

Workforce Mobility and Skills in the UK Construction Sector 2018/19

London Report - April 2019





Study prepared by BMG Research from a commission by CITB.

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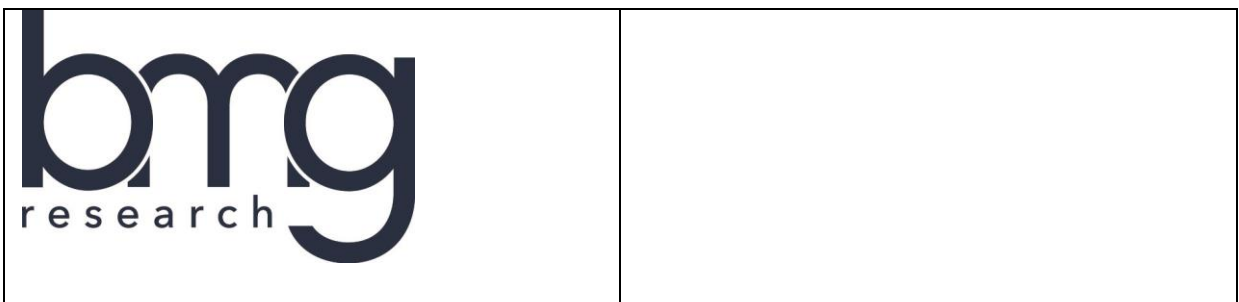




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Executive summary

Introduction

- CITB commissioned BMG Research to undertake the 2018/19 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 4048 construction workers undertaking manual roles on sites across the UK and 375 interviews were conducted with construction workers in the London region.

Profile of the sample

- All but 4% of construction workers are male. Half the construction workers interviewed in London are aged under 35 (49%), which is a higher proportion than in the general UK 16-64 years' workforce as a whole (36%), and higher than the UK average¹ in the survey (45%). Just 3% of construction workers are aged 60 or over.
- Overall 15% of the London construction workforce is of BME ethnic origin, compared with a higher incidence of 40% in the London 16-64 years' population as a whole. The UK average in the survey is 6% (compared with 15% of the UK 16-64 years' population as a whole).
- By trade/occupation, the highest proportion of the London sample is accounted for by site managers (17%), followed by labourers/general operatives (12%), carpenters/joiners (10%) and technical workers (9%).
- Almost half of all those interviewed in London perform a supervisory or management role on their site (45%); a higher proportion than in 2015 (28%) and compared to the UK average in 2018/19 (30%).
- Two-fifths of construction workers interviewed for the survey in London are employed directly by a company (43%), which is a lower proportion than the UK average (of 49%). Almost half of workers in London are self-employed (47%) and this is a higher proportion than the UK average (of 43%). Since 2015 there has been an increase in the proportion that are directly employed (from 39% in 2015) and a decrease in the proportion that are self-employed (from 51% in 2015). Just 10% of construction workers in London work for an agency, which compares with 7% nationally and 9% within London in 2015.
- One in three of all construction workers in London (35%) are employed on a temporary, rather than permanent basis. This is a higher proportion than the UK average (28%). By occupation the proportion is highest amongst labourers/general operatives (44%) and lowest amongst site managers (19%).
- Similarly to the UK average, nearly three-fifths of construction workers in London work between 40 and 49 hours per week (57%, compared with a UK average of 60%), and 2 in 5 work 50 or more hours per week (39%), which is above the UK average (23%).

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



Work history

Time in the sector

- A fifth of all London construction workers have worked in the industry for at least 20 years (22%), which compares with a higher UK average (32%). Around half have done so for 10+ years (51%).
- Nearly two-thirds of construction workers in London have only ever worked within the construction industry (63%), lower than in 2015 (67%), and lower than the UK average (67%). More than half of London's construction workers (56%) have worked in the sector pretty much continuously, without spells out of work and this is the same proportion as that across the UK (56%).

Previous non-construction jobs

- Amongst the 1 in 3 construction workers in London that worked in another sector before starting work in construction (30% of all respondents). The sector worked in beforehand is most likely to have been manufacturing (38%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trades occupations (31%).

Occupational switching within the construction sector

- Just under half of all construction workers in London (44%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is higher than in 2015 (36%) and compared to the UK average in 2018/19 (36%). The proportion that have worked in more than one role is higher amongst those with Level 4+ qualifications (57%) and those in a supervisory or management role (51%).
- Workers are most likely to have previously worked as a labourer/general operative (37%); while 1 in 5 have worked as a carpenter/joiner (20%).
- Thinking about their future plans in the construction sector, 7 in 10 construction workers in London would like to carry on in the same trade or occupation (73%), while 15% would like to change their trade/occupation and less than 1 in 20 would like to leave construction altogether (3%). The proportion that wants to carry on as they are is significantly lower in London than the UK average (80%).
- The most popular occupation that construction workers in London would like to change to is site manager (21% of those who would like to change).
- Four-fifths of construction workers in London that would like to change trade/occupation (81%) believe they will require further training or qualifications in order to do so. This is a lower proportion than the UK average (87%).
- The main reason for wanting to change trade/occupation is the belief that workers will be better paid (70%), followed by the opportunity to use their skills/abilities better (42%), while a third want more responsibility or more interesting work (35% in each case).



Qualifications and skills

Skills cards/certificates

- Most construction workers in London, as across the UK as a whole, hold some form of construction skill card or certificate (98% cf. 98% in 2015, 96% in 2012 and a UK average in 2018/19 of 97%).
- Those who have worked in construction for less than a year (91%) remain less likely to hold a skill card/certificate.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (87% in London; 85% across the UK).
- Card colours vary by age and particularly by occupation; younger workers are more likely to hold Red Trainee cards (16% of 16 to 24 year olds with a CSCS card); labourers/general operatives are most likely to hold Green cards (79%); and carpenters/joiners (62%) are most likely to hold Blue cards.

Construction-specific qualifications

- Seventy per cent of construction workers in London say they had no formal qualifications when they first started working in the construction industry. This compares with a slightly higher UK average (72%).
- By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst electricians (81%) and lowest among technical workers (46%).
- Compared with three in ten construction workers in London that did have qualifications when they first started working in construction (30%), overall, nearly three quarters of all construction workers in the region reported holding some sort of construction related qualification at the time of interview (74%, compared with 52% in 2015 and a UK average in 2018/19 of 72%).
- Within London, the proportion of workers that currently hold any qualifications is higher than average amongst workers who have worked in construction for less than a year (41%).
- By trade/occupation proportions vary from the majority of site managers (90%), and electricians (81%) down to just three in five labourers/general operatives (58%).
- The qualifications most likely to be held by construction workers in London are NVQ/SVQ qualifications (51% of those with qualifications) while less than 1 in 10 construction workers in the region with qualifications hold City & Guilds qualifications (8%). Just 5% of construction workers with qualifications now hold an apprenticeship.

Basic skill needs

- One in five construction workers in London believe they would benefit from some form of training in basic skills (19%), which is a smaller proportion to previous years (26% in both 2015 and 2012) but higher than the UK average in 2018/19 (11%).



- In terms of the type of training required there is an almost even split across reading, writing, and maths. Speaking English is the most frequently cited (14%).

Current study for qualifications

- One in five construction workers in London are currently working towards formal qualifications relevant to the construction industry (19% cf. 14% in 2015, 12% in 2012 and a UK average in 2018/19 of 15%). This proportion is significantly higher amongst 16-24 year olds (35%) and amongst those who have worked within the construction industry for less than 1 year (45%).
- Amongst workers with no qualifications 29% are currently working towards a qualification.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role more than a third are certain that they would not like to do so (35%), a lower proportion than across the UK (51%), while almost half would like to do so (49%) and a sixth are unsure (16%).
- Just under half of all construction workers in London (46%) and the majority of those who have had some form of supervisory or management responsibilities (85%) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions are higher than the UK average (34% and 81% respectively). However, it is important to note that the London sample contains a higher proportion of site managers than the UK as a whole.
- SMSTS (Site Manager Safety Training Scheme) is more frequently mentioned as the type of training received (54%), followed by Site Safety Supervisors Courses (42%) and in-house training (19%).

Overall skill levels

- Almost all construction workers in London (99%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% 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 London construction workers (18%) hold a skill card/certificate, but have no other construction qualification. This compares with a higher UK average of 22%.
- Overall, more than half of London construction workers that provided a response have qualifications equivalent to Level 2 or above (57% cf. 50% in 2015, and 59% across the UK in 2018/19); a quarter hold qualifications equivalent to Level 3 or above (27%).

Geographic mobility

Work history in the region/nation

- That their employer sent them there (62%) is the most likely reasons why construction workers are based within London. This proportion is higher than in 2015 (44%) and this reflects the UK wide picture.
- In 2018/19 compared with 2015 a slightly smaller proportion of construction workers in London have worked within their current region for their entire construction career (43% cf.



46% in 2015) and the majority of construction workers in the region have remained in London for all or most of their career (79%). This is similar to the UK average of 77%.

- Three quarters of construction workers in London (73%) were also based in the region for their last job and this proportion is similar to 2015 (77%).

Worker origins

- Overall, more than three-fifths of all construction workers in London were living in the region when they started their construction career (59% cf. 50% in 2015). There are considerable variations in the extent to which workers have remained in their original locality, with the proportion being highest in Scotland (96%) and Northern Ireland (95%) and lowest in the East of England (44%).
- Three-fifths of construction workers in London (59%) have remained in the same region as they did their first qualification/training in. Compared with other regions/nations, this towards the lower end with the highest proportion by region/nation within Scotland (96%) and the lowest within the South East (41%).

Travel to site

- One in three construction workers in London have travelled at least 50 miles from their permanent/current home to work in the last 12 months (34%). Across the regions/nations, London construction workers are amongst those least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (13% cf. 17% across the UK).
- Overall, 10% of construction workers in London (8% in 2015) are currently staying in temporary accommodation while working at their site. This proportion is double the UK average (5%), and makes London construction workers the most likely to be staying in temporary accommodation.
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 16 miles (18 miles is the UK average) which is less than in 2015 when workers in the region travelled an average (mean) of 19 miles.

Site duration and change

- Two fifths of temporary workers in London (40%) do not know how much longer they can expect to be working for their current company/agency. This compares with a UK average of 38%.
- 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, a sixth expect to stay on that site for a year or longer (16% cf. UK average of 18%), which is a slight decrease compared with 2015 (19%). However, in one in ten cases (11% cf. 22% in 2015) workers do not know how much longer they can expect to be on site, indicating a decrease in the degree of uncertainty in the last 3-4 years.
- Almost nine in ten London construction workers are confident that when they finish their current job their next job will allow them to travel to work from their permanent home on a



daily basis (89% cf. 71% in 2015 and 65% in 2012). This is a higher proportion than the UK average in 2018/19 (84%). The remaining tenth say it depends/they don't know or that they won't be able to commute.

Sub-sector and sector mobility

Sub-sector mobility

- Following on from 2015 the majority of construction workers in London have been working on new housing (67%, 73% in 2015 and 66% in 2012). For all other types of projects the proportion of construction workers that have worked on them has risen since 2015.
- Overall just over a quarter of all construction workers in London have only worked on one project type (28%), which is a much smaller proportion than in 2015 (51%) but in line with other regions/nations (UK average is 30%).

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. Amongst construction workers of all ages in London 42% definitely will be (UK average of 48%); an almost equal number think it is very or quite likely (43%); 4% consider it unlikely; just 1% say they definitely won't be and a further 3% hope to be retired by then, while 7% don't know.



Introduction

Aims and objectives

Following on from previous surveys conducted for CITB in 2015, 2012, 2007 and 2005, BMG Research was commissioned to undertake a UK-wide mobility survey of construction workers in 2018/2019.

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 both occupational and geographic mobility. This work will ultimately provide an evidence-base that has the potential to provide a common currency for subsequent skills planning, particularly in respect of profiling the existing workforce and offering insight into where gaps might emerge as a result of occupational/geographic movement. The final data and findings will be used to ensure that everyone in industry, government, training providers and others know exactly what we will need to continue to develop as an industry.

The specific objectives of this research project were 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 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 workforce / 'imported' workforce.
- Examine the scale and extent of occupational mobility within the construction workforce to see how workers in construction occupations change or keep their occupations over time, both within construction and as they move out of the industry and related to this the extent to which managers and supervisors have received any training specifically to enhance their managerial skills.

The focus of the survey is on site-based manual occupations and, therefore, excluded associated clerical and sales occupations and professionals such as architects, surveyors and office-based managers.

Method

The 2018/19 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2015. Overall, 4048 interviews with construction workers in manual roles across the UK were completed, split between the 12 standard regions/nations. In total, 375 interviews were conducted in London.



Sampling

This sub-section provides an overview of the sampling methodology employed for the 2018 Construction Workforce Mobility 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 the 2015 survey.

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

Project eligibility criteria:

- Value: £250,000+
- Contact 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 region/nation (as well as in 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 and lower numbers of workers than expected 'on-site'. In some regions, more than 30 sites were recruited.

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 in manual trades/roles. A recruitment questionnaire (reproduced in the technical report) was used to check 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.

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 400 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 as reported in the Annual Population Survey via Nomis for economically active adults aged 16+ in October 2017 – September 2018.

Figure 1: Interviews and weights by region/nation

	Interviews	Weighted profile (%)
North East	411	3.9
North West	282	10.5
Yorkshire and The Humber	333	8.1
East Midlands	411	7.4
West Midlands	412	8.1
East of England	298	10.8
London	375	13.6
South East	403	14.4
South West	277	8.6
Scotland	404	8.0
Wales	287	4.3
Northern Ireland	155	2.2
Unknown (paper copies returned by post)	2	N/A
UK	4048	

*Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Jan-Dec14

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 2018/19 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, particularly those on bases further restricted by the routing out of some respondents. Unweighted bases are shown throughout for guidance.

London is referred to by the abbreviation 'GL' in tables.

Profile of construction site workers

This first section of the report provides a profile of construction site workers interviewed in the 2018/19 survey and where possible makes comparisons with 2015. 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;
- 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 and 3 detail the demographic profile (gender, age, ethnicity, nationality and disability) of the 2018/9 sample of construction workers in London, compared with the 2015 survey and official statistics from the Annual Population Survey (where comparisons are possible).

The vast majority of construction workers in manual roles interviewed in London were male (96%). 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 maintenance and repair.

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

	GL 2018/19 %	UK 2018/19 %		UK Workforce* %
Male	96	98	Male	53
Female	4	1	Female	47
Transgender	0	<0.5	Transgender	-
Non-binary	0	<0.5	Non-binary	-
Prefer not to say	0	<0.5	Prefer not to say	-
<i>Unweighted bases</i>	<i>375</i>	<i>4048</i>		<i>32,277,500</i>

Q43 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2017-Sep 2018



Three in five workers (61%) are aged 25-44, slightly above the proportion for the UK construction workforce as a whole (51%), but consistent with 2015 (62%). Across all age groups the proportion of the construction workforce is largely consistent with 2015. The number of construction workers aged under 25 (14%) and over 55 (7%) are below the UK overall (17% and 12% respectively).

Compared with the UK construction workforce overall there is a higher proportion of construction workers aged under 35 years within London (49% in London; 45% across the UK cf. 36% of economically active adults across the UK).

Figure 3: Age profile of the sample compared with 2015, 2012, 2007 & the Annual Population Survey

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %		UK Workforce* %
16 to 19 years	2	3	1	5	5	16 to 19 years	4
20 to 24 years	11	11	14	18	12	20 to 24 years	9
25 to 34 years	35	34	37	29	28	25 to 34 years	23
35 to 44 years	26	28	24	24	23	35 to 49 years	33
45 to 54 years	17	13	15	16	20	50 to 64 years	27
55 to 59 years	5	4	7	8	7		
60+ years	3	4			4	65+ years	4
Prefer not to say	1	-	-	-	<0.5		
<i>Unweighted bases</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4048</i>		<i>32,277,500</i>

Q44 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2017-Sep 2018

In terms of ethnicity, the majority of construction workers in London are of White origins, consistent with previous years (85% cf. 84% in 2015 and 86% in 2012).

Workers of Black (8%) and Asian (4%) ethnic origin (BME) make up similar proportions of the sample as in previous years.



