

Workforce Mobility and Skills in the UK Construction Sector 2015

Greater London Report





Study prepared by BMG Research from a commission by CITB.

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Author: BMG Research

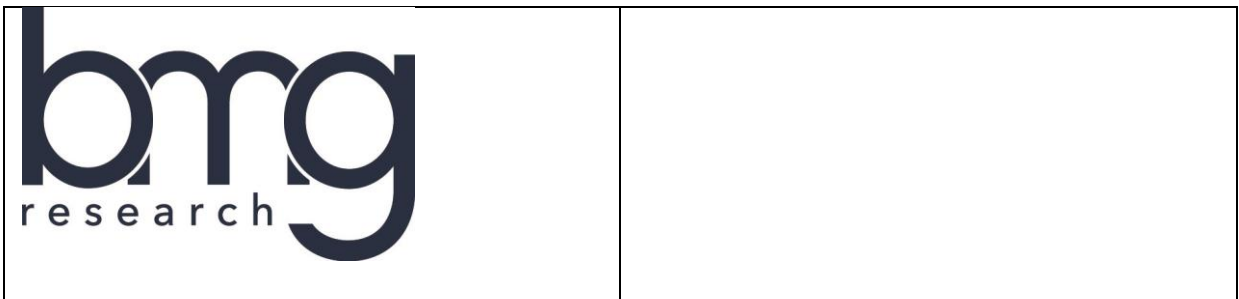




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Executive summary

Introduction

- CITB commissioned BMG Research to undertake the 2015 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2012, 2007 and 2005. Face to face interviews were conducted with 4771 construction workers undertaking manual roles on sites across the UK and 452 interviews were conducted with construction workers in Greater London.

Profile of the sample

- Just under half the construction workers interviewed in Greater London are aged below 35 years (48%), which is a higher proportion than compared with the UK population as a whole (37%), but similar to the UK average in the survey (47%). Just 4% of construction workers are aged 60 or over.
- Overall 15% of the Greater London construction workforce is of BME ethnic origin, compared with a higher incidence of 36% in the Greater London population as a whole. The UK average in the survey is 4% and 10% across the UK population as a whole.
- By trade/occupation, the highest proportion of the Greater London sample is accounted for by labourers/general operatives (17%). Compared with 2012 the proportion that are labourers/general operatives has declined (from 22%) and carpenters/joiners also account for a lower proportion of construction workers than in 2012 (declining from 15% to 8%).
- More than a quarter of all those interviewed in Greater London perform a supervisory or management role on their site (28%); a higher proportion than nationally (25%).
- Around two fifths of construction workers interviewed for the survey in Greater London are employed directly by a company (39%); a similar proportion to 2012 (38%). The proportion of workers that are self-employed has also remained the same since 2012 (51%) and the proportion of workers working for an agency has remained at a similar level (9% in 2015; 11% in 2012). The likelihood of being employed by an agency is highest amongst those that have worked in construction for less than a year (19%).
- More than a third of all construction workers in Greater London (36%) are employed on a temporary, rather than permanent basis. This is a higher proportion than the UK average (23%). By occupation the proportion is highest amongst labourers/general operatives and plant and machine operatives (both 60%).
- Construction workers in Greater London work an average of 46 hours per week, which includes more than two fifths that work more than 50 hours per week (42%). Greater London construction workers are significantly more likely to work more than 50 hours per week than the UK average (23%).



Work history

Time in the sector

- Around a fifth of all Greater London construction workers have worked in the industry for at least 20 years (19%), which compares with a higher UK average (31%). More than two fifths have done so for 10+ years (43%).
- Two thirds of construction workers in Greater London have only ever worked within the construction industry (67%) and this is similar to the UK average (70%). More than half of Greater London construction workers (53%) have worked pretty much continuously, without spells out of work and, again, this is a similar proportion to the UK average (55%).

Previous non-construction jobs

- Amongst the 1 in 4 construction workers in Greater London that worked in another sector (25% of all respondents) before starting work in construction, the sectors worked in beforehand are most likely to be either the wholesale/retail sector (27%) or manufacturing (14%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trades occupations (21%), followed by associate professional and technical or elementary administrative and service occupations (both 18%).

Occupational switching within the construction sector

- More than a third of all construction workers in Greater London have worked in more than one construction trade or occupation whilst working in the construction industry (36%). The proportion that has worked in more than one role is significantly higher amongst those with a supervisory or management role on site (42%).
- Workers are most likely to have previously worked as a labourer/general operative (33%); while 1 in 5 have worked as a carpenter/joiner (20%) and 1 in 6 as a painter/decorator (16%).
- Thinking about their future plans in the construction sector, nearly three quarters of construction workers in Greater London would like to carry on in the same trade or occupation (73%), while 1 in 8 would like to change their trade/occupation (13%) and a further 1 in 20 would like to leave the construction altogether (6%). The proportion that wants to carry on as they are is lower in Greater London than the UK average (79%).
- The most popular occupation that construction workers in Greater London would like to change to is site manager (25% of those who would like to change).
- In more than four fifths of cases where Greater London construction workers would like to change trade/occupation they believe they will require further training or qualifications in order to do so (88%). This is a higher proportion than the UK average (77%).
- The main reason for wanting to change trade/occupation is the belief that workers will be better paid (58%), followed by workers wanting to use their skills/abilities better (39%).



