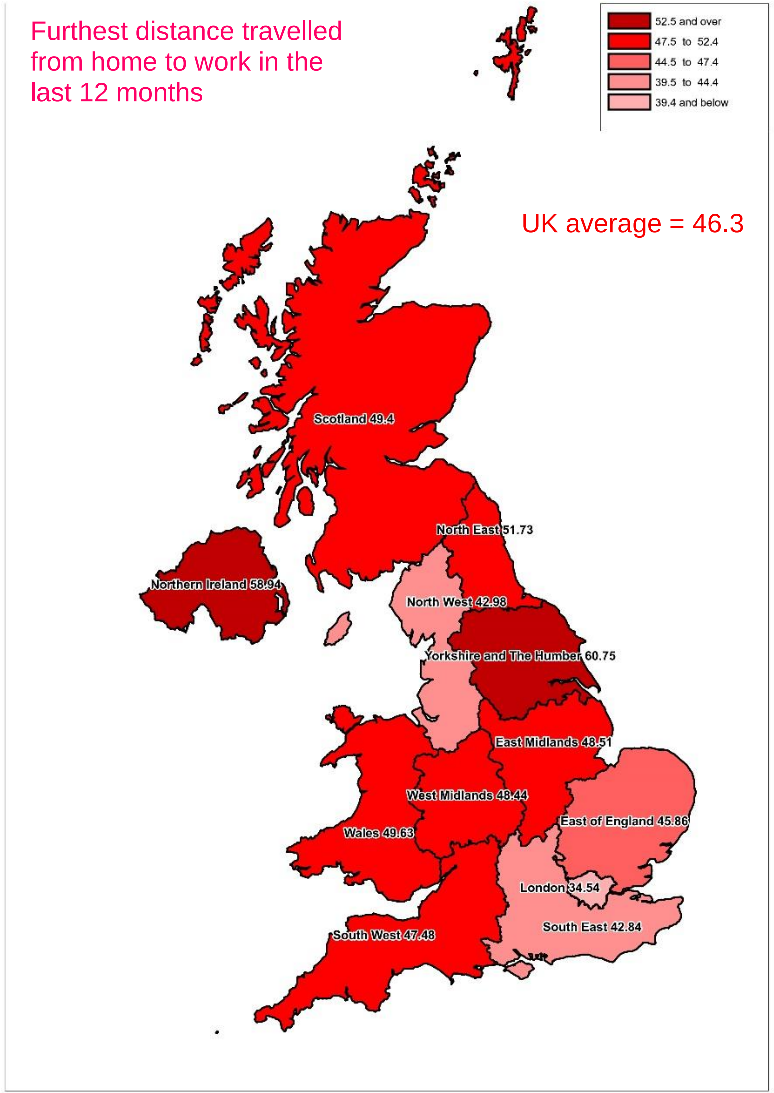
## Journey distance to work

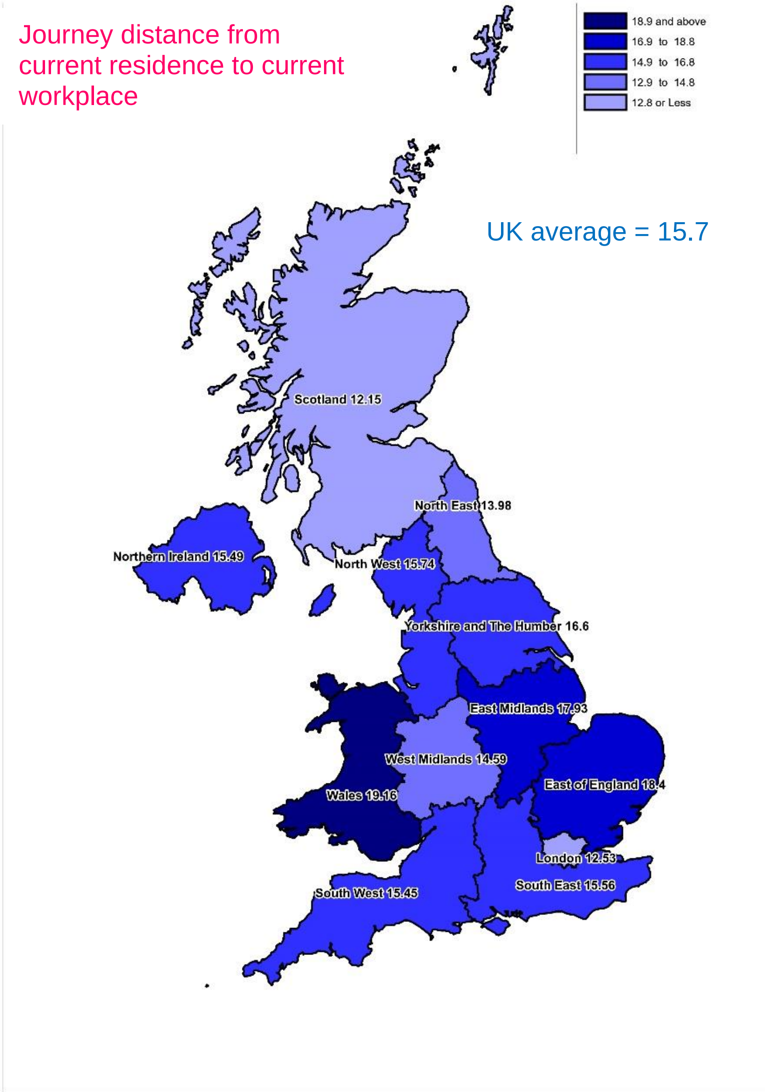
The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 17 miles, continuing the downward trend since the survey began (18 miles in 2018/19, 22 miles in 2015 and 28 miles in 2012).

Based on those workers that provided an estimate, two in five (41%) travel less than 10 miles from their current residence to the site where they work, in line with the 42% who did so in 2018/19. A quarter (27%) travel between 10 and 19 miles, and three in ten (30%) travel 20 to 49 miles. Again this is in line with 2018/19 (25%, 27% respectively).

Just 2% travel further than this, which is lower than the 6% who did so in 2018/19.

The average distance travelled is higher than average in the East Midlands, the East of England and the West Midlands (all 21 miles), and lower than average in Northern Ireland (9 miles), Yorkshire and Humber (10 miles) and London (14 miles).


Furthest distance travelled from home to work in the last 12 months
52.5 and over
47.5 to 52.4
44.5 to 47.4
39.5 to 44.4
39.4 and below
UK average = 46.3
Scotland 49.4
North East 51.73
Northern Ireland 58.94
North West 42.98
Yorkshire and The Humber 60.75
East Midlands 48.51
West Midlands 48.44
East of England 45.86
Wales 49.63
London 34.54
South East 42.84
South West 47.48


Journey distance from current residence to current workplace
18.9 and above
16.9 to 18.8
14.9 to 16.8
12.9 to 14.8
12.8 or Less
UK average = 15.7
Scotland 12.15
North East 13.98
Northern Ireland 15.49
North West 15.74
Yorkshire and The Humber 16.6
East Midlands 17.93
West Midlands 14.59
East of England 18.4
Wales 19.16
London 12.53
South East 15.56
South West 15.45

## Site duration and change

### Expected site/phase duration

All the workers who are currently employed on a temporary basis (29% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 7% that expect to work for another week or two or less; 6% expecting another 2 to 4 weeks; 10% between 1 and 3 months; 14% between 3 and 6 months; 20% between 6 months and a year, and 11% that expect to still be working for them for at least another year. In nearly a third (32%) of cases temporary workers did not know how much longer they could expect to be working for their current company/agency. This is down on the 38% in this situation in 2018/19.

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.

Over one in ten (12%) do not expect to work on that site for more than a month, which matches 2015 and 2012 levels following a peak in 2018/19 (14%).

Half (53%) of all workers anticipate being on site for more than a month but less than a year (in line with 51% in 2018/19), but more than one in ten (13%) expect to stay on that site for a year or longer, down on the 18% who did so in 2018/19, and the 26% who did so in 2015.

More workers in 2022 are not sure how much longer they could expect to be on site (22% compared to 16% in 2018/19, 24% in 2015 and 20% in 2012).