Figure 4: Ethnic profile of the sample compared with 2015, 2012, 2007 and UK Population

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %	UK Population aged 16-64* %
White	85	84	86	90	94	85
Black	8	8	8	4	2	3
Asian	4	3	3	6	2	6
Mixed	2	-	-	-	1	1
Other/Not stated	1	4	4	0	1	4
<i>Unweighted bases</i>	375	452	410	355	4048	41,217,200

Q49 *Source Annual population Survey via Nomis: UK population aged 16-64 Oct 2017-Sep 2018

Figure 5 summarises the proportion of construction workers of non-white (BME) origin overall and within each region/nation and compares the profile with construction workers from previous surveys and the population (aged 16-64) of each region/nation as a whole.

Compared with the London population as a whole (aged 16-64) a lower proportion of London's construction workers are of BME origins (15% cf. 40% amongst the London population and 15% of the UK population).

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

Base: All respondents

	UK BME 2018/19 %	UK BME 2015 %	UK BME 2012 %	UK BME 2007 %	Non-white (BME) population aged 16-64* %
UK	6	4	4	3	15
North East	<0.5	<0.5	<0.5	2	5
North West	3	1	2	3	12
Yorkshire and the Humber	5	2	1	10	12
East Midlands	2	2	2	<0.5	13
West Midlands	7	5	9	1	20
East of England	5	3	4	0	10
London	15	15	12	0	40
South East	10	8	3	3	11
South West	5	2	1	2	6
Wales	2	2	<0.5	1	5
Scotland	1	2	1	7	5
Northern Ireland	1	1	<0.5	4	3
<i>Unweighted bases</i>	4048	4771	4933	3877	41,217,200

Q49 *Source Annual population Survey via Nomis: UK Population aged 16-64 by ethnicity Oct 2017-Sep 2018



In this survey construction workers were asked for detail about their nationality and country of origin.

The majority of construction workers in London originated from outside of the UK (51%), and it is the only region where this is the case. The most likely country of origin, other than the UK, is Romania (15%) and cumulatively almost a third of all London construction workers are from other EU states (31%), including 5% from Ireland, 4% from Poland, and 3% from Bulgaria. From outside of the EU, the most common countries of origin for construction workers are Albania (4%) and India (2%).

Figure 6: Country of origin of construction workers in the UK by region/nation

Base: All respondents * Other EU includes Ireland and Romania but excludes the UK

Row percentages	Unweighted bases	Non-UK %	Ireland %	Romania %	Other EU*
UK	4048	17	1	5	10
East Midlands	411	6	0	2	3
East of England	298	28	1	10	18
London	375	51	5	15	31
North East	411	1	<0.5	0	1
North West	282	3	<0.5	1	2
South East	403	25	1	7	13
South West	277	9	1	1	5
West Midlands	412	12	<0.5	3	6
Yorkshire and the Humber	333	11	<0.5	2	6
Wales	287	3	0	0	1
Scotland	404	3	1	<0.5	3
Northern Ireland	155	5	3	0	4

38% of construction workers in London hold a passport for another country. This compares with a UK average of 14%. The majority hold a UK passport (58%), with a further 3% reporting that they do not have a passport. Of those with a non-UK passport, the vast majority (85%, equating to 33% of all London construction workers) state that it is an EU member state passport.

Of those construction workers in London that were born outside of the UK or have a non-UK passport, 11% have British citizenship, which compares with a UK average of 14%.

Overall, half of London construction workers have lived in the UK all of their life (50%). This proportion is significantly lower than the UK average (80%).

Amongst all London construction workers 1% indicate that they have a long term illness, health problem or disability which limits the type of work they can do. Various types of problems are reported. Across the UK, 3% of construction workers indicate they have a long-term illness, health problem or disability, and the most common condition is a reduced physical capacity (50%).



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 7 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from previous surveys.

In 2018/19 site manager, labourer/general operative, and carpenter/joiner are the top three occupations amongst construction workers in London. This reflects the profile across the UK, although there are fewer bricklayers within London and more site managers. There has been an increase in the proportion that are site managers (from 6% in 2015 to 17% in 2018/19).

Figure 7: Occupational profile

Base: All respondents '-' = not applicable

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
Site manager	17	6	-	-	11
Labourer/General operative	12	17	22	17	16
Carpenter/joiner	10	8	15	14	10
Technical	9	5	6	0	4
Electrician	7	8	11	9	6
Bricklayer	6	5	4	10	11
Plumber	4	5	7	7	4
Plant/machine operative (e.g. fork lift/JCB)	4	5	6	5	7
Supervisor/foreman	4	1	3	1	2
Painter/decorator	3	5	3	1	2
Scaffolder	3	4	1	8	4
Plasterer	2	<0.5	1	4	1
Banksman/banksperson	2	3	4	2	1
Steel erector/rigger	2	2	4	5	1
Ground worker	1	2	-	-	4
Pipe fitter	1	3	4	3	2
Dryliner	1	6	4	With plasterer	3
Roofer	1	5	2	6	2
Mechanical fitter	1	-	-	-	1
Project manager	1	1	-	-	1
Demolition worker	1	-	-	-	<0.5
Concrete worker	1	1	-	-	1
Other	7	-	-	-	3
<i>Unweighted bases</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4048</i>

Q5



Supervisory roles

Just under half of all construction workers in London interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (45%). This is a higher proportion than in 2015 (28%), and compared to the UK average in 2018/19 (30%).

The incidence of workers in a supervisory role is lower amongst workers aged under 25 and amongst those that have worked in the construction industry for less than 5 years, as one would expect. Workers who are directly employed by a company (64%) are more likely than those that are self-employed (34%) or work for an agency (19%) to perform a supervisory or management role. These differences are summarised in the following figure.

Figure 8: Whether respondents perform a supervisory or management role

Base: All respondents * Caution: Small sample base



Unweighted bases in parentheses Q8



Employment status

The highest proportion of construction workers within 2018/19's London sample are self-employed (47%). This is slightly below 2015 and 2012 (51% in each case).

A similar proportion is employed directly by a company (43%). This is a higher proportion than in 2015 (39%) and 2012 (38%). Just under half the respondents who have been working in the construction sector at least 5 years (48%) are directly employed.

The proportion of respondents that are self-employed increases to 70% of scaffolders, 63% of bricklayers, and 62% of electricians.

Figure 9: Employment status

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	UK 2018/19 %	Years working in construction			
					<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	43	39	38	49	41	33	29	48
Self-employed	47	51	51	43	41	46	56	45
Working for an employment agency	10	9	11	7	14	21	15	6
Working on some other basis	1	<0.5	0	<0.5	5	0	0	<0.5
<i>Unweighted bases</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>4048</i>	<i>22</i>	<i>24</i>	<i>79</i>	<i>250</i>

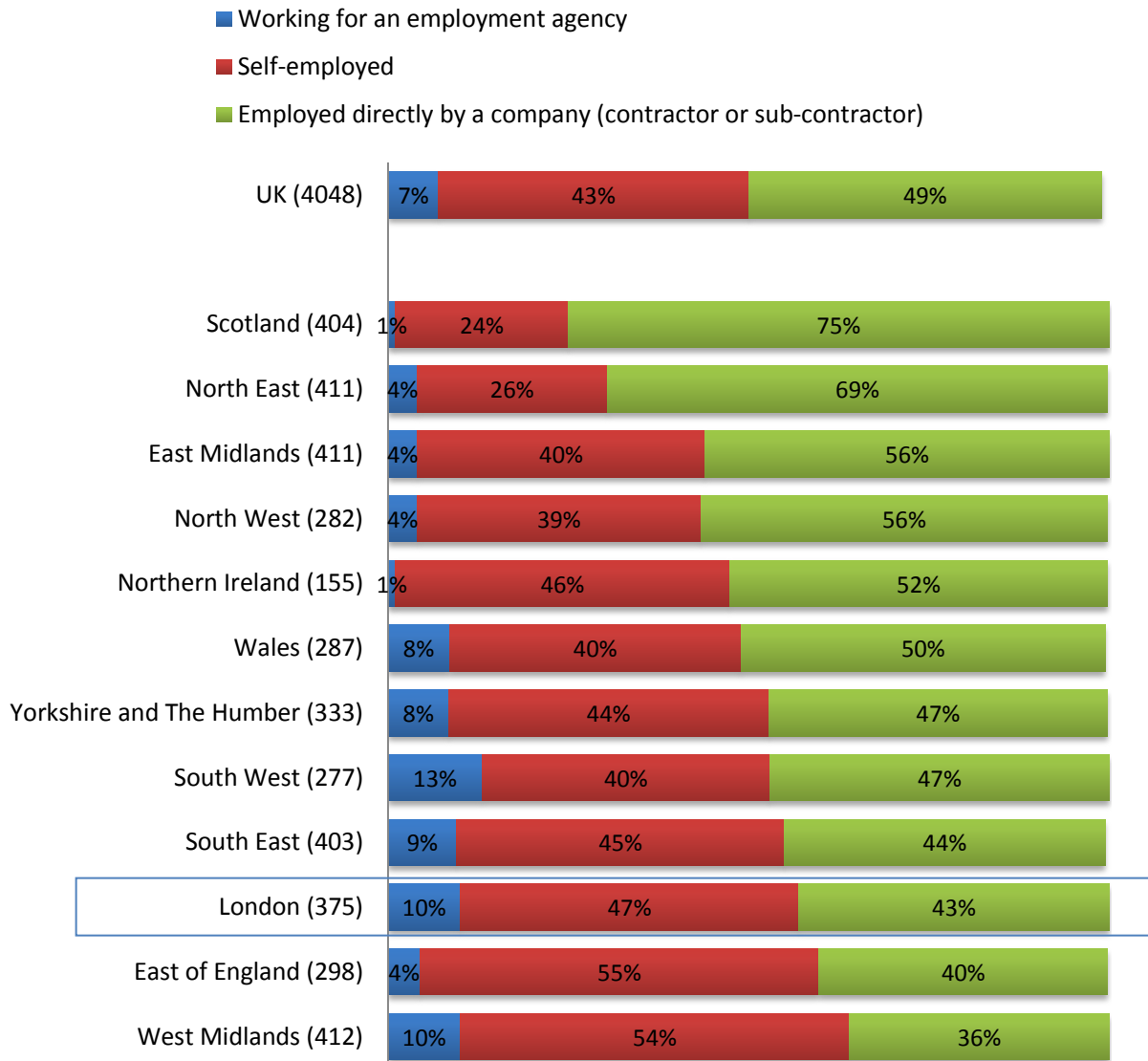
Q20



Compared with UK construction workers, those in London are less likely to be directly employed and more likely to be self-employed and agency workers.

Figure 10: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses Q20



Employment contract basis

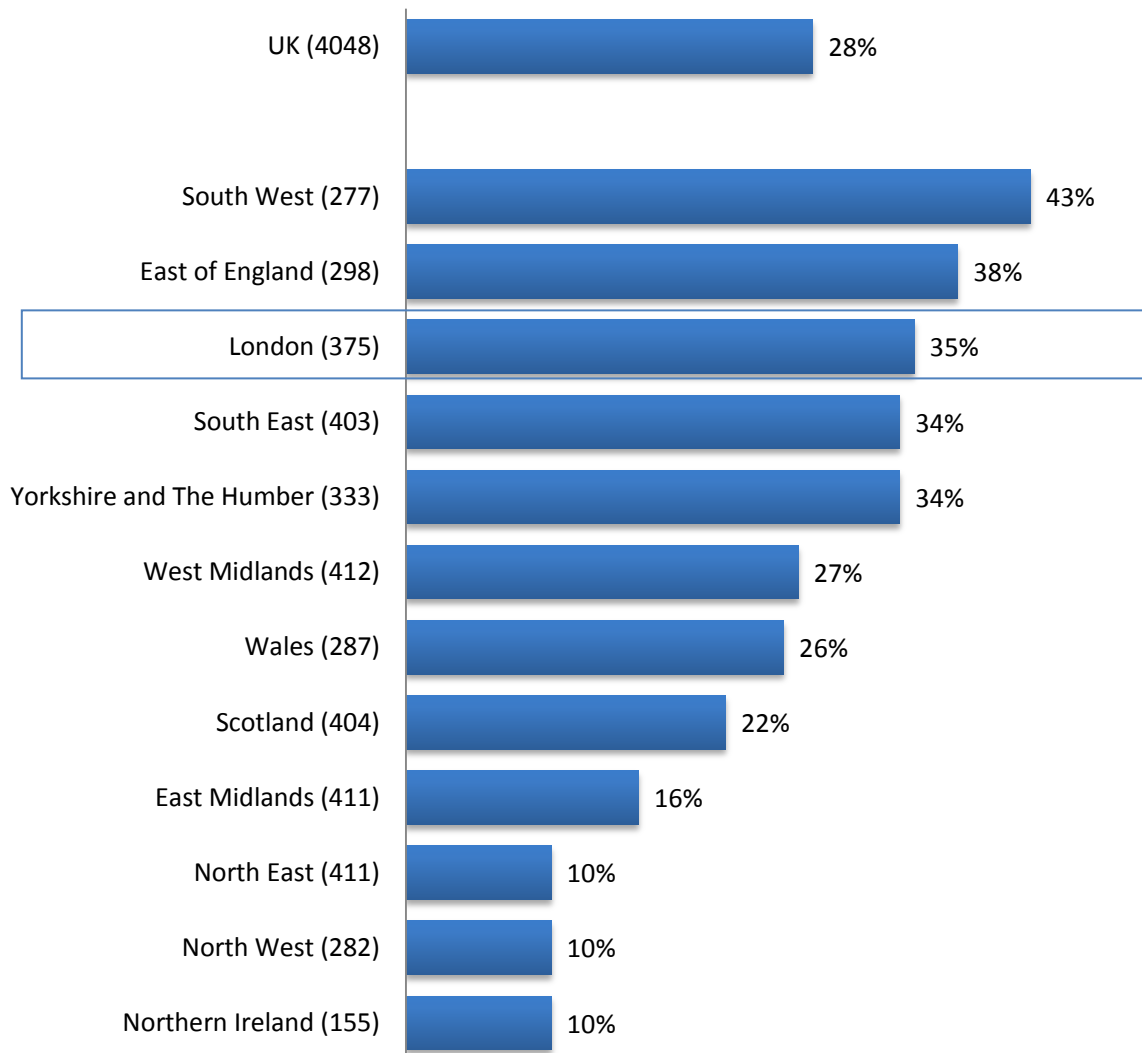
Overall, one in three London construction workers (35%) is employed on a temporary, rather than permanent basis (58%). This is consistent with 2015 when 36% were employed on a temporary basis.

Amongst workers who are employed by an agency the proportion on temporary contracts is significantly higher, as one would expect, than it is amongst those who are self-employed or employed directly (67%, compared with 51% and 9% respectively). However, agency staff are not significantly more likely to have temporary contracts than self-employed workers.

London is higher than the UK average with regard to the profile of its construction workforce in terms of temporary employment contracts held, as the following figure illustrates.

Figure 11: Proportion of workers employed on a temporary basis (including fixed-term contracts)

Base: All respondents



Unweighted bases in parentheses Q21



By current trade/role, the proportion working on a temporary basis is higher than average amongst labourers/general operatives (44%) and electricians (42%) but below average among terms of bricklayers (21%) and site managers (19%).