Qualifications and skills

Skills cards/certificates

- The vast majority of all construction workers in Greater London, as across the UK as a whole, hold some form of construction skill card or certificate (98% cf. 96% in 2012 and a UK average of 96%).
- Less experienced workers i.e. those who have worked in construction for less than a year (92%) remain less likely to hold a skill card/certificate. Since 2012, there has been a particular improvement amongst workers aged 20 to 24 years in this respect (from 88% in 2012 holding cards/certificates, to 96% this year).
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (89% in Greater London; 86% across the UK).
- Card colours vary by age and particularly by occupation; labourers/general operatives (77%) and roofers (64%) are most likely to hold Green cards; scaffolders (44%) and banksman/bankspersons (36%) are most likely to hold Blue cards; and electricians (41%), and plumbers (33%) are most likely to hold Gold skill cards.

Construction-specific qualifications

- More than four fifths of construction workers in Greater London say they had no formal qualifications when they first started working in the construction industry (83%). This compares with a lower UK average (75%).
- By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst plasterers (100%), labourers/general operatives (98%), painters/decorators (95%) and scaffolders (94%) whilst site managers (54%) and electricians (76%) are least likely to have started with no formal qualifications.
- Compared with just 1 in 6 construction workers in Greater London that did have qualifications when they first started working in construction (17%), overall, more than half of all construction workers in the region/nation reported holding some sort of construction related qualification at the time of interview (52% cf. 60% in 2012 and a UK average of 63%).
- The proportion of workers that currently hold any qualifications is lower than average amongst workers who have worked in construction for less than a year (33%) and workers employed by an agency (37%).
- Within Greater London, around three fifths of the youngest age group hold qualifications (58% of 16 to 19 year olds), which is (statistically) on a par with other age groups.
- By trade/occupation proportions vary from around 4 in 5 electricians, scaffolders and plumbers, down to 1 in 4 labourers/general operatives.
- The qualifications most likely to be held by construction workers in Greater London are NVQ/SVQ qualifications (68% of those with qualifications) and this is a lower proportion to that reported in 2012 (72%) and similar to the UK average (66%). One in six construction workers in the region/nation with qualifications hold City & Guilds qualifications (18%; 10% in 2012 and



compared with 20% across the UK). Whilst 1 in 20 construction workers with qualifications now hold an apprenticeship (6%), which is a significant increase compared with 2012 when none (in the survey) did and lower than amongst construction workers across the UK (13%).

Basic skill needs

- A quarter of construction workers in Greater London believe they would benefit from some form of training in basic skills (26%); the same proportion as in 2012. The proportion in Greater London is higher than the UK average (14%).
- In terms of the type of training required there is an almost even split across reading, writing and maths (9%, 9% and 6% of all respondents respectively) but a higher proportion specify speaking English (16%).

Current study for qualifications

- One in seven construction workers in Greater London are currently working towards any formal qualifications relevant to the construction industry (14% cf. 12% in 2012 and a UK average of 12%). This proportion is significantly higher amongst younger workers (31% of 16 to 19 years olds; 27% of 20 to 24 year olds).
- Amongst workers with no qualifications 1 in 9 are currently working towards a qualification (11%).
- In aggregate, three fifths of those who are working towards qualifications are working towards qualifications equivalent to Level 2 (24%) or 3 (35%).

Supervisory/managerial training

- Of those not currently performing a supervisory/management role two fifths are certain that they would not like to do so (41%; 53% across the UK), while a further two fifths would like to do so (40%; 26% across the UK) and around a fifth are unsure (19%; 21% across the UK).
- More than a quarter of all construction workers in Greater London (27%) and around three quarters of those who have had some form of supervisory or management responsibilities (74% cf. 87% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions are similar to the UK average.
- SMTS (46%) is the type of training most likely to have been received, followed by a Site Safety Supervisors Course and in-house training (both 26%).

Overall skill levels

- The vast majority of construction workers in Greater London (98%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. Two fifths of Greater London construction workers (40%) hold a skill card/certificate, but have no other construction qualification. This compares with a UK average of 30%.