By region/nation, workers in Scotland and the North West (both 30%) are most likely to be unsure of how much longer they will be working at that site, while workers in Northern Ireland (2%) and Wales (14%) least likely to be unsure.

The youngest workers, aged 16-19 are also more likely to be unsure of how much longer they can expect to work on their present site (29% don't know).

Amongst the various trades/job roles, site managers (28%), scaffolders (20%) and technical staff (19%) are significantly more likely to indicate that they expect to work at that site for more than a year. This compares with around one in twenty steel erectors/riggers (2%), electricians (4%), roofers (5%) and plumbers (6%).

**Figure 53: Length of time workers expect to work at that specific site during current phase**

*Base: All respondents*

<table>
<tr><th></th><th>2022<br>%</th><th>2018/19<br>%</th><th>2015<br>%</th></tr>
<tr><td>Less than a week</td><td>2</td><td>4</td><td>4</td></tr>
<tr><td>1-2 weeks</td><td>3</td><td>4</td><td>2*</td></tr>
<tr><td>2-3 weeks</td><td>3</td><td>3</td><td>3*</td></tr>
<tr><td>3-4 weeks</td><td>4</td><td>3</td><td>3*</td></tr>
<tr><td>1-3 months</td><td>11</td><td>12</td><td rowspan="3">38</td></tr>
<tr><td>3-6 months</td><td>17</td><td>16</td></tr>
<tr><td>6-12 months</td><td>25</td><td>23</td></tr>
<tr><td>More than a year</td><td>13</td><td>18</td><td>26</td></tr>
<tr><td>Don’t know</td><td>22</td><td>16</td><td>24</td></tr>
<tr><td>Unweighted bases</td><td>3,005</td><td>4,048</td><td>4,771</td></tr>
</table>

*Q24 *wording is different; ‘about a week’/’about 2 weeks’/’about 3 weeks’*

## Expected next site location

While a majority (69%) of all construction workers 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 is significantly lower than the 84% who did so in 2018/19, and reverses an upward trend on this measure since 2015, returning to the level seen in 2012 (69%).

However, the proportion who are sure that this will not be the case has remained stable (5% compared to 4% in 2018/19), with an increase in those who say it depends where the work is, from 8% in 2018/19 to 20% in 2022. The remaining 6% do not know.

By region/nation the certainty that they will be able to commute daily from their permanent home to their next job ranges from 77% in Scotland and Yorkshire and Humber, and 76% in the East Midlands, down to 38% in Northern Ireland and 60% in the North West.

Confidence in this respect increases with age, from 59% of those age 16 to 19 to 80% of those aged 60 or over.

By trade/occupation, site managers are most confident (85%), while those working as labourers/general operatives are least sure in this regard (both 61%).

## 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.

New housing continues to be the most common type of construction work undertaken, by 78% (compared to 79% in 2018/19), followed by housing repair and maintenance (42% compared to 46% in 2018/19). At 39%, commercial work has fallen back to 2015 levels (35%) following an uplift in 2018/19 (51%).

Private industrial work such as factories, warehousing, mechanical engineering, land reclamation (35%), public non-housing work such as schools, sports facilities, landscaping (32%) and infrastructure building projects (23%) have all seen declines since 2018/19 (45%, 51% and 31% respectively), placing them more in line with the 2015 results (30%, 33% and 21% respectively).

Reflecting these results, there has been an increase in the proportion of workers who have only worked in one type of construction, from 30% in 2018/19 to 42% this year, again more in line with 2015 (48%).