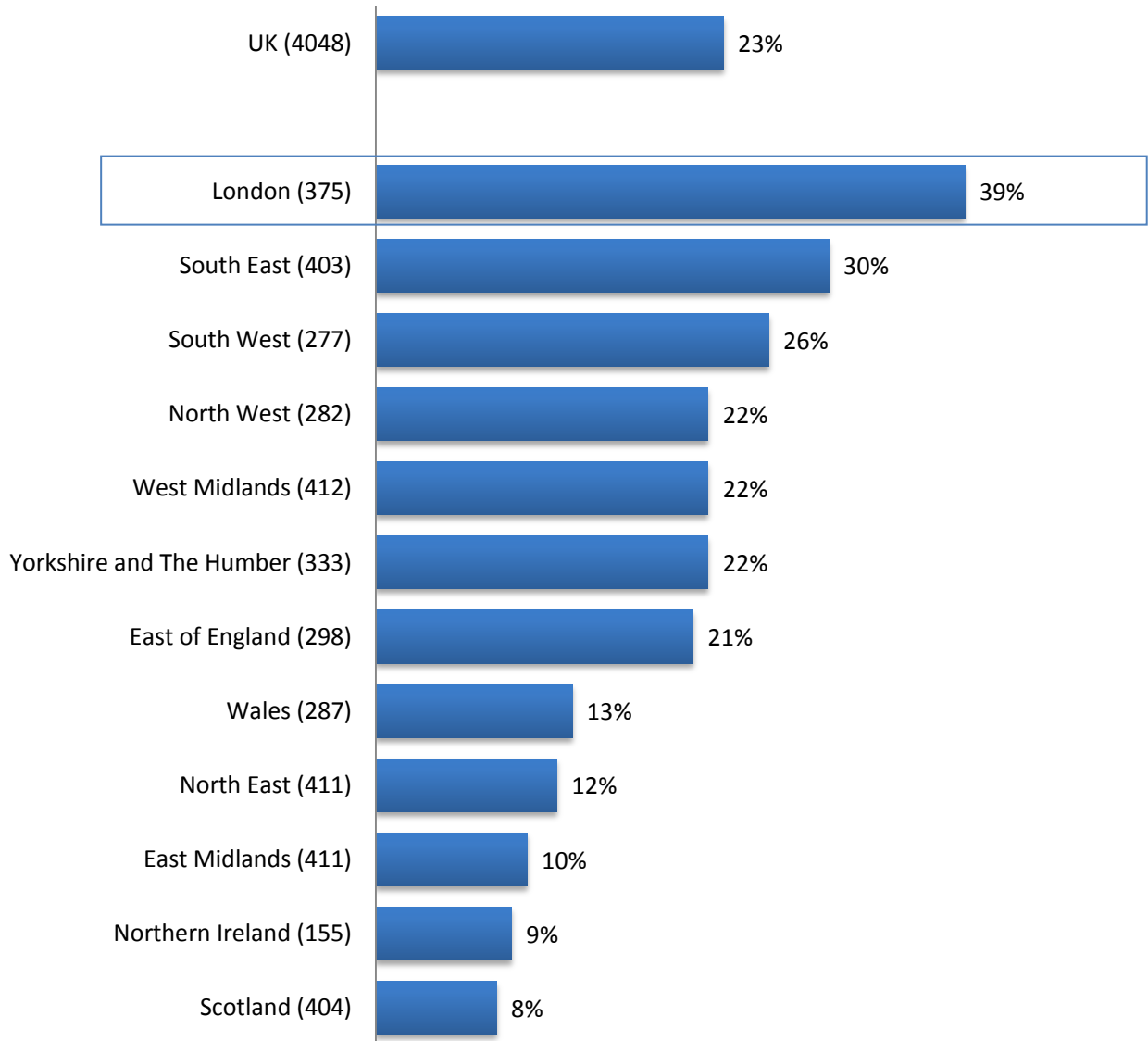
Hours worked

Construction workers in London, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (57%, compared with a UK average of 60%). Two in five (39%) work more than 50 hours a week, which is significantly more than any other region/nation.

Figure 12: Proportion of workers that typically work 50 or more hours per week

Base: All respondents

Unweighted bases in parentheses



Unweighted bases in parentheses Q22



Work histories

Time in the sector

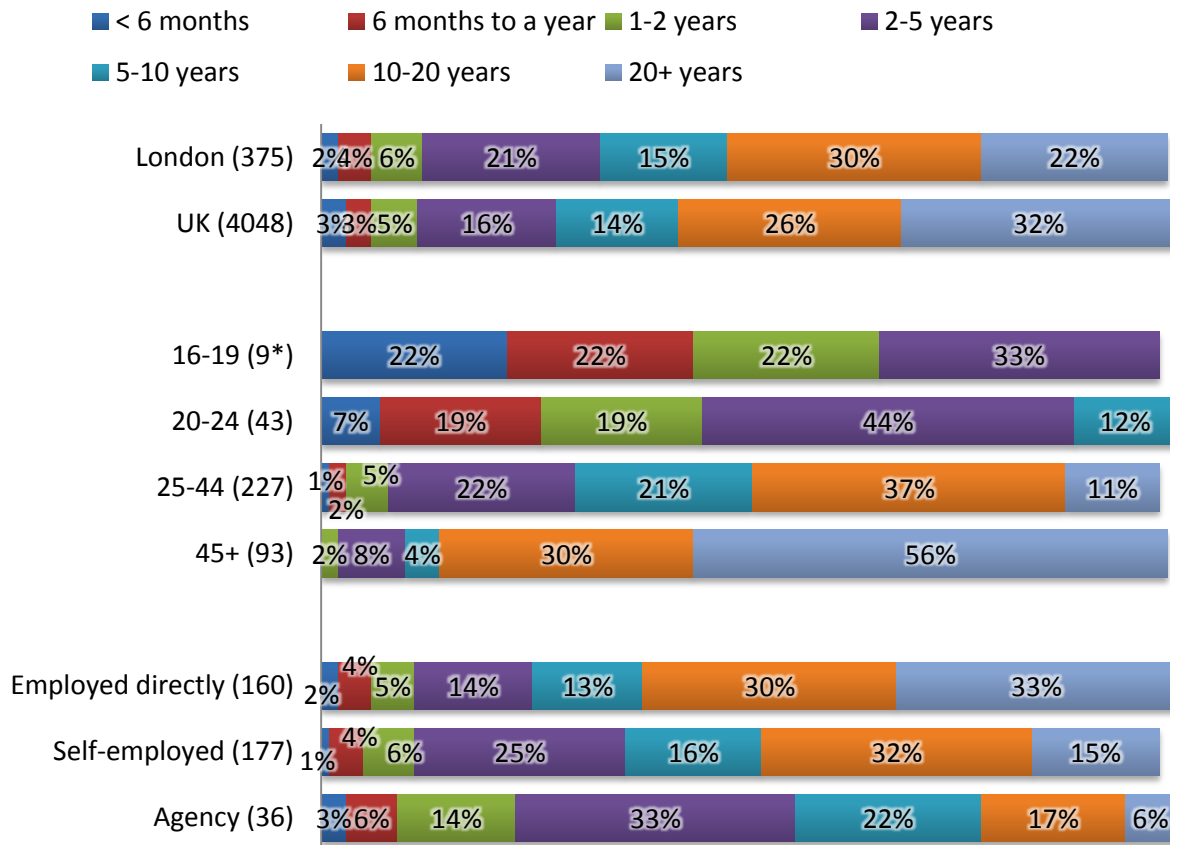
A fifth of London construction workers have worked in the construction industry for over 20 years (22%) and half have worked in the industry for at least 10 years (51%).

Construction workers in London are less likely than the UK average to have worked in the industry for over 20 years (22% cf. 32% across the UK).

As one would expect, the length of experience in the industry increases with age to more than half of workers aged 45 and over in London that have more than 20 years' experience of working in the construction sector (56%).

Figure 13: Years spent working in the construction sector

Base: All respondents Unweighted bases in parentheses * Caution: Small sample base



Unweighted bases in parentheses Q1



Compared with 2015, Figure 14 shows that in 2018/19 workers are more likely to have worked in the construction sector for less than 20 years; 22% have 20+ years' experience, compared with 19% in 2015, whilst 49% have 10 or fewer years' experience. This compares to a smaller proportion across the UK in 2018/19 (42%).

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

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
Less than 6 months	2	7	1	2	3
Up to a year	6	11	3	10	6
Up to 2 years	12	18	10	16	12
Up to 5 years	33	35	29	34	28
Up to 10 years	49	54	57	54	42
Up to 20 years	78	78	78	74	68
More than 20 years	22	19	20	26	32
<i>Unweighted bases</i>	375	452	410	355	4048



Pre-construction employment histories

Two in three of workers in London have only ever worked in the construction industry (63% cf. 67% across the UK and 67% within London in 2015). This includes more than half who have worked in construction pretty much continuously (56%); 5% for whom this is their first job; and a further 2% that have only ever worked in the construction sector, but have had spells out of work.

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

All respondents

	GL 2018/19 %	GL 2015 %	UK 2018/19 %	Age %			
				16 to 19	20 to 24	25 to 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	56	53	56	78	49	56	58
I have only worked in construction jobs but have had spells of being out of work	2	6	4	0	0	2	2
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	6	7	7	0	14	6	4
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	30	21	23	11	28	30	31
This is my first job. I haven't worked in any other industry.	5	8	7	11	7	4	3
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	1	4	3	0	2	1	1
<i>Unweighted bases</i>	<i>375</i>	<i>452</i>	<i>4048</i>	<i>9*</i>	<i>43</i>	<i>227</i>	<i>93</i>

Q2



Overall 1 in 3 construction workers in London say that their first job after full time education was not in construction and that they moved into the industry after working in other sorts of jobs/sectors (30%). This is higher than was reported in 2015 (21%).

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. In more than a third of cases respondents had previously worked in manufacturing (38%) and the proportion of London workers who previously worked in transportation and storage is double that of the UK as a whole (12% cf. 6%).

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

Base: Where first job was not in construction

	GL 2018/19 %	GL 2015 %	UK 2018/19 %
C – Manufacturing	38	14	45
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	14	27	19
H - Transportation and storage	12	7	6
A - Agriculture, Forestry and Fishing	5	4	9
N - Administrative and support service activities	3	11	1
E - Water supply, sewerage, waste management and remediation activities	8	0	3
I - Accommodation and food service activities	3	5	2
J - Information and communication	1	4	<0.5
O - Public administration and defence; compulsory social security	1	6	<0.5
<i>Unweighted bases</i>	<i>112</i>	<i>113</i>	<i>862</i>

Q3



In terms of the job roles that London construction workers have undertaken in other sectors, a third have worked in skilled trades occupations (31%) and a quarter have worked as managers, directors and senior officials (25%). The proportion of London construction workers who have worked in professional and associate professional and technical occupations is significantly below the overall UK figure (13% cf. 28%).

Figure 17: Job roles undertaken in other sectors

Base: Where first job was not in construction



Unweighted base = 112 Q3



Occupational switching and progression within construction

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

Overall just under half of all construction workers in London have worked in more than one construction trade or occupation whilst working in the construction industry (44%), which is a higher proportion than in 2015 and compared with the UK average in 2018/19 (both 36%).

As one would expect the proportion of workers that have had more than one role increases with age (to 51% amongst those aged 45+ cf. 29%* of those 16 to 24 years).

Workers with the highest level of qualifications (Level 4 and above) are more likely to have had more than one role or occupation within the construction sector (57%), as are those in a supervisory or management role on site (51%).

There are also variations by current job role, with site managers (63%), and carpenters/joiners (57%) most likely to have had more than one role/occupation within construction. Bricklayers (21%) are least likely to have had any other trade within the construction sector. 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 18: Other construction roles under taken, by current occupation

Base: All respondents

MORE likely to have had more than one role			LESS likely to have had more than one role		
	GL 2018/19 %	UK 2018/19 %		GL 2018/19 %	UK 2018/19 %
Site manager (62)	63	69	Labourer /Gen. Op. (45)	36	29
Carpenter/Joiner (37)	57	22	Bricklayer (24)	21	24
			Technical (35)	29	29
			Electrician (26)	27	17

Unweighted bases for 2018/19 London in parentheses

Q6



Respondents 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 have previously worked in, with each respondent able to list all previous occupations. Figure 19 summarises the previous trades/occupations listed by more than 1% of those who have worked in other roles in the construction sector.

Workers are most likely to have previously worked as a labourer/general operative (37%) while 1 in 5 workers has previously worked as a carpenter/joiner (20%).

Figure 19: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	GL 2018/19	UK 2018/19
	%	%
Labourer/General operative	37	34
Carpenter/joiner	20	19
Dryliner	13	8
Painter/decorator	12	7
Banksman/Banksperson	9	6
Plant/machine operative (e.g. Fork lift/JCB)	8	10
Ceiling fixer	8	5
Bricklayer	7	12
Site manager	6	5
Steel erector/rigger	6	4
Plumber	6	5
Floorer	5	4
Electrician	5	5
Ground worker	4	5
Roofer	4	8
Pipe fitter	4	4
Scaffolder	4	4
Welder	4	2
Plasterer	4	8
Technical	2	3
Mechanical fitter	1	1
Glazer/window fitter	1	1
Supervisor/foreman	1	1
Concrete worker	1	<0.5
Other	12	7
<i>Unweighted base</i>	<i>163</i>	<i>1328</i>

Q7



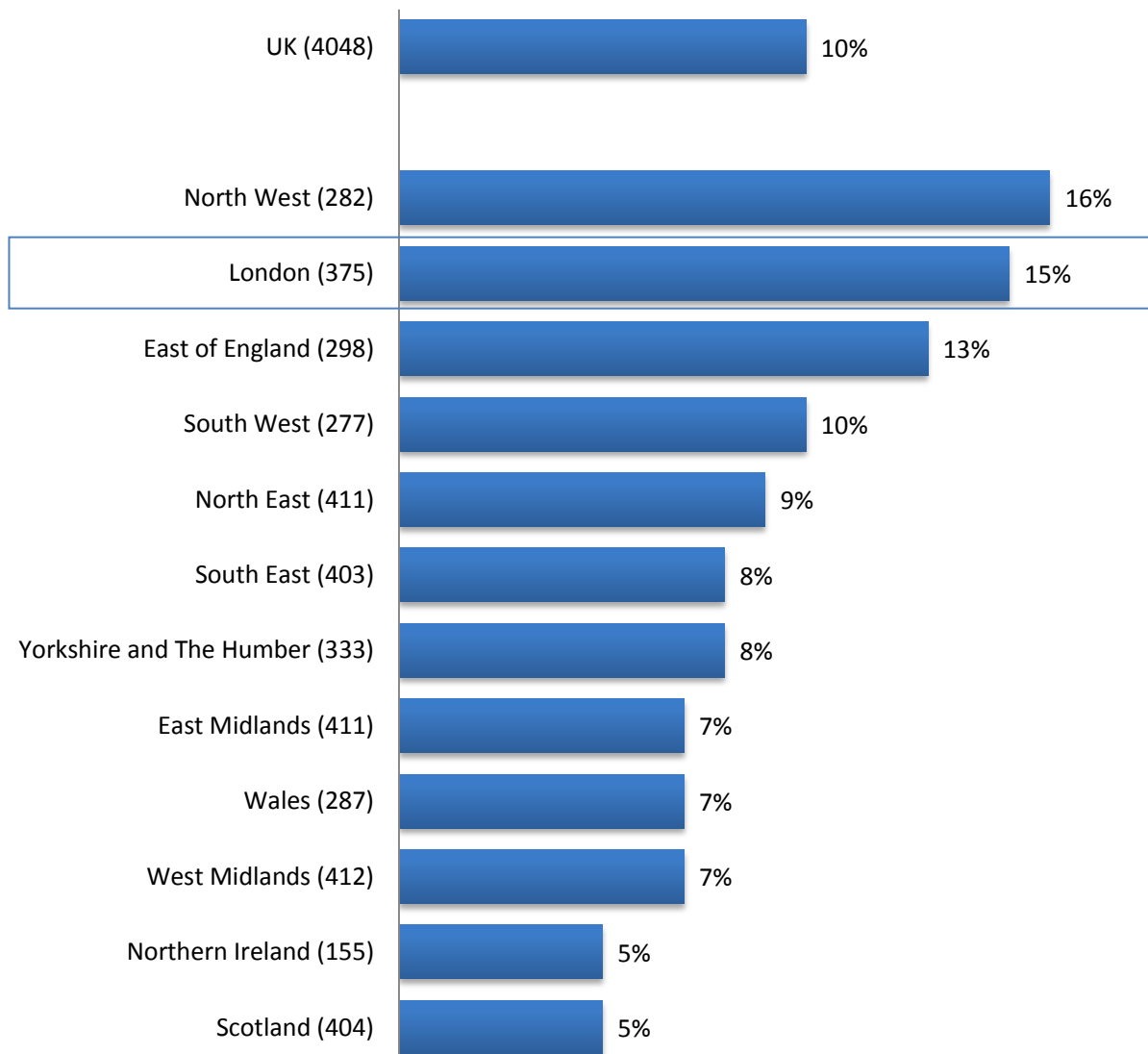
Future career plans

Thinking about their future plans in construction, 7 in 10 construction workers in London would like to carry on in the same trade or occupation (73%); 15% would like to change their trade/occupation; and less than 1 in 20 would like to leave construction (3%); the remainder (9%) are not sure.

Compared with the UK average, London construction workers are significantly less likely to want to carry on as they are (80% across the UK) and significantly more likely to want to change their trade/occupation (10% across the UK).

Figure 20: Proportion of construction workers that would like to change their trade or occupation, by region/nation

Base: All respondents



Unweighted bases in parentheses Q33



By current trade/occupation those working as electricians (96%) are most likely to want to carry on as they are.