- Overall, while nearly half the construction workers in Greater London have no qualifications (48% cf. 40% in 2012 and a 2015 UK average of 37%) half have qualifications equivalent to Level 2 or above (50% cf. 49% in 2012 and 58% across the UK in 2015). More than a quarter of all Greater London construction workers hold qualifications equivalent to Level 3 or above (27%); this proportion is higher than average amongst electricians (73%) and plumbers (50%).

Geographic mobility

Work history in the region/nation

- The main reason for construction workers locating in Greater London is that their employer sent them there (44% of cases). The fact that they grew up there/have always lived there and other family reasons are next most frequently cited as reasons why construction workers are based within Greater London (39%) and this proportion is higher than in 2012 (21%) but lower than the 2015 UK average (61%). Reasons differ particularly by age with younger workers more likely to say their employer sent them, while older workers are more likely to cite family reasons.
- In 2015, a higher proportion of construction workers in Greater London compared with 2012 have worked within their current region/nation for their entire construction career (46% cf. 37% in 2012) and the majority of construction workers in the region/nation have remained in Greater London for all or most of their career (84%). This compares with a UK average of 80%.
- Thus, in the majority of cases, the last site workers were based at was also in Greater London (77%).

Worker origins

- Half of all construction workers in Greater London were interviewed in the same region/nation in which they were living in when they started their construction career (50%). By region/nation, workers currently based in Greater London are the least likely to have remained in the same region/nation in which they were based for their first construction job.
- More than half the construction workers in Greater London (58%) have remained in the same region/nation as they did their first qualification/training in. Compared with other regions/nations, they are amongst the most mobile. The highest proportion by region/nation is 96% in Northern Ireland, followed by 95% in Scotland and 92% in the North East. At the lower end of the range and alongside Greater London only around half of construction workers in the East of England (50%) and South East (55%) are based in the same region/nation as where their first qualification was achieved.

Travel to site

- Around two thirds of construction workers in Greater London have travelled at least 50 miles from their permanent/current home to work in the last 12 months (64%). Across the regions/nations, Greater London construction workers are least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (12%).



- Overall 8% of construction workers in Greater London (5% in 2012) are currently staying in temporary accommodation while working at their site. This proportion is slightly higher than the UK average (6%).
- The average (mean) distance from Greater London's construction workers' current residence (taking into account temporary residences) to their current site was 19 miles (22 miles is the UK average) which is less than in 2012 when workers travelled an average (mean) of 30 miles.

Site duration and change

- More than a third of temporary workers in Greater London (36%) do not know how much longer they can expect to be working for their current company/agency. This compares with a higher UK average of 43%.
- 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 fifth expect to stay on that site for a year or longer (19% cf. UK average of 26%), which is a significant increase compared with 2012 (14%), suggesting some improvement with regard to stability. However a further fifth of workers (22% cf. 26% in 2012) do not know how much longer they can expect to be on site, indicating there is still a considerable degree of uncertainty.
- Seven in ten Greater 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 (71% cf. 65% in 2012). The remaining 3 in 10 say it depends/they don't know or that they won't be able to commute. Compared with workers in other regions/nations, those in Greater London are positioned in the mid range of those most confident in this respect (Scotland, 81%) and those least confident (Northern Ireland, 68%).

Sub-sector and sector mobility

Sub-sector mobility

- Compared with 2012 there has been a significant increase in the proportion of construction workers that have been working on new housing in Greater London, up from 66% to 73%. This echoes the national trend. For most other types of projects the proportion of construction workers that have worked on them has fallen since 2012; the exception being commercial work, which has remained at a similar level.
- Overall half of all construction workers in Greater London have only worked on one project type (51%), compared with just over a third in 2012 (37%), which again suggests a pattern of increased stability in the sector.



- The number of project types worked on varies significantly by region/nation. Greater London is slightly above average in its likelihood of reporting its construction workers working on one project type (51%). Across regions/nations, the highest proportion is in Wales (63%) and the lowest is in Northern Ireland (34%).

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 Greater London nearly two fifths say they definitely will be (38%); a further two fifths think it is very or quite likely (40%); 6% consider it unlikely; just 3% say they definitely won't be and a further 3% hope to be retired by then, while 11% don't know.



Introduction

Aims and objectives

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

The aim of this survey was to provide a reliable evidence base of the nature of the construction workforce in the UK concerning its qualification levels and the extent of occupational and geographic mobility. The survey findings have the potential to provide a common currency for 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 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.
- Contribute to developing better methodologies for understanding and modelling the labour market impacts of workforce mobility.

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 2015 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research (2012). Overall, 4771 interviews with construction workers in manual roles across the UK were required, split between the 12 standard regions/nations. In total, 452 interviews were conducted in Greater London.



Sampling

This sub-section provides an overview of the sampling methodology employed for the 2015 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 2012 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 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'.