**Figure 54: Type of projects on which workers have spent significant periods of time**
**Base: All respondents**

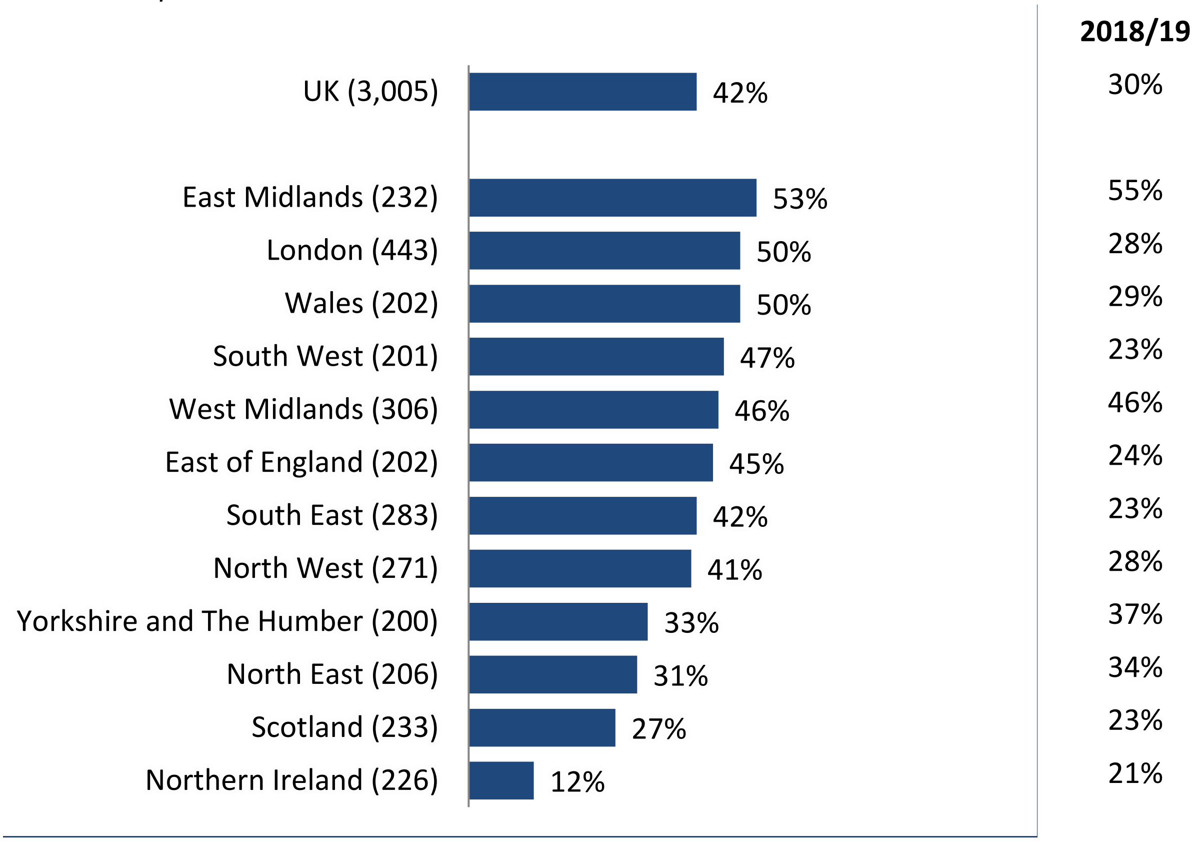
| | 2022 % | 2018/19 % | 2015 % | 2012 % |
|---|---|---|---|---|
| New housing | 78 | 79 | 83 | 72 |
| Housing repair and maintenance including extensions/loft conversions | 42 | 46 | 36 | 47 |
| Commercial work such as shops, office, pubs etc | 39 | 51 | 35 | 55 |
| Private industrial work such as factories, warehousing, mechanical engineering, land reclamation | 35 | 45 | 30 | 51 |
| Public non-housing work such as schools, sports facilities, landscaping | 32 | 51 | 33 | 59 |
| Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations | 23 | 31 | 21 | 38 |
| Off-site manufacturing | 6 | Na | Na | Na |
| ONE TYPE ONLY | 42 | 30 | 48 | 24 |
| TWO TYPES | 17 | 16 | 14 | 17 |
| THREE TYPES | 13 | 14 | 11 | 15 |
| FOUR TYPES | 9 | 12 | 8 | 13 |
| FIVE TYPES | 9 | 13 | 9 | 15 |
| SIX TYPES | 6 | 14 | 9 | 15 |
| *Unweighted bases* | *3,005* | *4,048* | *4,771* | *4,993* |

*Q4*

The number of project types worked on varies significantly by region/nation. More than half of workers in the East Midlands (53%) and half of those in London and Wales (both 50%) have only worked on one type, compared with 12% in Northern Ireland, and around three in ten in Scotland (27%), the North East (31%) and Yorkshire and Humber (33%).