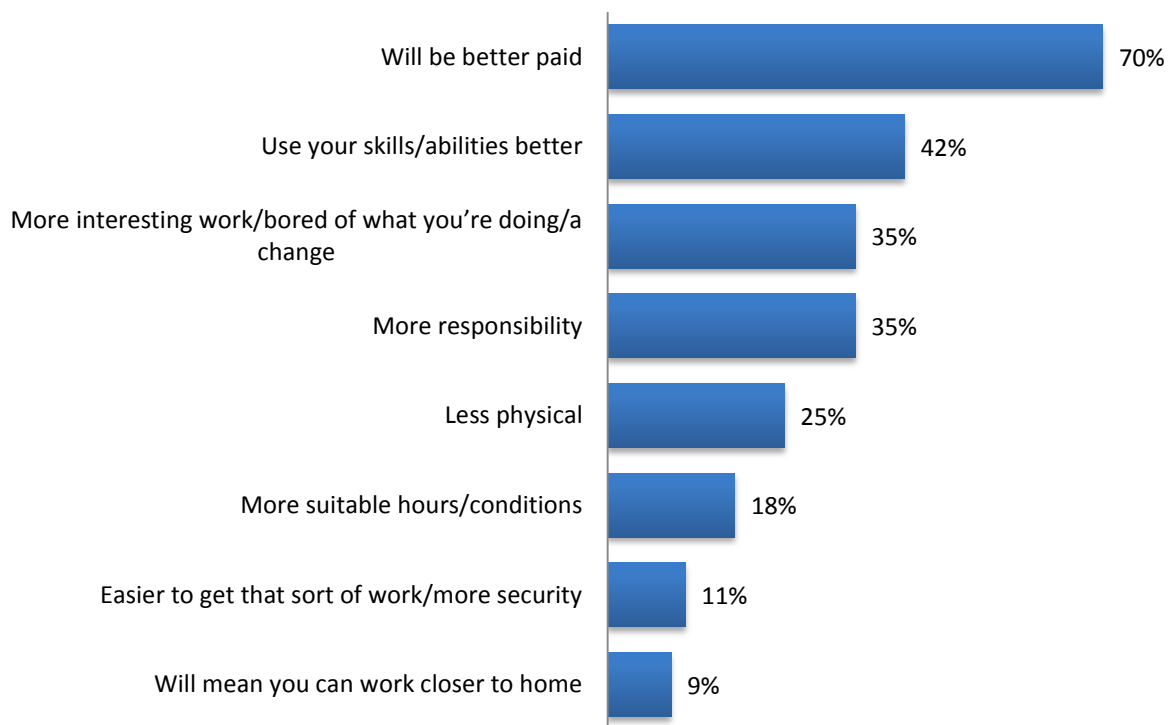
Amongst those who would like to change trade or occupation a wide range of alternative trades/occupations are mentioned; however, the highest proportions overall would like to be a site manager (21%), or working in a technical role (e.g. surveyor, maintenance technician) (18%).

In 8 in 10 cases where construction workers in London would like to change trade or occupation, they believe they will require further training or qualifications in order to do this (81%). This compares to a higher proportion in 2015 (88%) and across the UK in 2018/19 (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (70%), while two-fifths believe they would use their skills/abilities better (42%), slightly fewer (35%) wants more responsibility with the same proportion wanting more interesting work. A quarter (25%) want less physical work.

Figure 21: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 57 Q36



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 qualifications being worked towards;
- Workers self-perceived need for additional training in basic skills.

Construction skill cards and certificates

When asked which type of construction skill certificate or card they currently hold (e.g. CSCS or CSR) just 2% of all construction workers in London (2% across the UK) say they do not hold any card. In total therefore 98% of all workers are certain that they hold at least one type of skill card or certificate that provides evidence to construction sites that they have received a certain level of health and safety awareness training.

Figure 22 summarises the proportion of workers by region/nation that hold any card and compares these proportions with previous surveys and the UK as a whole.

Figure 22: Proportion of workers that have a skill card/certificate, by region/nation

Base: All respondents

	2018/19	2015	2012
	%	%	%
UK (4048)	97	96	97
West Midlands (412)	99	98	100
Scotland (404)	99	88	98
Yorkshire and the Humber (333)	98	97	97
London (375)	98	98	96
South East (403)	98	98	96
North West (282)	98	97	99
East of England (298)	97	96	98
South West (277)	97	96	97
Northern Ireland (155)	97	90	100
North East (411)	94	96	99
East Midlands (411)	93	93	99
Wales (287)	92	92	92
<i>Unweighted bases for 2018/19 in parentheses</i>			



As in previous surveys, the incidence of workers holding skill cards or certificates remains lower amongst those who have worked within construction for a shorter period of time (91% amongst those that have worked in the industry for less than a year). This suggests that employers are not always ensuring that new employees are immediately made aware of the need to prepare for, or acquire a CSCS card (or similar) and/or that young trainees are starting work/placements without the assurance that comes from having achieved such an accreditation.

Figure 23: Proportion of workers that have a skill card/certificate, by other variables

*Base: All respondents * Caution: Small sample base*

		GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
Total (375)		98	98	96	72	97
Age	16 to 19 years (9*)	78	100	0	63	85
	20 to 24 years (43)	100	96	88	64	97
	25 to 44 years (227)	98	98	97	72	98
	45+ years (93)	99	96	99	79	98
Length of time in construction	<1 year in construction (22)	91	92	0	40	89
	1 to 2 years (24)	100	100	68	55	97
	2 to 5 years (79)	96	99	91	66	96
	5+ years (250)	99	98	99	78	98
Contract-type	Employed directly (160)	98	97	99	72	96
	Self- employed (177)	99	99	99	71	98
	Agency (36)	97	93	68	78	97

Unweighted bases for 2018/19 London in parentheses

Q12



In terms of the type of skill card or certificate held by construction workers in London the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (87%), as it was in 2015 (89%).

Figure 24: Type of skill card/certificate held

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	UK 2018/19 %
CSCS (Construction Skills Certification Scheme) (GB)	87	89	91	85
CSR (Construction Skills Register) (NI)	3	1		3
CISRS (Construction Industry Scaffolders Record Scheme)	3	4	2	3
CPCS (Construction Plant Competence Scheme)	8	7	11	11
Other	6	6	8	4
<i>Unweighted bases</i>	375	452	410	4048

Q12

Analysis by current job role highlights where the incidence of certain types of skill card/certificate is higher than average:

- All carpenters/joiners (100%) hold the CSCS, as do the vast majority of labourers/general operatives (96%) and bricklayers (92%).
- One in three electricians hold a different card/certificate (27%).
- Just under one in ten bricklayers (8%) hold a CSR card.
- One in ten (9%) of technical workers do not hold any card/certificate.



Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 25 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Overall, within London, 4% of CSCS card holders have red trainee cards and 1% have red experienced worker cards; nearly two fifths of CSCS (38%) card holders have green cards and a quarter hold blue cards (25%). One in twenty CSCS card holders have gold cards for advanced craft/skilled workers (7%) and 5% have the gold card for supervisors.

Figure 25: Colour of CSCS/CSR cards held

*Base: Where CSCS or CSR cards are held *caution: small sample base*

	CSCS %		CSR* %
Red - Trainee	4	Red - Apprenticeship/Trainee	0
Red - Experienced worker card	1	Red - Trained Plant Operator	0
Green - construction site operative card for general site workers	38	Green - Construction Operative (for general site workers)	9
Blue - skilled	25	Blue - Operative/ Craft	9
Gold - supervisor card	5	Gold - Craft/Supervisor Card	55
Gold - Advanced craft/skilled worker	7	Gold - Advanced Scaffolder	0
Black - contracts manager card	8	Black - Senior Managers Card	9
Academically Qualified Persons Card	4		
Professionally Qualified Persons Card	1		
Construction Site Visitor Card	1		
Apprentice Card	1		
Other	5	Other	18
Unsure	1	Unsure	0
<i>Unweighted bases</i>	325		11

Q13/Q14



As expected, younger workers are more likely to hold Red Trainee cards (16% of 16 to 24 year olds with a CSCS card). Workers currently employed by an agency are more likely to hold Green cards (75%), compared with those employed directly or self-employed (27% and 39% respectively).

Card colours also vary significantly according to current occupation/trade, as Figure 26 summarises. Some significant differences include that labourers/general operatives are most likely to hold Green cards (79%); and carpenters/joiners (62%) are most likely to hold Blue cards.

Figure 26: Colour of CSCS card held, by current occupation

*Base: Where currently hold a CSCS card *caution: small sample base*

	<i>Unweighted bases</i>	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold %	Black %
Labourer / Gen. Op.	43	5	0	79	9	0	0
Carpenter / Joiner	37	0	3	30	62	5	0
Bricklayer	22	0	0	27	41	23	5
Site manager	56	5	0	20	7	16	36
Electrician	19*	5	0	21	5	53	0
Technical	29	3	3	24	7	3	10



Construction qualifications held

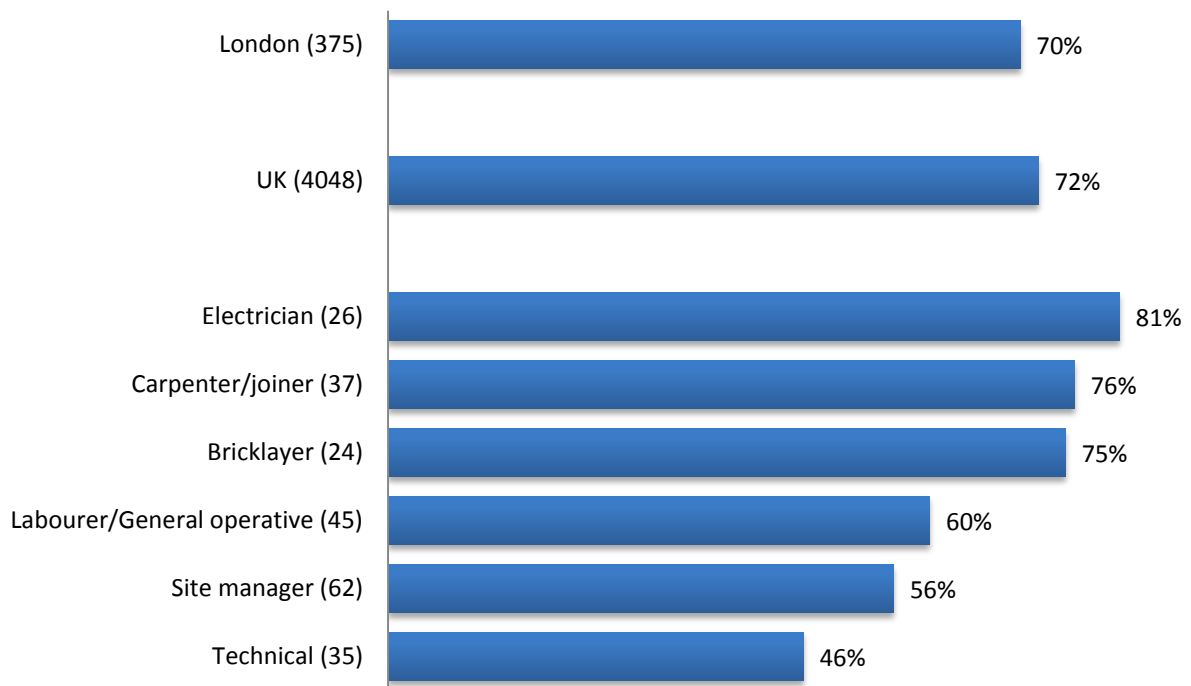
All workers were asked about the construction-specific qualifications they held after leaving full time education and started their first proper job in construction.

Overall, 70% of construction workers in London say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 83% in 2015 and 72% of all UK construction workers in 2018/19.

By current trade/occupation within London the proportion of workers that started their construction careers with no formal qualifications is highest amongst electricians (81%) and lowest amongst technical workers (46%).

Figure 27: Proportion of workers that had no formal construction-specific qualifications when they started their first proper job in construction, since leaving full time education, by occupation

Base: All respondents *caution: small sample base



Unweighted bases in parentheses Q15/Q16



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 we are able to derive the highest level of construction qualification held at the time of interview, including the type of qualification, the subject of the qualification and the level.

Overall, three quarters of London construction workers reported holding some sort of construction related qualification at the time of interview (74%), compared with a much smaller proportion in 2015 (52%).

As Figure 28 summarises, the proportion of workers that hold any qualifications is lower than average amongst those who have worked in construction for less than a year (41%).

Figure 28: Proportion of workers that hold any construction-specific qualification

Base: All respondents

*caution: small sample base

		GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
Total (375)		74	52	60	36	72
Age	16 to 19 years (9*)	11	58	0	21	52
	20 to 24 years (43)	58	56	44	21	63
	25 to 44 years (227)	76	52	63	38	74
	45+ years (93)	83	56	62	46	76
Length of time in construction	<1 year (22)	41	33	0	6	34
	1 to 2 years (24)	58	45	28	15	52
	2 to 5 years (79)	54	28	53	13	63
	5+ years (250)	84	64	67	47	79
Current contract type	Employed directly (160)	80	59	67	39	75
	Self- employed (177)	74	50	63	35	73
	Agency (36)	47	37	23	28	49
<i>Unweighted bases for 2018/19 London in parentheses</i>						

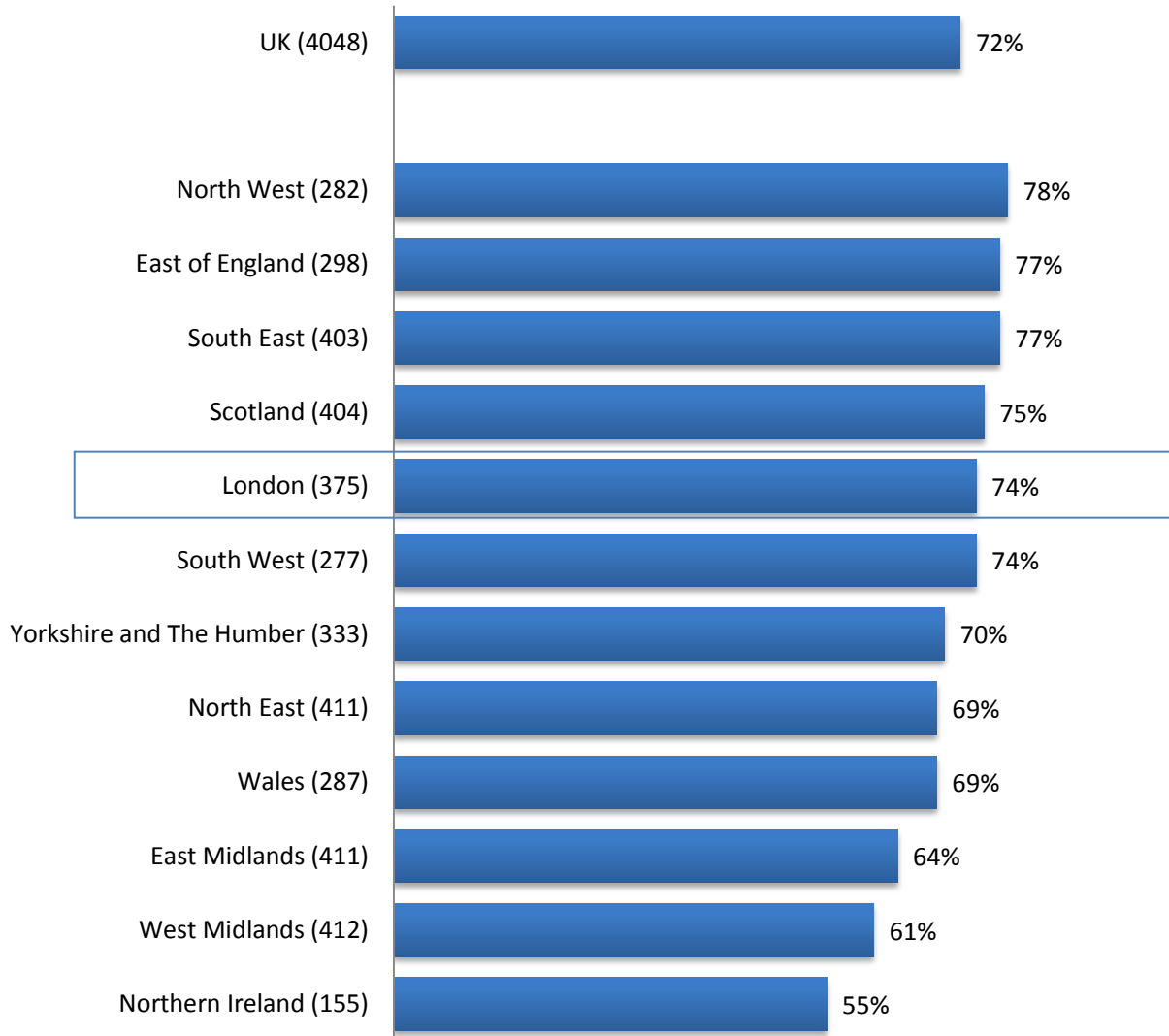
Q15/Q16



London is in line with the UK average in terms of the propensity of its construction workforce to hold any construction-specific qualifications (see Figure 29).