Telephone-based site recruitment

BMG Research's telephone 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 January-December 2014.

Figure 1: Interviews and weights by region/nation

	Interviews	Weighted profile (%)
North East	427	4.2
North West	435	10.3
Yorkshire and the Humber	369	8.2
East Midlands	410	6.6
West Midlands	352	8.0
East of England	366	10.5
Greater London	452	12.8
South East	439	15.1
South West	494	8.7
Scotland	463	8.0
Wales	290	4.7
Northern Ireland	274	2.9
UK	4771	100

*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 2015 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.

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.

Greater London is referred to by the abbreviation 'GL' in tables and abbreviated as 'London' in the charts.

Profile of construction site workers

This first section of the report provides a profile of construction site workers interviewed in the 2015 survey and where relevant makes comparisons with 2012. The section examines:-

- Personal demographics, including age and ethnicity;
- 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 (age and ethnicity) of the 2015 sample of construction workers, compared with the 2012 survey and official statistics from the Annual Population Survey.

The youngest age group (16 to 24 year olds) account for just one in seven construction workers (14%), just as they did in the previous survey in 2012 (15%). Similarly the proportion of workers aged 25 to 34 years is similar to that reported in 2012 (34%, compared with 37%); as is the proportion of workers aged 35 to 55 (41%, compared with 39%) and 55 and over (8%, compared with 7%). Workers aged 60 and over account for just 4% of construction workers.

Compared with the UK workforce overall a higher proportion of construction workers are aged under 35 years (48% in Greater London; 47% of the construction workforce across the UK cf. 37% of economically active adults across the UK).



Figure 2: Age profile of the sample compared with 2012 & the Annual Population Survey

Base: All respondents

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %		UK Workforce* %
16 to 19 years	3	1	5	5	16 to 19 years	4
20 to 24 years	11	14	18	13	20 to 24 years	10
25 to 34 years	34	37	29	29	25 to 34 years	23
35 to 44 years	28	24	24	22	35 to 49 years	34
45 to 54 years	13	15	16	20	50 to 64 years	26
55 to 59 years	4	7	8	6		
60+ years	4			4	65+ years	3
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4771</i>		<i>32,480,800</i>

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

In terms of ethnicity, the vast majority of construction workers in Greater London are of White origins (84%; 86% in 2012). Within this proportion 5% describe themselves as White Irish (cf. 6% in 2012) and a higher proportion than in 2012 describe themselves as 'White Other' (32% cf. 21%).

Workers of Black (8%), Asian (3%) and mixed (1%) ethnic origin (BME) make up similar proportions of the sample as in 2012.

Figure 3: Ethnic profile of the sample compared with 2012 and UK Population

Base: All respondents

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %	UK Population aged 16-64* %
White	84	86	90	94	87
Black	8	8	4	2	3
Asian	3	3	6	1	5
Other/Not stated	4	4	0	3	5
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4771</i>	<i>40,626,700</i>

*Source Annual population Survey via Nomis: UK population aged 16-64 Jan-Dec14

Figure 4 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 the 2012 survey and the population (aged 16-64) of each region/nation as a whole.

Overall 15% of construction workers in Greater London sample are BME, compared with 4% of the UK sample and 36% across the Greater London population.

Compared with other regions/nations, Greater London has a high proportion of construction workers that are of BME origin.



Figure 4: Proportion of construction workers of BME (Non-White) origin

Base: All respondents

	UK BME 2015 %	UK BME 2012 %	UK BME 2007 %	Region/nation's non-white (BME) population aged 16- 64* %
UK (4771)	4	4	3	10
North East (427)	<0.5	<0.5	2	2
North West (435)	1	2	3	8
Yorkshire and the Humber (369)	2	1	10	9
East Midlands (410)	2	2	<0.5	8
West Midlands (352)	5	9	1	14
East of England (366)	3	4	0	9
Greater London (452)	15	12	0	36
South East (439)	8	3	3	7
South West (494)	2	1	2	3
Wales (290)	2	<0.5	1	3
Scotland (463)	2	1	7	2
Northern Ireland (274)	1	<0.5	4	1
<i>Unweighted bases for 2015 survey in parentheses</i>				<i>Total 16-64 population: 32,480,800</i>

*Source Annual population Survey via Nomis: UK Population aged 16-64 by ethnicity Jan-Dec14

Overall half the construction workers in Greater London have lived in the UK all of their life (51%). This proportion is significantly lower than the UK average (84%). The majority of the remainder (29% of all Greater London construction workers) have lived in the UK for more than 5 years.

Amongst all Greater London construction workers 2% indicate that they have a long term illness, health problem or disability which limits the type of work they can do. The most common illness/disability amongst these workers is to do with reduced physical capacity, such as the inability to lift, carry or otherwise move everyday objects, debilitating pain and lack of strength, breath, energy or stamina, asthma, angina or diabetes (22%). Across the UK, 3% of construction workers indicate they have a long term illness, health problem or disability and the most common condition is also reduced physical capacity but stated to a greater extent (39%).