There have been increases since 2018/19 in the proportion of workers who have only worked on one project type in all regions/nations apart from the East Midlands, the West Midlands, Yorkshire and Humber, the North East and Scotland, where levels are relatively stable. Northern Ireland is the only other exception, where the proportion working on only one type of project has reduced from 21% in 2018/19 to 12% this year.

**Figure 55: Proportion of workers that have only worked on one project type**
*Base: All respondents*




*Q4. Unweighted bases in parentheses*

The likelihood that workers have worked only on one project type declines as age increases, as one would expect (from 71% of 16 to 19 year olds to 34% of 45+ year olds).

By current trade/occupation, those workers most likely to have only worked on one project type include labourer/general operatives (40%), bricklayers (38%) and technical staff (38%), while painter/decorators (16%) and electricians (16%) are least likely. Scaffolders (31%), plant/machine operatives (20%) and site managers (18%) are most likely to have worked on all six project types.

**Figure 56: Number of sub-sectors worked in, by occupation**

*Base: All respondents*

| | 1 type % | 2 types % | 3 types % | 4 types % | 5 types % | 6 types % |
|---|---|---|---|---|---|---|
| Dryliner (78) | 51 | 21 | 8 | 8 | 7 | 3 |
| Labourer/General operative (545) | 49 | 24 | 13 | 7 | 3 | 2 |
| Bricklayer (323) | 43 | 18 | 13 | 7 | 10 | 7 |
| Other (411) | 43 | 15 | 12 | 10 | 9 | 7 |
| Roofer (72) | 42 | 16 | 10 | 11 | 20 | 0 |
| Scaffolder (95) | 42 | 11 | 8 | 7 | 13 | 11 |
| Plant/machine operative (268) | 41 | 12 | 15 | 10 | 10 | 11 |
| Plumber (91) | 41 | 18 | 16 | 7 | 13 | 3 |
| Technical (110) | 40 | 25 | 10 | 7 | 9 | 4 |
| Electrician (167) | 39 | 16 | 15 | 11 | 10 | 7 |
| Carpenter/joiner (289) | 37 | 15 | 12 | 12 | 10 | 9 |
| Site manager (284) | 37 | 18 | 13 | 8 | 13 | 6 |
| Steel erector/rigger (51) | 20 | 8 | 5 | 22 | 28 | 10 |
| *Unweighted bases in parentheses* | | | | | | |

*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. Over four in five (43%) believe they definitely will want to be working in construction, a decline on the 48% who did so in 2018/19. A further quarter (27%, compared with 26% in 2018/19) believe it is very likely. Overall, 82% believe it is likely to some degree, somewhat lower than 2018/19 (86%).

Under one in ten construction workers consider it unlikely (7%), with just 2% saying they definitely will not be and a further 4% hoping to be retired by then. One in twenty (6%) do not know.

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 45% believe they will definitely want to be working in the construction sector, 28% believe it is very likely they will want to be working in the construction sector, and 13% % believe it is quite likely they will want to be working in the construction sector. Overall, 86% of this group are likely to some degree to want to be working in the sector, much in line with the 88% who did so in 2018/19.

Only 7% think on any level of likelihood that they will not want to be working in the construction sector in 5 years' time and this proportion is the same as reported in 2018/19 and 2015.

# Commentary on findings

## Methodological points

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

First, some methodological points apply.

As noted in the report's introduction, 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. In the discussion below, thus, some interpretative observations on the data are made which extend beyond the data itself. Manifestly, such observations will have greater or lesser justification and readers with knowledge of the industry will, of course, apply their own knowledge and experience in considering particular findings.

## The UK construction industry

Beyond these methodological points, given the significance of the industry environment in interpreting survey findings, it is additionally observed that the industry is not in a particularly dynamic phase.

Industry output in value terms (ONS figures) took a sharp dip in the worst months of the Covid pandemic but then experienced a very sharp recovery from April to June 2021 since when more steady growth has occurred to a point where output is broadly at its pre-pandemic level.

A low growth scenario for the near future is anticipated especially in circumstances where a national recession, albeit not long nor deep, is forecast by the Bank of England. 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).