Figure 29: Proportion of workers that hold any construction-specific qualification, by region/nation

Base: All respondents



Unweighted bases in parentheses Q15/Q16

The likelihood that workers hold any qualifications also varies significantly by current job role. Site managers (90%) and electricians (81%) are more likely than average to hold qualifications. Only three in five labourers/general operatives (58%) hold any.



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 30 summarises the types of qualifications that workers hold and compares the figures to the 2015 survey (amongst those who have any qualifications and who provided a response).

The qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (51%), which is lower than the proportion reported in 2015 in London (68% in 2015) and the UK 2018/19 average (58%). One in eight London construction workers with qualifications hold a degree (13%), a higher proportion than in 2015 (10%) and higher than the UK 2018/19 average (7%). In London, just 5% of construction workers with qualifications hold an apprenticeship. This is similar to 2015 within London (6%) and the UK average in 2018/19 (6%).

Figure 30: Main type of qualification held

Base: Workers with qualifications (valid responses)

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
NVQ/SVQ	51	68	72	57	58
City & Guilds	8	18	10	30	14
Apprenticeship	5	6	0	6	6
HNC/HND/BTEC Higher	4	3	2	1	6
Degree	13	10	4	0	7
Other	38	12	4	n/a	24
<i>Unweighted bases</i>	244	182	163	119	2122

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 basic skills to help with their work.

Overall, 1 in 5 construction workers in London believe they would benefit from some form of training in basic skills (19% cf. 26% in 2015 and 2012). This is a higher proportion to the UK 2018/19 average (11%).

In terms of the type of training required the most common is speaking English (14%) with an almost even split across reading, writing, and maths, as Figure 31 summarises.

Figure 31: Self-assessed need for training in basic skills

Base: All respondents

	GL 2018/19	GL 2015	GL 2012	GL 2007	UK 2018/19
	%	%	%	%	%
ANY	19	26	26	24	11
Reading	7	9	11	14	5
Writing	7	9	11	12	5
Speaking English	14	16	14	15	6
Maths	5	6	10	8	5
<i>Unweighted bases</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4048</i>

Q37

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

- Younger workers aged 16-24 refer to speaking English (23%);
- One in seven of those aged 20-24 feel they need training in reading (14%);
- Newer construction workers and those employed by an agency make reference to speaking English;
- A quarter of those working in construction for under 5 years (26%) and a similar proportion of those employed by an agency (25%) feel they would benefit from training in speaking English;
- 42% of labourer/general operatives believe they would benefit from some training in speaking English.



Current study for additional construction qualifications

Overall, 19% of all construction workers in London are currently working towards a formal qualification relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 14% in 2015, 12% in 2012 and a UK average in 2018/19 of 15%.

As in previous surveys the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (35% of 16 to 24 year olds) and higher amongst those who have worked within the construction industry for less than a year (45%). Workers employed directly (24%) or through an agency (22%) are also more likely than those who are self-employed (14%) to be currently working towards a qualification. Of those who have no qualifications, currently 29% are working towards one. Figure 32 summarises these findings.

Figure 32: Proportion working towards additional construction qualifications

*Base: All respondents *caution: small sample base*

		GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
Total (375)		19	14	12	15	15
Age	16 to 19 years (9*)	67	31	0	42	55
	20 to 24 years (43)	28	27	22	17	24
	25 to 44 years (227)	18	14	9	13	14
	45+ years (93)	14	7			6
Length of time in construction	<1 year (22)	45	17	0	40	38
	1 to 2 years (24)	25	21	18	9	31
	2 to 5 years (79)	24	22	15	17	25
	5+ years (250)	15	11	10	12	9
Contract type	Employed directly (160)	24	15	N/A	N/A	20
	Self- employed (177)	14	13	N/A	N/A	9
	Agency (36)	22	21	N/A	N/A	11
Highest qualification level	None (98)	29	11	N/A	N/A	16
	Level 1 (11)	9	11	N/A	N/A	27
	Level 2 (78)	6	19	N/A	N/A	12
	Level 3 (46)	24	14	N/A	N/A	14
	Level 4+ (23)	22	22	N/A	N/A	21

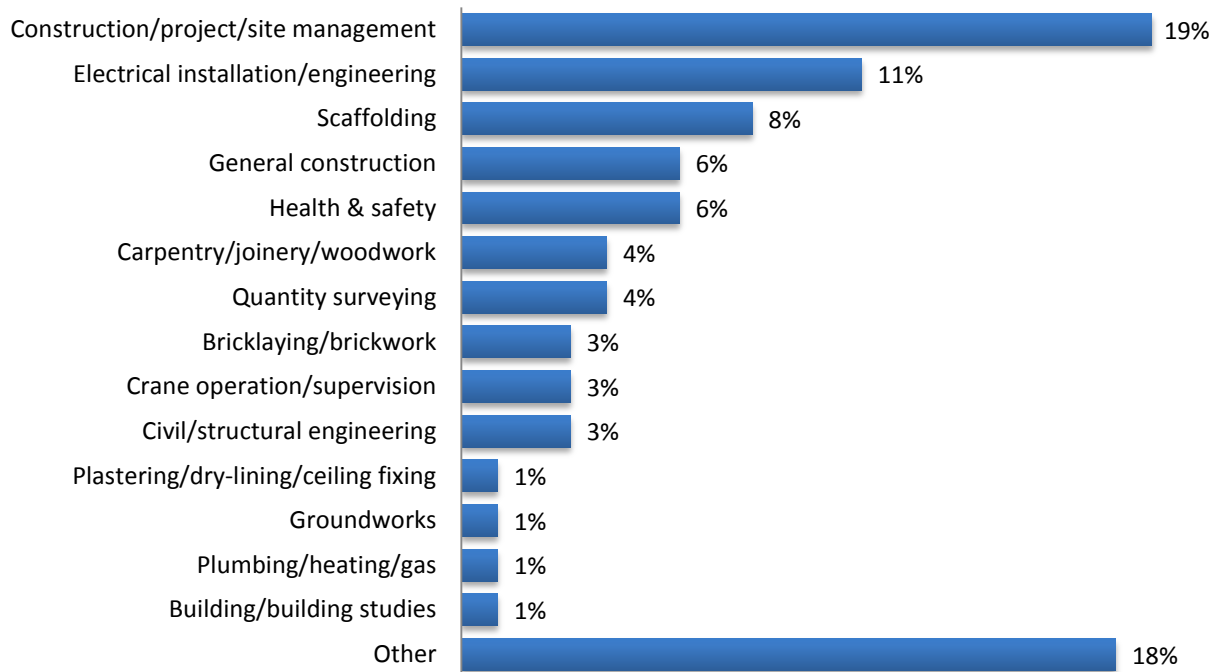
Unweighted bases for 2018/19 London in parentheses

Q18



Of those who are currently studying for a qualification the most popular type of qualification is an NVQ/SVQ (43%). In terms of the subject of the qualifications being worked towards construction/project/site management (19%), and electrical installation/engineering (11%) are most popular, as Figure 33 illustrates.

Figure 33: Subject of qualification being worked towards
Base: Where working towards a qualification



Unweighted base = 72 Q19



Supervisory and managerial qualifications and training

As reported earlier, 45% of construction workers in London perform a supervisory or management role at their site. Amongst those who do not currently perform supervisory/management roles 2 in 5 want to become a supervisor or manager in the future, but have not done it before (41%) and a further 9% want to be a supervisor/manager and have done it before. Around a sixth of all workers who are not currently managers/supervisors are unsure as to whether they'd like to be one in the future (16%), while more than a third are certain that they do not want to be (35%).

The likelihood that workers want to be supervisors/managers also diminishes amongst older workers, with 45% of those aged 45+ not wishing to be supervisors/managers.

Figure 34: Whether those who are not currently supervisors want to be one in the future

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

*caution: small sample base

		Unweighted bases	Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
London		199	41	9	35	16
UK		2824	24	6	51	20
Age	16 to 19 years	7*	43	0	29	29
	20 to 24 years	31	39	3	39	19
	25 to 44 years	119	45	9	30	15
	45+ years	42	29	12	45	14
Length of time inc construction	<1 year	21	52	0	38	10
	1 to 2 years	16	44	0	50	6
	3 to 4 years	56	46	4	29	21
	5+ years	106	35	14	35	16
Contract type	Employed directly	55	38	7	38	16
	Self-employed	115	44	10	34	12
	Agency	28	29	7	32	32
Highest qualification level	No Qualifications	80	35	5	39	21
	Level 1	10*	40	0	50	10
	Level 2	44	36	14	30	20
	Level 3	15*	60	13	27	0
	Level 4+	0	0	0	0	0



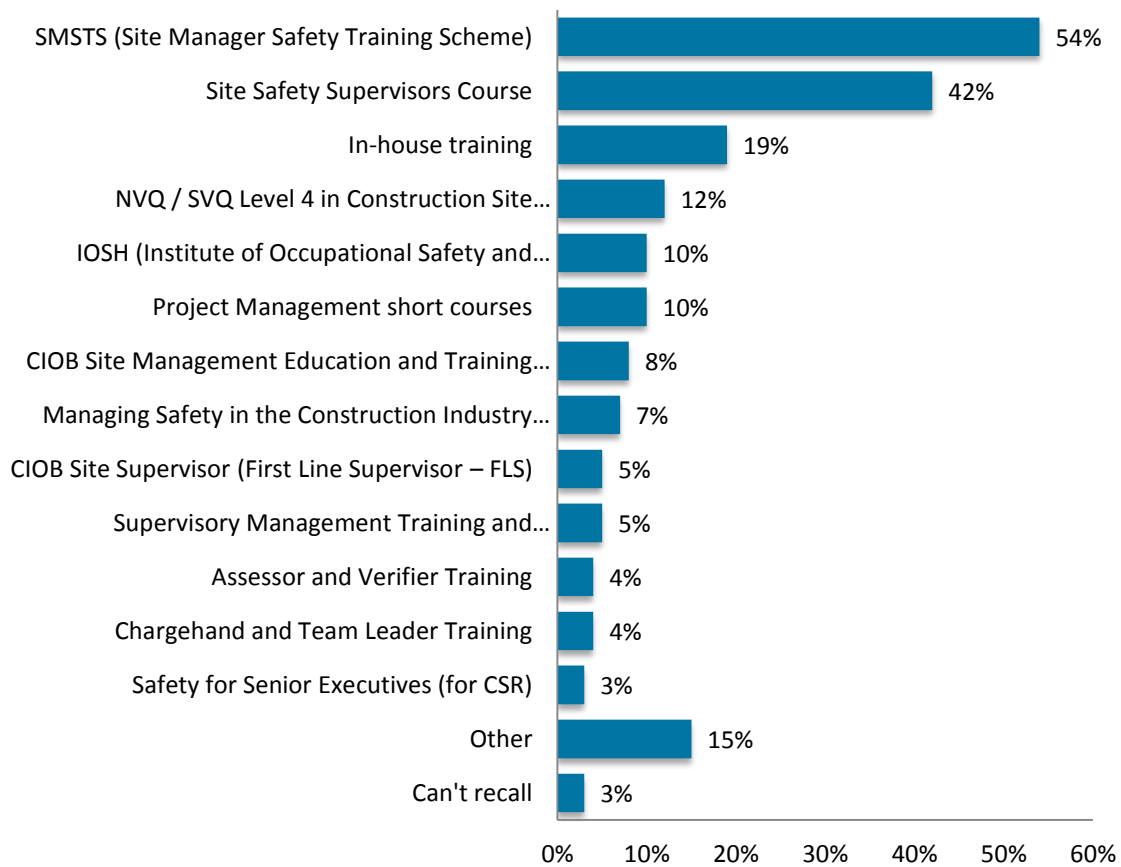
Just under half of construction workers in London (46%; 34% across the UK) and the majority of those who have had some form of supervisory or management responsibilities (85% and 81% across the UK in 2018/19) have received any formal training designed to improve managerial or supervisory knowledge or skills.

The proportion that have undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years (56%, compared with 26% of those with less experience). Construction workers employed directly are significantly more likely than those who are self-employed or agency workers to have received formal training in this area (59%, cf. 38% and 22%). Nearly all site managers in the sample (95%) have received formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken the proportions mentioning each type are summarised in Figure 35. SMSTS is most frequently mentioned (54%), followed by Site Safety Supervisors Course (42%) and in-house training (19%).

Figure 35: Types of managerial/supervisory training undertaken

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



Unweighted base = 171 Q11



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 36 below.

As in previous surveys the vast majority of construction workers in London (99%) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

Just under a fifth of the workforce (18%) hold a skill card/certificate, but have no other construction qualification, this is considerably less than in 2015 (40%) and 2012 (56%).

Figure 36: Qualification status summary

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	99	98	96	80	99
Holds a formal construction qualification or a skills card/certificate	99	98	96	76	98
Holds a skills card/certificate	98	97	96	72	97
Holds a skills card/certification but no other qualification	18	40	56	43	22
Working towards a qualification	19	14	12	15	15
<i>Unweighted bases</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4048</i>



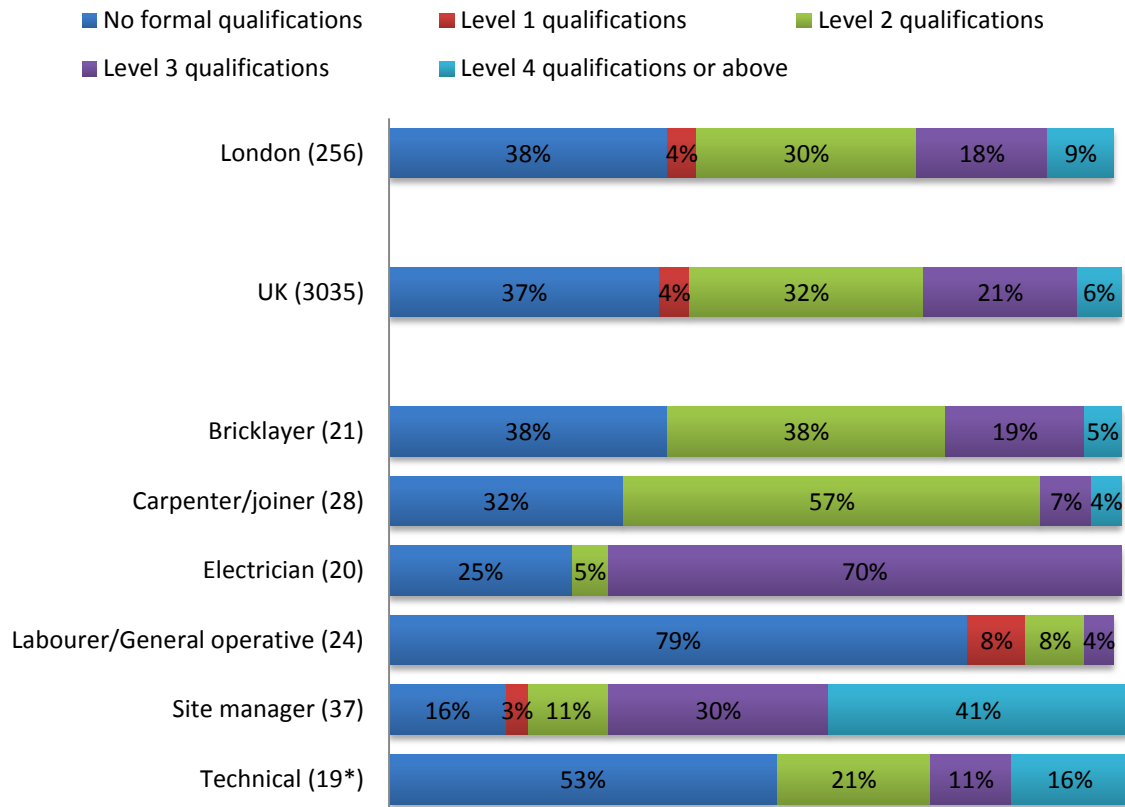
Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. Figure 37 summarises construction workers' highest level of qualification, overall and by occupation, based on where the information provided enabled a level to be assigned (32% of all London construction workers did not provide sufficient information).