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 5 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from the 2012 survey.



As in the 2012 survey, labourers/general operatives, carpenter/joiners and electricians are among the top three occupations amongst construction workers in Greater London. However, these three occupations do not dominate to the extent that they do across the UK, or as they did in previous years in the region. There has been a decline in the proportions within each of these occupations (from 22%, 15% and 11% respectively in 2012). Bricklayers account for just 1 in 20 construction workers in Greater London (5%), compared with 1 in 7 across the UK (15%). Otherwise, the occupational profile in Greater London is similar to that of the UK as a whole.

Figure 5: Occupational profile

Base: All respondents

	GL 2015	GL 2012	GL 2007	UK 2015
	%	%	%	%
Labourer/General operative	17	22	17	18
Carpenter/joiner	8	15	14	11
Electrician	8	11	9	5
Site manager	6	n/a	n/a	8
Dryliner	6	4	With plasterer	3
Bricklayer	5	4	10	15
Plant/machine operative (e.g. Fork lift/JCB)	5	6	5	7
Plumber	5	7	7	5
Roofer	5	2	6	2
Painter/decorator	5	3	1	3
Technical e.g. surveyor, maintenance technician	5	6	0	2
Scaffolder	4	1	8	4
Banksman/banksperson	3	4	2	2
Pipe fitter	3	4	3	1
Ground worker	2			4
Glazer/window fitter	2	1	n/a	1
Steel erector	2	4	5	1
Supervisor/foreman	1	3	1	1
Ceiling fixer	1	1	With plasterer	1
Tiler	1	n/a	n/a	
Project manager	1	n/a	n/a	
Concrete worker	1	n/a	n/a	
Plasterer	<0.5	1	4	2
Floorer	<0.5	1	2	1
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4771</i>



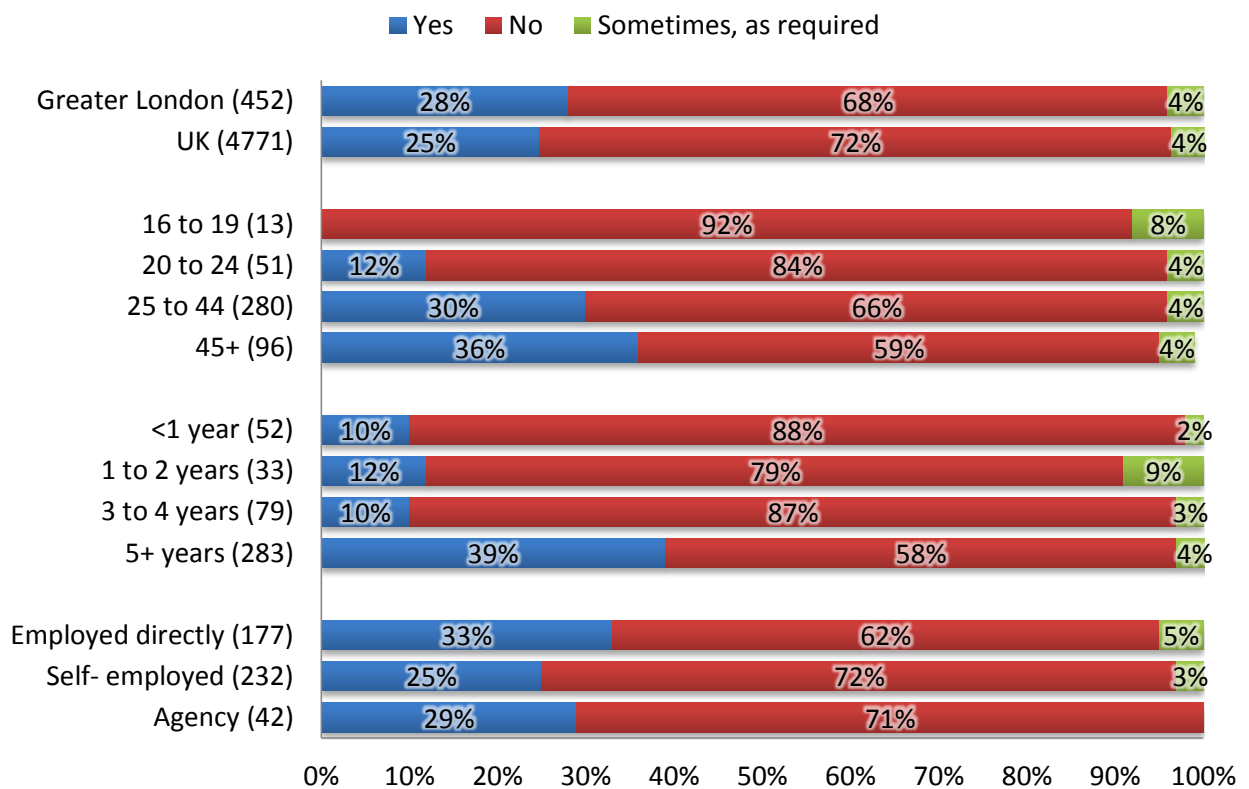
Supervisory roles

More than a quarter of all construction workers in Greater London interviewed for the 2015 survey say they perform a supervisory or management role on their site (28%). This is a higher proportion than nationally (25%).