However, despite this replacement demand, as new entrants replace retirees and other leavers, a substantial proportion of industry workers, as surveyed here, still comprise individuals who have been in the industry for lengthy periods. The survey showed that, as in previous editions, around 70% of workers have worked in the industry for 5 years or more. They were available to survey certainly in the last 2018/19 edition and in many cases to editions before that. And, of course, in their demographic and many other characteristics they supply information which remains constant. This stability is likely to continue as only 11% of workers do not expect to be in the workforce in 5 years' time (although, of course, any severe recession might force involuntary exit from the industry which cannot be foreseen by these respondents).

This factor builds a degree of inertia into measures of change over time in so far as some change, for example in the demography of the workforce, can occur only at the margin. Even if, say, the percentage of female or ethnic minority entrants had doubled between the two most recent surveys, from their relatively small bases this would have only a minor effect on the overall structure of the workforce.

### Stability in the workforce

In this wider picture, of recent and forecast relative stasis in the overall construction environment, a number of survey findings consistent with the picture are evident.

Thus, the survey observed fairly obviously that the structure of the workforce remains 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 a long 'tail', in the descriptive graph, 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. In other words, the process of occupational change does not reflect some major movement such that it markedly increases or decreases the size of occupational groups and hence does not substantially disturb the general occupational profile.

One exception to this is that there are substantially more individuals in the sample working now as site manager than were evident in the profile of previous occupations of the sample.

And, where individuals aspire to a different future occupation (itself infrequent as only 7% of workers want to change their occupation), that future occupation is most often that of site manager, or, for labourers and general operatives, a specific trade. In short, there is a degree of natural ambition in the sector for advancement but not one or more strong inter-trade trends which might, as above, reflect more fundamental change in the level of demand for one or more trades.

Thus, while developments in industry technology and materials have been widely adopted, it seems that these are more likely to have changed practices *within* trades rather than greatly affecting industry demand for each trade in itself. It does not seem, for example, that a comparable circumstance to that in which technology in mechanical engineering has greatly reduced occupations such as tool setter or lathe operator (in their manual forms) has yet arisen in construction.

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.

### Some indicators of change

Whilst a broad message from the survey is, thus, that some important indicators of workforce structure and development, as above, indicate stability, other findings point to a range of changes.

Since 2015 and 2018/19 surveys, the proportion of direct employees in the workforces has decreased while self-employment, always strong in the sector, and agency employment have increased. The survey does not identify whether this is a positive factor, reflecting increased flexibility and cost control for employers and increased independence for workers or a negative one reflecting greater uncertainty and insecurity in the industry. Inferentially, one consequence may be that the average level of participation in training, historically likely to be lower in indirect elements of the workforce, across the industry as a whole may be somewhat more difficult to stimulate.

Where entrants to the industry have previously been employed in another sector, the proportion entering from a previous background in manufacturing appears to have declined very substantially. This may say something more about the UK manufacturing sector than about construction in so far as the former sector now has fewer employees overall than hitherto and those employees are increasingly concentrated in skilled and technical jobs. The capacity for shake-out into construction may be lesser as a result. Recruits now more often come from the retail and wholesale and accommodation and hospitality sectors. Previous occupations, too, have changed with increases in recruits previously employed in lower-level service sector jobs and in sales and customer services.

Speculatively, such changes may imply a greater induction and retention challenge for the industry on the premise that the distance from manual work in a production environment to construction is shorter than the distance from a service environment to construction.

As an aside to this speculation, the movement of people previously in managerial or professional jobs into construction also appears to have declined sharply since 2018/19. Whether or not the ‘posh plumber’ phenomenon, people in nominally ‘good’ white collar jobs enticed by high wages into some construction trades and the subject of media attention, was ever a significant industry factor, it would seem to be much less so now.

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 24% to 19%. The change is not huge but, assuming it is not an artefact of survey sampling, 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.

Or, the survey also identified that fewer workers are travelling long distances to work. For example, 32% had worked more than 50 miles from home in the last year, compared with 41% in 2018/19 and 47% in 2015. The average travel distance to work was 17 miles in 2022 but 22 miles in 2018/19 and 28 miles in 2015. In so far as travel time is associated with working hours, it may simply be that shorter working hours simply reflects less travel time.