Overall, more than half of construction workers in London providing a response have qualifications equivalent to Level 2 or above (57%, cf. 50% in 2015; 59% across the UK in 2018/19). A quarter (27%) hold qualifications level 3 or above.

By occupation site managers (providing a response) are most likely to hold the highest level of qualifications; with two in five holding qualifications at Level 4 or above (41%). Electricians (70%) are more likely than other occupations to hold qualifications equivalent to Level 3 (with none holding Level 4+ qualifications in each case).

Figure 37: Current qualification level, by occupation

Base: All respondents who provided a valid response * caution: small sample base



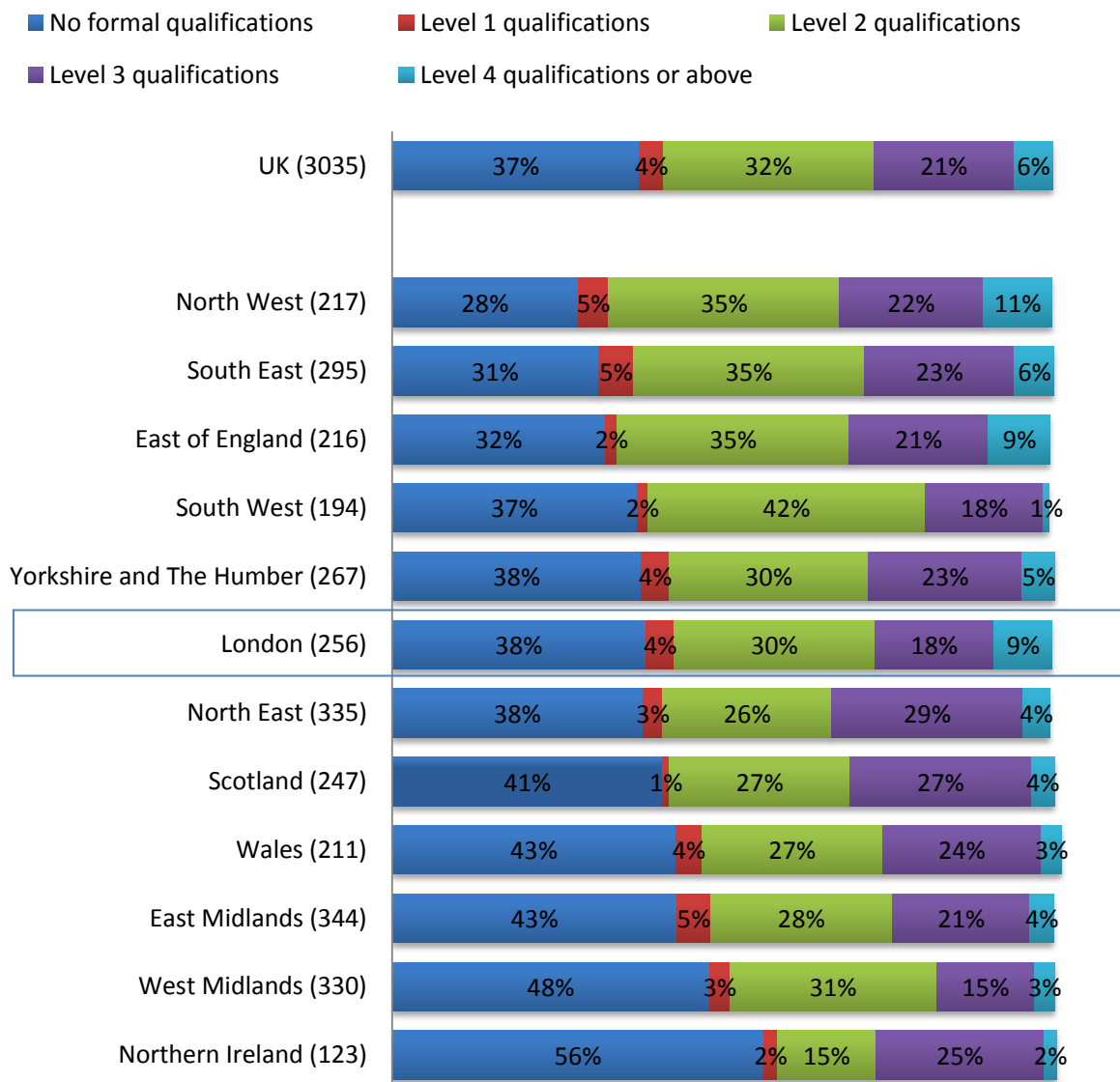
Unweighted bases in parentheses Q15/Q16



Analysis by region/nation reveals that while the proportions that hold qualifications at Level 1, or at Level 4 and above, are generally quite similar, the proportions that have Level 2 or 3 qualifications and no qualifications vary quite considerably. These variances are summarised in Figure 38, which highlights that the construction workforce in London is about average for the UK.

Figure 38: Current qualification level, by region/nation

Base: All respondents who provided a valid response



Unweighted bases in parentheses

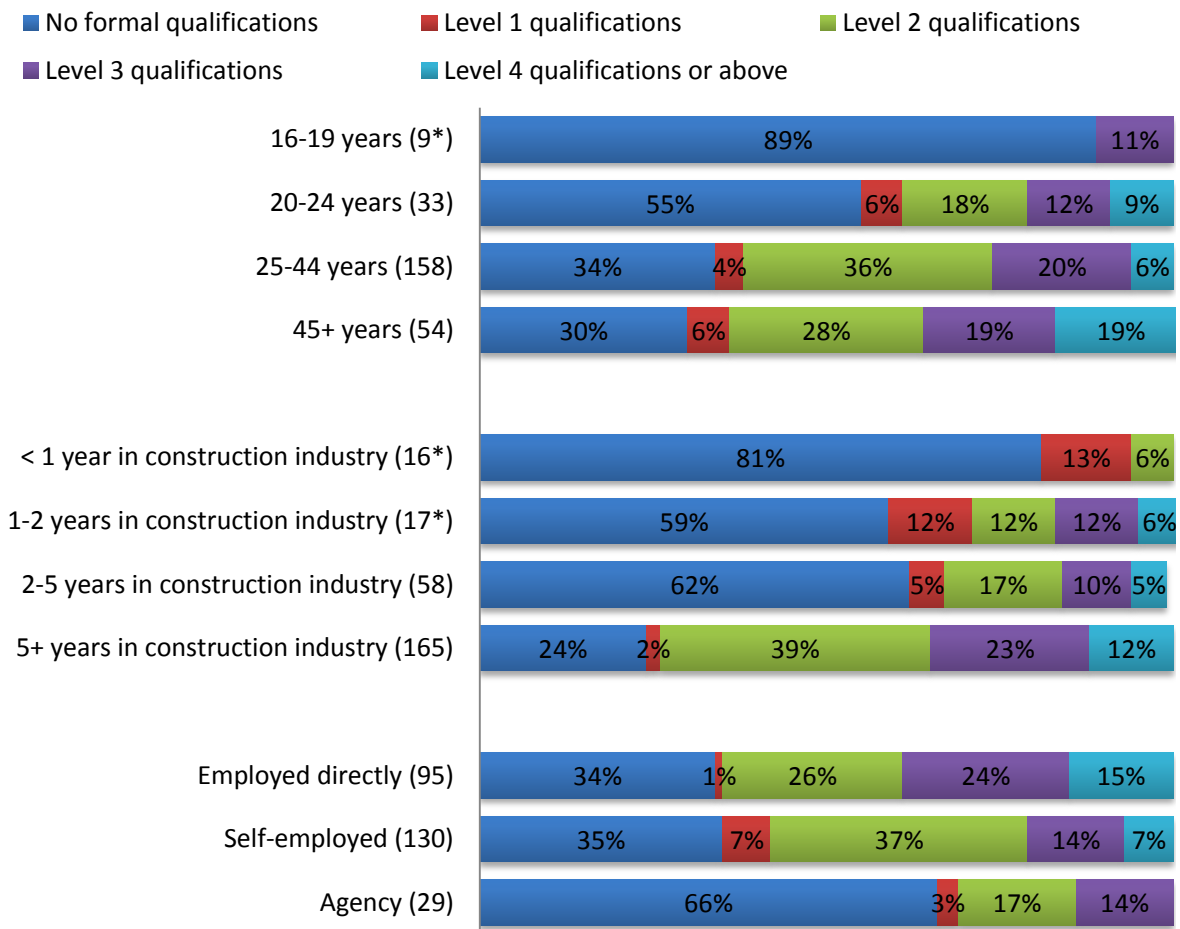


Looking at other sub-groups of construction workers, workers that have worked in construction for over 5 years are significantly more likely to have Level 2+ qualifications (74% cf. 27% of those with less than 1 years' experience).

In terms of contract type, workers employed directly are more likely to have Level 3 or above qualifications, compared to those who are self-employed or employed by an agency (39% cf. 21% of those self-employed, and 14% of agency workers). Figure 39 illustrates these variances and levels of qualifications held by other key variables.

Figure 39: Current qualification level, by other key variables

Base: All respondents who provided a valid response * caution: small sample base



Unweighted bases in parentheses Q15/Q16



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 current site is commuted to daily from their permanent address or temporary accommodation is used;
- Miles travelled to site each day;
- Whether next site is commutable or requires 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. Within London, similarly to across the UK as a whole, the most likely reason for working in a region/nation is because their employer sent them there (62%), the proportion who say it is because they grew up here/have always lived there is far below the national average (16% cf. 43%) but as mentioned previously the majority of London construction workers are non-UK nationals (51%).

Figure 40: Reasons for choosing to work in current location

Base: All respondents

	GL 2018/19 %	GL 2015 %	UK 2018/19 %		GL 2012 %
Employer sent you here	62	44	51	Employer sent me	41
You grew up here/have always lived here	16	35	43	Family	21
Family reasons	5	4	5		
Came to the area to take up this or another job	4	7	3	More regular opportunities	18
There are more jobs available in this area	16	16	5	More jobs here	29
Construction work is better paid in this area	8	11	3	Better paid jobs	23
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	2	2	2	Prefer living here	14
Better promotional prospects in this area	2	2	1	More chance of promotion	4
<i>Unweighted bases</i>	375	452	4048		410

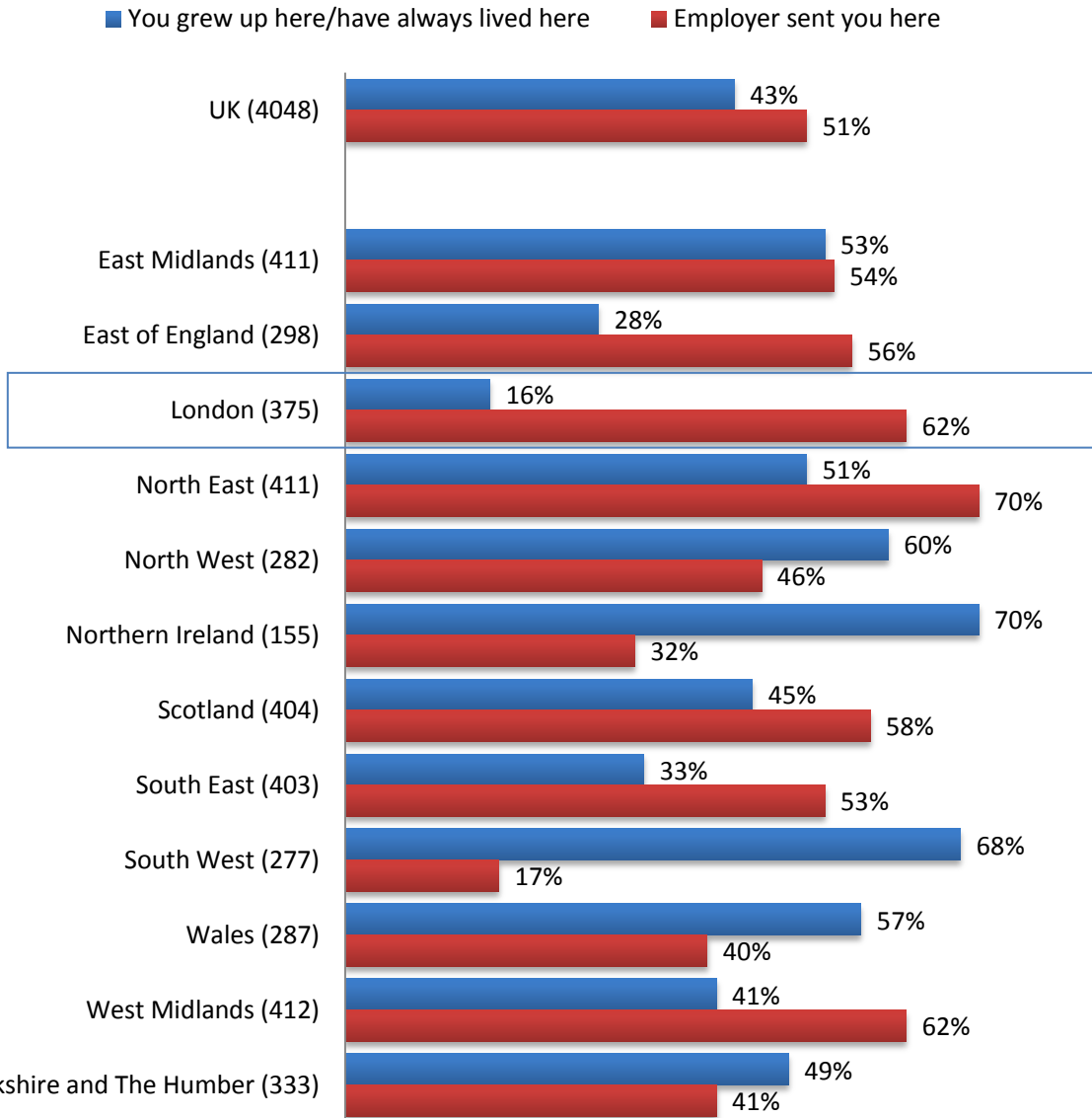
Q28



There are significant differences by region/nation in the proportions that give these two main reasons for working in their current location. These differences are summarised in the following figure. Construction workers in London are more likely than the UK average to cite that their employer sent them and less likely to cite having grown up/always lived there.

Figure 41: Top two reasons for deciding to work in their current region/nation, by region/nation

Base: All respondents



Unweighted bases in parentheses Q28



Just over two-fifths of all workers in London have worked within this region for their entire construction career (43%), compared with a similar proportion in 2015 (46%). With a further 37% that have remained in this region most of the time, this means the majority of all workers have remained in London for all or most of the time (79%).