The incidence of workers in a supervisory role is considerably 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 (33%) are more likely than those that are self-employed (25%) or work for an agency (29%) to perform a supervisory or management role. These differences are summarised in the following figure.

Figure 6: Whether respondents perform a supervisory or management role

Base: All respondents



Unweighted bases in parentheses

Employment status

Around two fifths of construction workers in this year's Greater London sample are directly employed by a company (39%) and this is a similar proportion to 2012 (38%), but significantly lower than the 2015 UK average (54%).

The highest proportion of construction workers within Greater London is self-employed (51%) and this is unchanged since 2012, while being significantly higher than the UK average (39%).



Contrary to what is observed nationally and within other regions/nations, the proportion of workers who are directly-employed increases amongst respondents who have been working in the construction sector for longer (44% amongst those with 5+ years' experience, compared with 30% amongst those who have worked in the industry for less than 5 years). Elsewhere, longer established construction workers are more likely than those that have worked in construction for less than 5 years to be self-employed. Within Greater London the opposite is true, with 49% of those that have worked in construction for 5 or more years reporting they are self-employed, compared with 55% of those that have worked in the sector for less than 5 years.

Just 9% of the sample is accounted for by construction workers who are working for an employment agency and this proportion is highest amongst those new to the industry within Greater London. Around 1 in 5 construction workers that have worked in the industry for less than a year work for an employment agency (19%), compared with just 6% of those that have worked in the industry for 5 or more years. This is summarised in the following table.