The survey also suggests some changes related to qualifications and certification.

Somewhat negatively, the study suggests that the proportion of workers holding industry Skills Cards, while still high, has fallen somewhat since 2018/19, from 97% to 93%. The survey does not provide a clear explanation for this but data shows somewhat more pronounced falls amongst younger workers in their first two years in the industry and for immigrant workers. In this light, one possibility is that the recent ‘Covid’ period slowed the processes for certification for recent industry entrants.

One striking and potentially more positive finding is that many fewer workers now say that they had no formal qualifications before entering the industry. Thus, overall, fewer than half (47%) say they had no formal qualifications when they first started working in construction, a significantly lower proportion than the 72% who reported this in 2018/19 and the 75% who reported this in 2015.

To a degree, in line with the initial discussion at the start of this final section of the report, sample variation may have exaggerated this finding. More substantively, a number of factors may be in play.

A significant number of workers have left the sector during the past three years and, with continuing skills shortage affecting the industry (as shown in numerous surveys independent of this one), the challenge of recruiting workers may be leading to labour hoarding whereby skilled workers who have come though formal construction training routes into the industry are retained while less qualified staff are let go.

Age, too, may be a factor such that older workers are more likely to have left the sector over the past two or three years. These workers are more likely to have originally come into the sector through informal routes such as labouring and informal apprenticeships and at a time when school leaving without any qualification was much more frequent.

A better qualified workforce is, of course, a major industry ambition. However, a question arises as to how far, in respect of the last point above, 'possession of a qualification' which may in some cases only be a qualification held on leaving school, irrespective of its subject or level, is a significant indicator of the quality of entry to the industry. Many surveys, such as the national Employer Skills Survey, have pointed to some employer dissatisfaction, including in construction, with young school leavers' skills and employability levels. And, in this survey, a quarter of respondents in the 16 to 19 year old group themselves reported that they would like assistance with their basic skills, including reading, basic mathematics, and so on.

In an industry moving, in line with other sectors, towards a more technical and technology-based future, albeit that traditional skills and trades remain crucial to much industry output, the challenge to the industry of obtaining and developing skills at a level and with a specification much higher than 'having a qualification' is obviously a critical one.

### Construction in London

In its consideration of geographical variation in survey findings, it was particularly noted that London stood out in several respects:

- At 19% the London workforce has three times the UK average proportion of non-white staff
- At 30% the London workforce has three times the UK average proportion of staff born in European Union countries
- At 29% the London workforce has three times the UK average proportion of staff born in other foreign countries
- At 38% the London workforce has fewer directly employed staff than the UK average (43%)
- At 51% the London workforce has more self-employed staff than the UK average 42%)
- At 33% the London workforce has more workers who work more than 50 hours per week than the UK average (19%)

- At 6% the London workforce has fewer staff who travelled more than one hundred miles to work in the last year than the UK average (12%)

Overall, these indicators identify London as still having a magnetic effect in respect of construction employment, drawing in workers from many other nations, offering longer working hours, most frequently with self-employed or agency status, with sufficient work available for workers not to need to travel beyond the region’s boundaries.

Other statistics also reveal that this ‘London’ phenomenon also interacts, as would be expected from the immigrant labour indicators above, with industry’s diversity concerns in that non-white workers are more likely than white workers to not be directly employed, to work via agencies, and to work 50 or more hours.

From an overall industry point of view, it is evident that the market supports this evidently more fluid, even dynamic, labour market in the capital and its hinterland but the industry must also concern itself with verifying, maintaining, and expanding the capability of a workforce which very frequently has a base of previous development and experience outside of UK.

One simple aspect of this is the substantial latent demand for basic skills training such that one third of workers in London report in the survey that they would benefit from training in speaking English.

The other side of reliance on the skills of immigrant labour to meet construction demand, assuming that those skills are generally sufficient, is, of course, the depressive effect which this may have on the level of entry to the industry of UK-born young people and on the industry’s career ladder if employers can avoid the complexities and costs of training and development simply by importing ‘ready-made- workers from overseas.

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