Figure 42: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
All of your time	43	46	37	28	44
Most of it	37	38	34	43	33
Around half your time	9	8	16	17	9
A small proportion of your time	9	4	7	10	10
Only on this job (this is the first site you've been to in this region/nation)	2	2	2	1	2
Don't know	<0.5	2	3	1	1
<i>Unweighted bases</i>	<i>375</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4048</i>

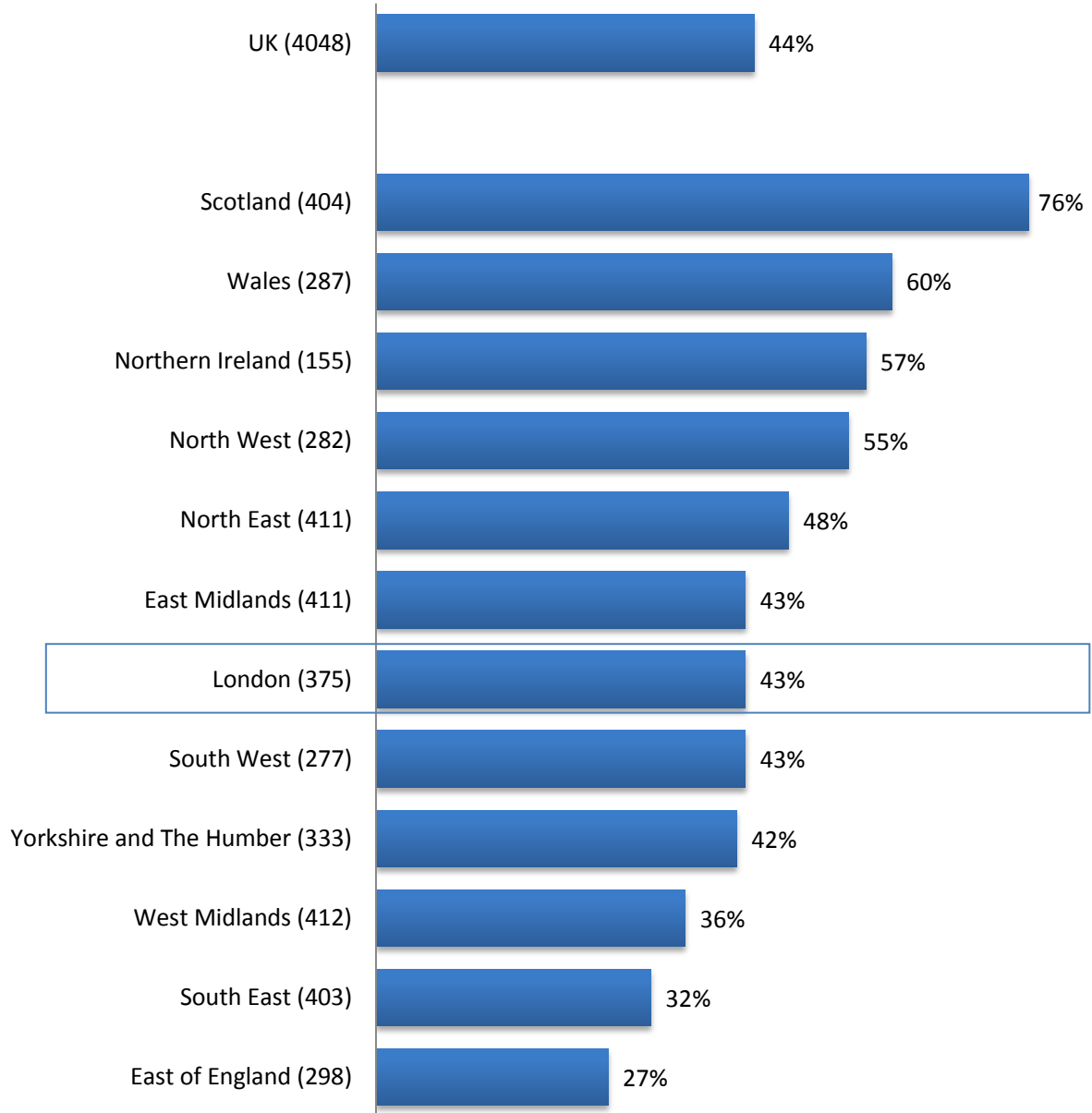
Q26/Q27



The proportion of construction workers in London who have spent all their time in London is in line with the UK overall.

Figure 43: Proportion of workers that have spent all their time in this current region/nation

Base: All respondents



Unweighted bases in parentheses Q26



The proportion of workers that reported their employer operates (takes on construction contracts) only within particular regions/nations, nationwide or internationally is shown in Figure 44. In London, three-quarters (74%) indicate their employer operates nationwide, with a further fifth (22%) stating their employer operates in particular parts of the UK including London, while 6% are unsure.

Figure 44: Region/nation employer operates in (takes on construction contracts), 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)	54	4	2	*	1	0	0	2	1	1	10	2
East of England (EE)	2	20	6	*	1	0	*	6	1	1	2	1
London (GL)	2	11	22	*	2	0	0	9	2	1	2	1
North East (NE)	1	*	2	46	1	1	0	*	1	1	2	2
North West (NW)	1	*	2	1	29	0	0	1	*	1	3	2
South East (SE)	2	8	9	*	1	1	0	26	7	*	2	1
South West (SW)	1	0	2	*	1	0	0	5	60	3	3	*
West Midlands (WM)	8	0	2	*	1	0	0	2	3	2	27	2
Yorkshire & Humber (YH)	4	3	2	2	2	0	0	1	1	1	2	32
Northern Ireland (NI)	1	1	2	0	*	69	0	*	*	*	0	0
Scotland (SC)	1	*	1	1	1	2	24	*	1	*	1	0
Wales (WA)	1	0	1	0	2	0	*	1	3	53	2	0
Nationally	42	69	74	52	69	25	76	66	37	45	66	66
Other parts of Europe	*	*	1	1	3	25	0	1	*	0	1	*
Outside of Europe	0	1	1	*	*	1	0	2	0	0	*	1
Other / Unsure	3	3	6	*	*	7	0	5	2	2	3	1
Unweighted bases	411	298	375	411	282	155	404	403	277	287	412	333

Q25



Region/nation worked in before current site

Thinking about the last construction site they worked on before this one, in the majority of cases, the worker's last site was 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 45 illustrates. Similarly to 2015, around three-quarters of construction workers in London state that their last site was in the same region (73% cf. 77%).

Figure 45: Region/nation of last site before this current one

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)	79	2	*	1	0	0	0	4	*	0	16	4
East of England (EE)	4	52	6	1	0	0	0	11	1	*	1	*
London (GL)	4	31	73	2	*	1	*	14	4	*	1	3
North East (NE)	0	*	0	90	0	1	*	0	0	*	1	2
North West (NW)	1	0	*	2	91	1	0	1	1	*	4	3
South East (SE)	1	11	16	0	0	1	*	62	8	1	2	*
South West (SW)	1	1	*	0	0	0	*	3	81	4	1	1
West Midlands (WM)	7	1	1	0	*	1	1	3	*	0	71	2
Yorkshire & Humber (YH)	3	0	1	2	2	1	0	*	*	0	1	83
Northern Ireland (NI)	0	0	1	0	1	93	1	0	0	0	0	0
Scotland (SC)	0	*	1	2	1	2	98	0	*	*	*	1
Wales (WA)	0	*	*	0	2	0	0	1	2	88	1	0
Republic of Ireland	0	0	*	0	0	0	0	0	0	0	0	*
Other parts of Europe	0	0	0	0	*	0	0	0	0	0	1	0
Outside of Europe	0	0	0	0	1	1	0	0	0	0	0	0
Other / Unsure	1	2	1	*	1	0	0	1	1	6	1	*
Unweighted Bases	347	284	353	283	243	151	369	382	251	256	366	304

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 more than three-fifths of all construction workers in London were living in London when they started their construction career (59% cf. 50% in 2015). This compares with other regions/nations where the proportion is significantly higher (Scotland at 96%; Northern Ireland at 95%) and those where the proportion is significantly lower (East of England at 44%; South East at 51%). Figure 46 summarises this data.

Figure 46: Inter-regional/national movement during construction careers

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

Original home	Region/nation currently working in											
	EM %	EE %	GL %	NE %	N W %	NI %	SC %	SE %	SW %	W A %	W M %	YH %
East Midlands (EM)	82	6	2	0	*	0	*	9	*	1	12	2
East of England (EE)	1	44	6	*	0	0	0	9	2	0	1	1
London (GL)	2	26	59	1	3	0	0	13	6	1	1	4
North East (NE)	1	*	*	93	0	0	*	1	*	1	*	5
North West (NW)	1	*	1	1	87	1	*	1	1	0	4	2
South East (SE)	1	14	15	*	1	1	0	51	5	0	1	1
South West (SW)	*	1	*	*	1	1	0	4	76	1	1	*
West Midlands (WM)	7	2	2	0	*	0	0	5	1	*	71	1
Yorkshire & Humber (YH)	4	3	1	2	3	1	*	2	1	1	2	81
Northern Ireland (NI)	0	0	4	0	1	95	*	1	0	*	0	*
Scotland (SC)	*	0	1	1	1	1	96	1	1	1	0	1
Wales (WA)	0	*	*	*	1	0	*	1	3	93	1	1
Republic of Ireland	0	*	3	0	0	0	1	*	0	0	*	*
Other parts of Europe	*	1	4	*	0	0	1	2	2	*	3	*
Outside of Europe	*	*	1	0	*	1	0	0	0	*	1	0
Other / Unsure	0	1	0	0	0	0	*	0	0	1	0	1
<i>Unweighted Bases</i>	411	298	375	411	282	155	404	403	277	287	412	333

Q40



Thinking next about where workers studied for their first construction qualification, Figure 47 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that while once again there are great variations by region/nation, three-fifths of construction workers in London (59%) achieved their first qualification there.

Figure 47: Proportion of construction workers based in the same region/nation as when their first qualification was achieved

Base: Those with a formal qualification who provided a valid response

	2018/19 %	2015 %	Higher than average mentions for other regions/nations
Scotland (304)	96	95	
Northern Ireland (87)	93	96	
North East (283)	90	92	
Wales (197)	86	83	
North West (222)	85	90	
Yorkshire & the Humber (232)	81	82	
East Midlands (264)	80	65	West Midlands 9%
South West (208)	75	76	South East 7%
West Midlands (254)	69	79	East Midlands 14%
London (277)	59	58	South East 16%, East of England 7%
East of England (230)	47	50	London 24%, South East 13%
South East (312)	41	55	London 16%, East Midlands 12%, East of England 10%
<i>Unweighted bases for 2018/19 in parentheses</i>			

Q17



Travel to site

Relative locations of current workplace to home

The majority of construction workers were interviewed on a site that was located within the same region/nation as their permanent home, but the exact proportion working in their region/nation of residence varied.

Two in five construction workers in London are travelling into the region for work from another region/nation in which their current residence is based (37%) and this is a higher proportion than in 2015 (29%) but the same as in 2012 (37%).

Figure 48: Inter-regional/national movement from permanent residence to current site

Base: All respondents who provided a valid response

	2018/19			2015		
	% from same region/nation	% from different region/nation	% from neighbouring region/nation	% from same region/nation	% from different region/nation	% from neighbouring region/nation
Northern Ireland (145)	100	0	-	99	1	-
Scotland (196)	100	0	0	96	4	0
Wales (258)	98	2	2	93	7	5
North East (335)	96	4	4	97	3	1
North West (257)	94	6	6	88	12	12
South West (243)	94	6	6	85	15	11
East Midlands (309)	90	10	10	74	26	23
Yorkshire and the Humber (290)	88	12	9	86	14	14
West Midlands (308)	80	20	19	82	18	16
London (341)	63	37	32	71	29	25
East of England (270)	60	40	36	63	37	27
South East (362)	55	45	42	58	42	38

Unweighted bases for 2018/19 in parentheses

Q52/Q54



The extent to which construction workers live in the same region/nation in which they work is further illustrated in Figure 49. Two thirds of construction workers working on London sites are living in the region (63%), which compares with 71% in 2015. The majority of those that are travelling from a different region are living in the East of England (18%) or the South East (14%), both neighbouring regions.

Figure 49: 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	90	9	0	0	0	0	0	11	0	*	14	6
East of England	1	60	18	0	0	0	0	10	0	0	*	0
London	0	16	63	0	0	0	0	9	0	0	*	1
North East	0	0	*	96	0	0	0	0	0	0	0	2
North West	*	0	*	*	94	0	0	0	0	0	4	1
Northern Ireland	0	0	2	0	0	100	0	1	0	0	0	0
Scotland	0	0	1	1	0	0	100	*	0	0	0	0
South East	1	11	14	0	0	0	0	55	2	0	0	*
South West	0	1	0	0	0	0	0	9	94	2	*	0
Wales	0	0	*	0	1	0	0	2	2	98	1	0
West Midlands	6	2	1	0	0	0	0	4	2	0	80	1
Yorkshire and the Humber	2	1	1	3	5	0	0	*	0	0	1	88
Unweighted bases	309	270	341	335	257	145	196	362	243	258	308	290

Q52/Q54

Furthest distance worked in last 12 months

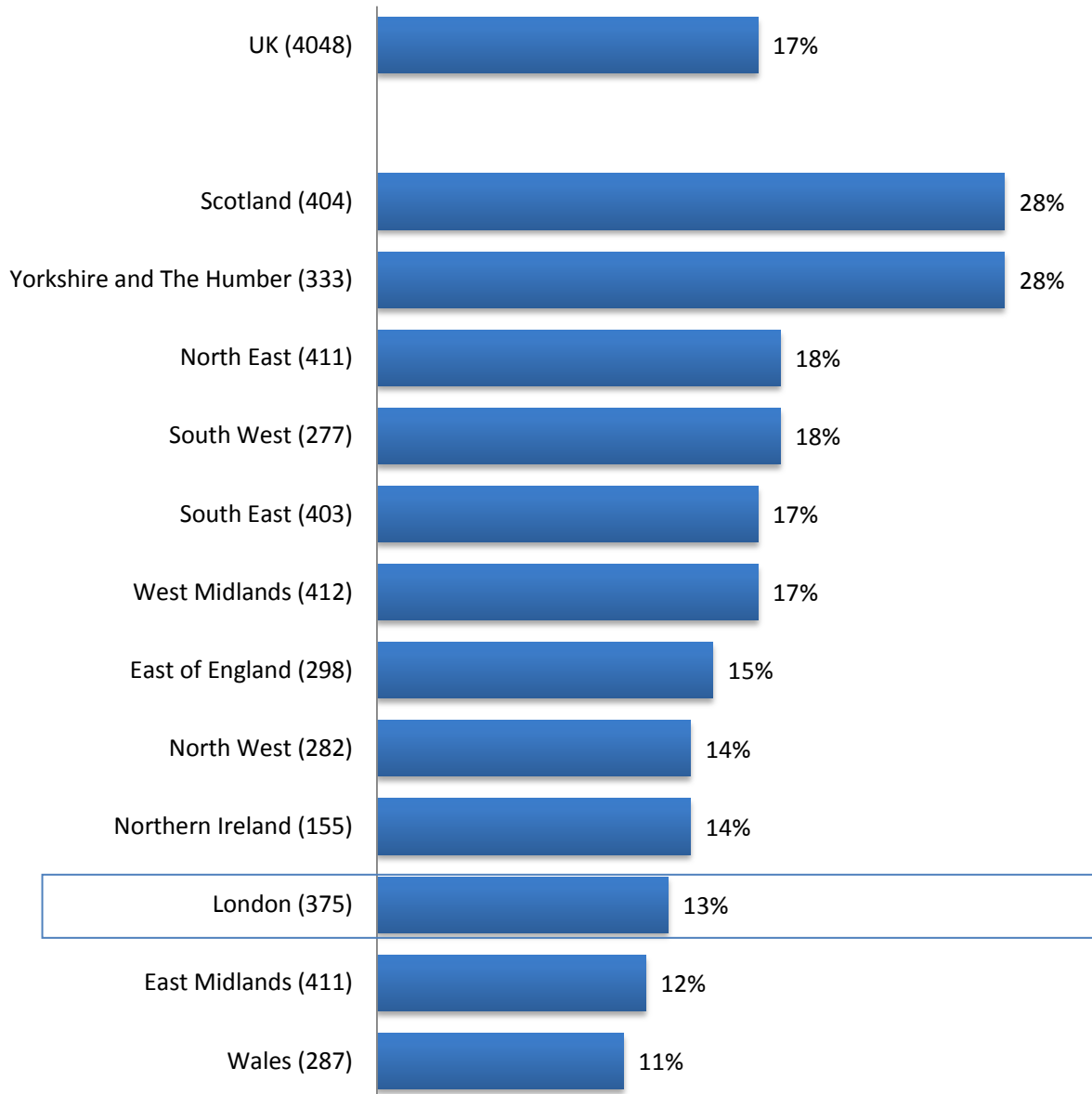
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within London, around 1 in 3 construction workers have worked between 21-50 miles away (28%), with a third (36%) having worked no more than 20 miles away. The average maximum distances travelled to work by London construction workers in 2018/19 is consistent with in 2015 when 35% had ever worked no more than 20 miles from their home. This leaves 1 in 3 that have worked more than 50 miles away from their permanent home (34%), with 1 in 5 that have worked between 51 and 100 miles away (21%) and 1 in 8 that have worked more than 100 miles away (13%).



Compared with workers in other regions/nations, workers based in London are amongst the least likely (13%) to have travelled more than 100 miles from their permanent home to work in the last 12 months.

Figure 50: 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



Unweighted bases in parentheses Q29



Use of temporary accommodation

Nationally, 1 in 20 (5%: 6% in 2015) construction workers reported that they were currently staying in temporary accommodation while working at their site. By region/nation, the proportion is highest in London (10%).