Figure 7: Employment status

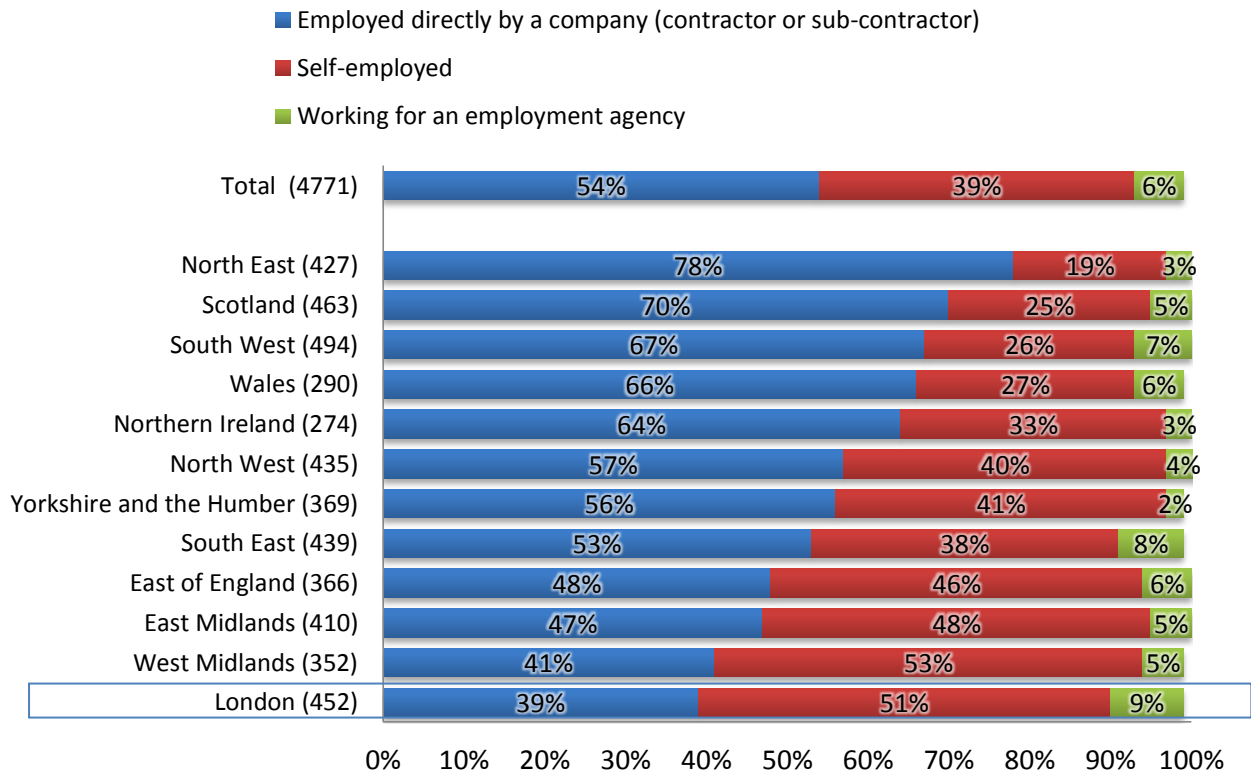
Base: All respondents

	GL 2015 %	GL 2012 %	UK 2015 %	Years working in construction			
				<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	39	38	54	23	39	30	44
Self-employed	51	51	39	58	42	58	49
Working for an employment agency	9	11	6	19	15	11	6
Working on some other basis	<0.5	0	<0.5	0	3	0	0
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>4771</i>	<i>52</i>	<i>33</i>	<i>79</i>	<i>283</i>

As mentioned, the proportion employed directly is lower in Greater London than the UK average (39%, compared with 51%), while the proportion that are self-employed is higher (51%, compared with 39%). Compared with other regions/nations, Greater London, alongside the West Midlands, has an employment status profile that deviates most significantly from the UK average.



Figure 8: Employment status by region/nation
 Base: All respondents



Unweighted bases in parentheses

Employment contract basis

Overall, more than a third of Greater London construction workers (36%) are employed on a temporary, rather than permanent basis (62%). The remainder believed they had another type of contract arrangement (2%), refused (<0.5%), or did not know (<0.5%).

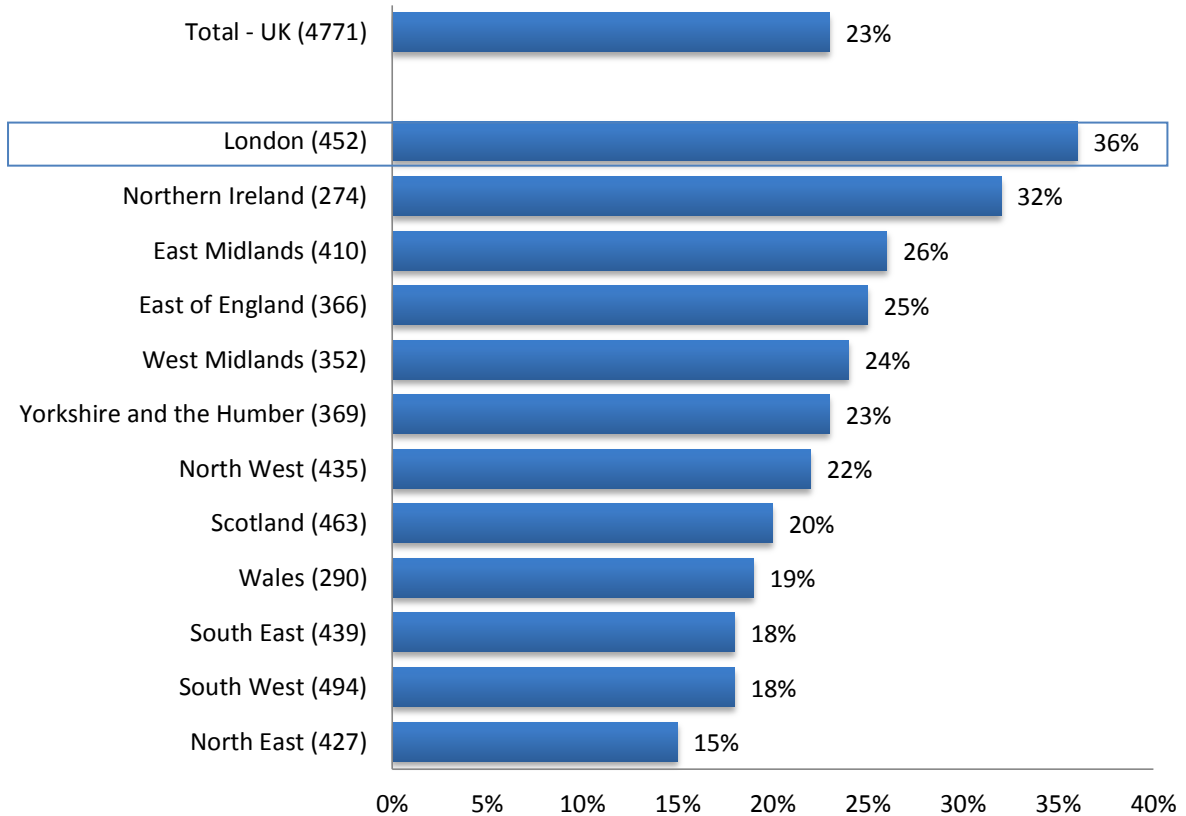
Amongst workers who are employed by an agency the proportion on temporary contracts is significantly higher, as one would expect (79%), than it is amongst those who are self-employed (42%) or employed directly (17%).