Figure 51: Percentage of workers in temporary accommodation

Base: All respondents

	2018/19 %	2015 %
Total - UK (4048)	5	6
London (375)	10	8
South East (403)	7	6
West Midlands (412)	6	3
East of England (298)	5	11
South West (277)	3	7
East Midlands (411)	3	5
North West (282)	3	2
Yorkshire and The Humber (333)	3	4
Wales (287)	3	4
Northern Ireland (155)	3	3
Scotland (404)	2	7
North East (411)	1	4
<i>Unweighted bases for 2018/19 in parentheses</i>		

Q41/Q42

Journey distance to work

Within London, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 16 miles, which is below the average of 19 miles reported in 2015, and considerably less than the average of 30 miles reported in 2012. The London mean compares to a mean of 18 miles across the UK.

Nearly half (49%) travelled less than 10 miles from their current residence to the site they work, whilst 22% travelled between 10 and 19 miles, 26% travelled between 20 and 49 miles, 2% travelled between 50 and 99 miles and 1% travelled more than 100 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (35% of all construction workers in London) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 12% expect to work for another week or so, or less; 12% expect another month; 8% between a month and 3 months; 8% between 3 and 6 months; 13% between 6 months and a year and 8% expect to still be working for their current company/agency in more than a years' time. Two fifths of the



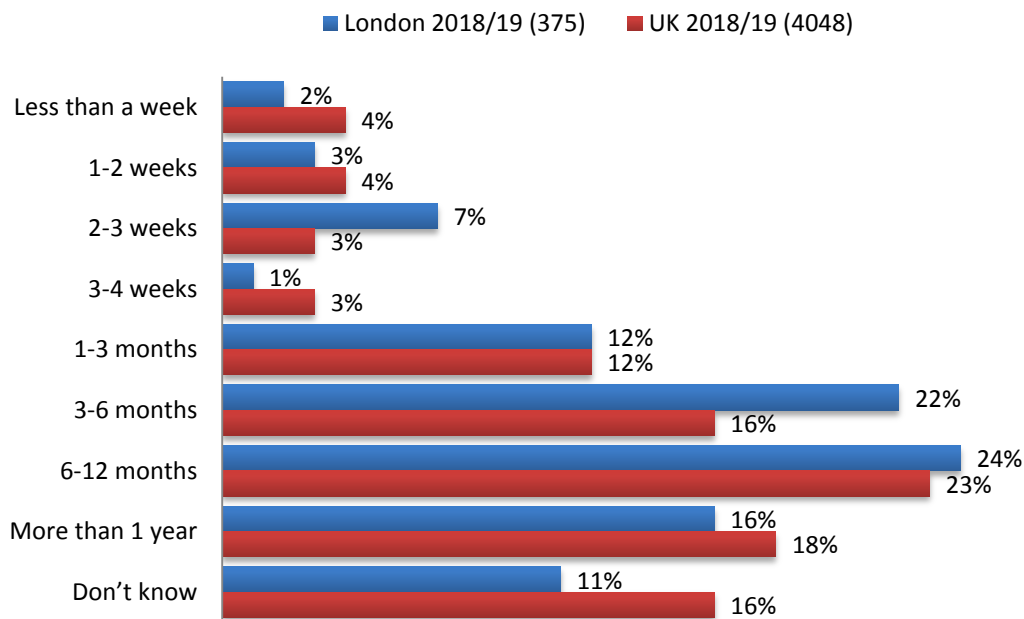
temporary workers in the region did not know how much longer they could expect to be working for their current company/agency (40%; 38% across the UK).

In order to get a measure of workplace stability amongst all 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.

Just 1 in 8 construction workers in London (14% cf. 25% in 2015 and 22% in 2012) do not expect to work on the site for more than a month, including 2% that only expect to be there for a week or less. Three-fifths anticipate being on site for more than a month, but less than a year (58%), while a sixth expect to stay on the site for a year or longer (16%), which is a slight decrease compared with 2015 (19%) and slightly lower than the UK average in 2018/19 of 18%. However, in one in ten cases (11% cf. 22% in 2015 and 26% in 2012) workers did not know how much longer they could expect to be on site, indicating that a decreasing minority of construction workers are living with a certain amount of uncertainty and insecurity.

Figure 52: Length of time workers expect to work at that specific site during the current phase

Base: All respondents



Unweighted bases in parentheses
Q24

The youngest workers, aged 16-19 are also more likely to be unsure of how much longer they can expect to work for (33% don't know, although this is based on a small sample size).

Amongst the various trades/job roles, site managers (32%) and technical workers (31%) are more likely to indicate that they expect to work at that site for more than a year; whilst bricklayers (8%), and carpenters/joiners (3%) are least likely to indicate that this is the case.



Expected next site location

Almost nine in ten construction workers in London are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis, and this is a higher proportion than in previous surveys (89% cf. 71% in 2015 and 65% in 2012). The remaining tenth of workers are sure that this will not be the case (3%); that it depends where the work is (3%); or that they don't know (3%).

Construction workers in London are above the UK average in this respect (84%).

Construction workers who have worked in construction for the longest period of time are more likely to be confident of this (91% of those who have worked in the industry for 5+ years, cf. 86% of those who have worked in construction for less than 5 years). By trade/occupation, carpenters/joiners (97%) and electricians (96%) are the most confident.

Workers that are certain that their next job will not be within commuting distance of their permanent home were asked to indicate which region/nation they expect to be working in next. The following figure summarises their responses by region/nation (although the base sizes within each region/nation are very small, so some caution is needed) and it gives an indication of the likely pattern of movement between regions/nations. Four-fifths of construction workers in London (85%) that do not expect to be able to commute daily to their next job expect to remain in the region for their next job. The remainder expect their next site will be in the West Midlands (8%) or are unsure.

Figure 53: Expected location of next site/job

Base: Where workers do not expect to be able to commute daily to their next job

* denotes less than 0.5%

Expected location of next job	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	79	0	0	0	0	0	0	0	7	0	0	0
East of England	0	21	0	0	0	0	0	8	0	0	4	0
London	11	21	85	7	0	20	0	17	7	29	7	14
North East	0	0	0	86	0	20	0	0	7	0	4	7
North West	0	7	0	0	44	0	0	8	0	0	4	7
Northern Ireland	0	0	0	0	0	40	0	0	0	0	0	0
Scotland	0	0	0	0	33	20	100	0	0	0	0	0
South East	0	7	0	0	0	0	0	25	0	0	0	0
South West	0	0	0	0	11	0	0	8	64	0	0	0
Wales	0	7	0	0	0	0	0	0	0	43	0	0
West Midlands	11	7	8	0	0	0	0	17	0	0	68	7
Yorkshire and the Humber	0	0	0	0	0	0	0	0	0	0	0	64
Outside Europe	0	0	0	0	0	0	0	0	0	0	4	0
Other / Unsure	0	29	8	7	11	0	0	17	14	29	11	0
Unweighted bases	19	14	13	14	9	5	13	12	14	7	28	14

Q31



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 spent periods of at least 3 months at a time working in.

Following on from 2015, the vast majority of construction workers in the London have worked on new housing (67%, 73% as in 2015). On the contrary, the proportions of workers that have worked on every other type of project has increased, considerably so in some cases.

Overall more than a quarter of all construction workers have only worked on one project type (28%), a decrease on 2015 (51%), with 30% reporting working on 5 or 6 types of projects. This suggests that more construction workers now work on a wider variety of projects than in 2015, indicating less stability in terms of the sub-sectors in which work has been available but also greater flexibility among the workforce.

Figure 54: Type of projects spent significant periods on

Base: All respondents

	GL 2018/19 %	GL 2015 %	GL 2012 %	GL 2007 %	UK 2018/19 %
New housing	67	73	66	65	79
Housing repair and maintenance including extensions/loft conversions	47	29	36	53	46
Commercial work such as shops, office, pubs etc	62	36	39	53	51
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	46	26	34	38	45
Public non-housing work such as schools, sports facilities, landscaping	55	31	37	49	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	37	25	35	19	31
ONE TYPE ONLY	28	51	37	29	30
TWO TYPES	16	16	23	19	16
THREE TYPES	13	8	12	19	14
FOUR TYPES	13	8	12	12	12
FIVE TYPES	14	8	7	14	13
SIX TYPES	16	7	7	6	14

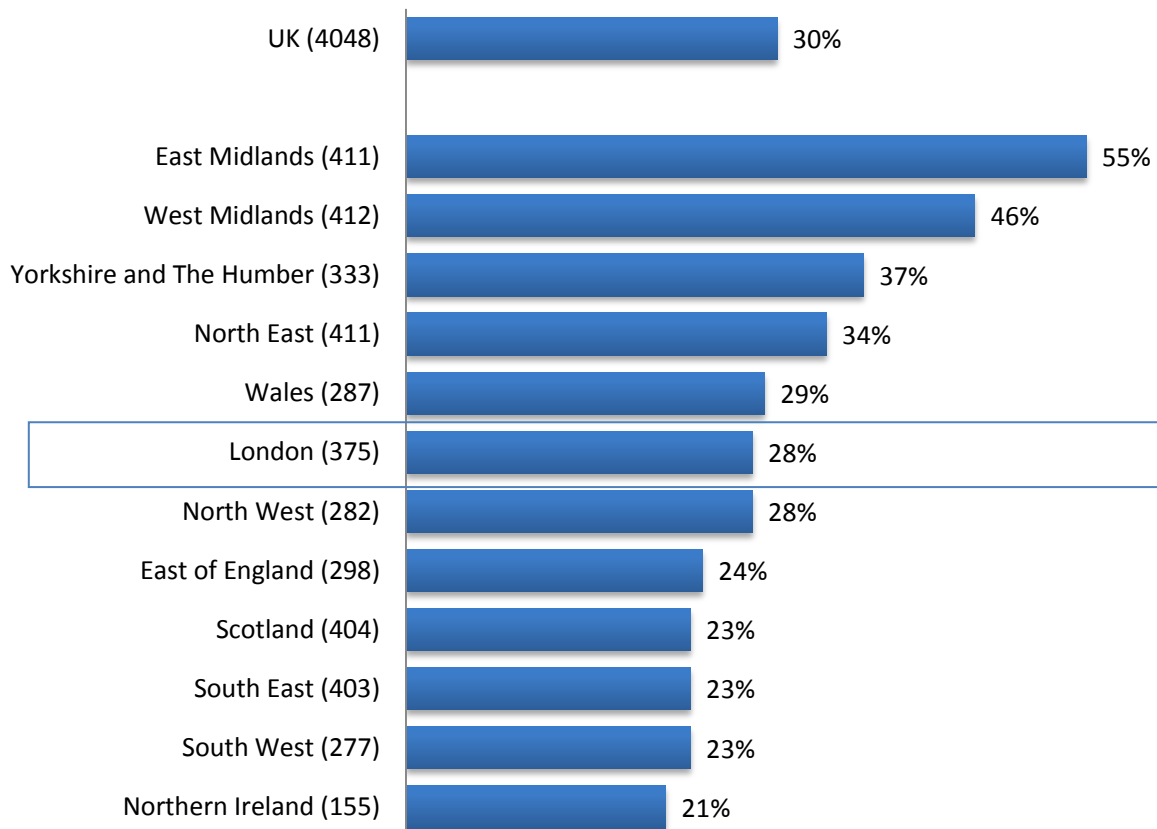


<i>Unweighted bases</i>	375	452	410	355	4048
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Q3/Q4

The number of project types worked on varies significantly by region/nation, as Figure 55 illustrates. London is consistent with the national average for construction workers working on one project type (28% cf. 30% in the UK).

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



Unweighted bases in parentheses Q4



The likelihood that workers have worked only on one project type declines as age increases, as one would expect (from 56% of 16 to 24 year olds to 15% of 45+ year olds). By current trade/occupation, the proportion is lowest amongst electricians (12%) and highest among technical workers (51%).

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

Base: All respondents *Caution: Small sample base

	Unweighted bases	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Bricklayers	24	29	13	21	4	13	21
Carpenters/joiners	37	32	11	14	11	16	16
Electrician	26	12	12	8	23	19	27
Labourers/general operatives	45	40	27	11	9	7	7
Site manager	62	19	21	18	15	11	16
Technical	35	51	14	6	17	6	6

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. Overall, three quarters (74%) felt it was very likely that they would still want to, which is the same as the UK average (74%). This included, within London, 42% of construction workers who say they definitely will be, 32% say they very likely will be, and 11% say they quite likely will be. 4% consider it unlikely; just 1% say they definitely won't be and a further 3% hope to be retired by then, while 7% don't know.

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years time increases to 14% of construction workers aged 45 and over and 50% of those aged 60 and over. The proportion that felt they definitely would still want to work in the construction sector in five years is highest amongst workers aged 20-24 (44%), but does not decline much with workers' age.



Figure 57: Likelihood of construction workers still wanting to be working in the construction sector in five years time

Base: All respondents

	GL 2018/19 %	UK 2018/9 %	Age			
			16 to 19 %	20 to 24 %	25 to 44 %	45+ %
Definitely will be	42	48	22	44	42	40
Very likely	32	26	11	40	33	29
Quite likely	11	11	44	9	11	8
Quite unlikely	2	2	0	0	3	0
Very unlikely	2	2	0	2	1	4
Definitely will not be	1	1	0	0	2	1
Hope to be retired	3	4	0	0	0	14
Don't know	7	5	22	5	8	3
<i>Unweighted bases</i>	<i>375</i>	<i>4048</i>	<i>9</i>	<i>43</i>	<i>227</i>	<i>93</i>

Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 41% believe they will definitely want to be working in the construction sector, 33% believe it is very likely they will want to be working in the construction sector and 11% believe it is quite likely they will want to be working in the construction sector. Only 5% think on any level that they will not want to be working in the construction sector in 5 years time which is less than in 2012 (11% in 2015 and 12% in 2012).

Overall, 5% of all construction workers felt it was unlikely that they would still want to work in the construction sector in five years time. These workers were asked the reasons why. They were most likely to cite the fact that work outside of construction might be less physical (42%), while a similar proportion thought they might find more interesting work outside of construction (or that they would be bored of what they are doing now and need a change) (37%), and almost a third want more suitable hours/conditions (32%). This is closely followed by the desire to be better paid (26%) and to use their skills/abilities better (21%).



The London construction workforce 2018-19 summary

Across the wide range of issues covered within the 2018/19 survey there are indications of more flexible, adaptive working patterns across the UK construction workforce and this is reflected to some degree among the London workforce. Within London there has been an increase in the proportion of workers employed directly by companies, from 39% in 2015 to 43% in 2018/19, and there has been a corresponding decrease in the proportion that are self-employed (from 51% in 2015 to 47% in 2018/19). More workers in London than UK-wide are employed on a temporary basis in 2018/19 (35%, compared to 28%).

Workers in the region, on average, travel slightly shorter distances to their current site than the UK average and the distance they travel has decreased since 2015 from 19 miles to 16 miles. Across the regions, they are amongst those least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (13%, compared with a UK average of 17%).

London construction workers are more likely to report that they work at their current site because their employer sent them there (62%). They are far less likely than the UK average to report being long term residents of the area in which they currently work. For London workers the majority were also based in the region for their last job (73%). Longer term, over the course of careers in construction, London workers are less likely compared with those in other regions in their propensity to have remained in the same region in which they started their careers (59%, compared with 96% in Scotland and 44% in the East of England) or in which they obtained their first qualification/training in construction (59%, compared with 96% in Scotland and 41% in the South East).

Uncertainty with regard to the duration of temporary employment within London is similar to the average across the UK; 40% do not know how long they expect to continue with their current employer/agency, compared with a UK average of 38%.

London workers are among the most confident, of any region or nation, that their next job will be at a location that will allow them to travel to work from their permanent home on a daily basis (89%).

London construction workers are more likely to have worked in more than one trade than they were in 2015 (44%, compared to 36% in 2015) but more likely to have worked in just one project area (28%, compared to 51% in 2015).

In terms of skills and qualifications it is encouraging to note that the vast majority of London construction workers continue to hold some form of skill card or certificate. In London this proportion is consistent with the UK average (98%, compared with 97%). There are similar proportions of qualified workers in the region compared with the UK (74% in London hold construction-specific qualifications cf. 72% across the UK) and around a fifth of workers in London are working towards a construction qualification (19% cf. 15% across the UK).

One in five construction workers in London in 2018/19 believe they would benefit from training in basic skills (19%) and this proportion has fallen since 2015.



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