Across regions/nations, Greater London has the highest proportion of temporary workers, as the following figure illustrates. The proportion is significantly higher than the UK average (23%) and twice that of some other regions/nations, including the North East, South West and South East.



Figure 9: Proportion of workers employed on a temporary basis (including fixed-term contracts)

Base: All respondents



Unweighted bases in parentheses

By current trade/role, the proportion working on a temporary basis is higher than average amongst labourers/general operatives (60%) and plant and machine operatives (60%) and lowest amongst scaffolders (15%), site managers (23%) and electricians (24%).

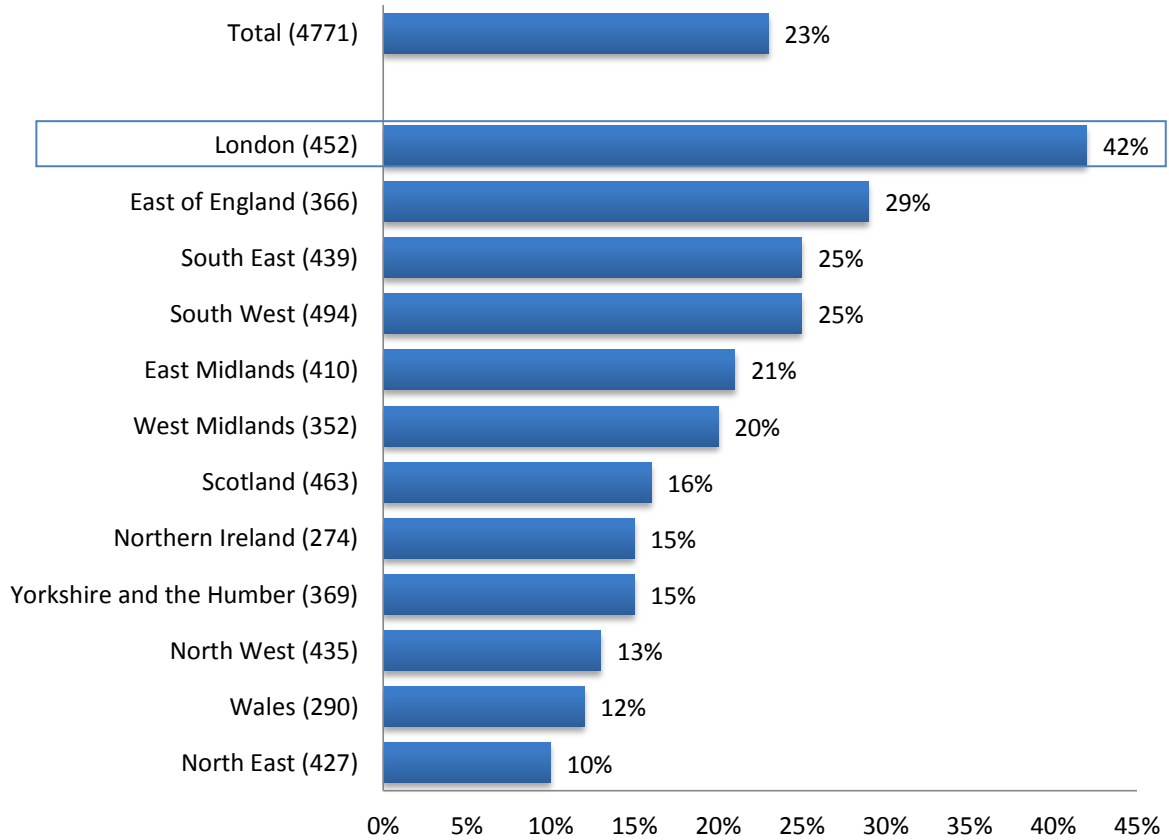
Hours worked

On average construction workers in Greater London report that they typically work 46 hours per week, with 46% that tend to work between 40 and 49 hours per week and 42% that work more than 50 hours.

The proportion that works more than 50 hours per week is significantly higher than the UK average amongst Greater London construction workers and is higher than elsewhere in the UK.



Figure 10: Proportion of workers that typically work 50 or more hours per week
 Base: All respondents Unweighted bases in parentheses



Unweighted bases in parentheses

Work histories

Time in the sector

Nearly 1 in 5 Greater London construction workers have worked in the construction industry for over 20 years (19%) and more than 2 in 5 have worked in the industry for at least 10 years (43%).

Construction workers in Greater London are less likely than the UK average to have worked in industry for over 20 years (19% compares to 31% across the UK).

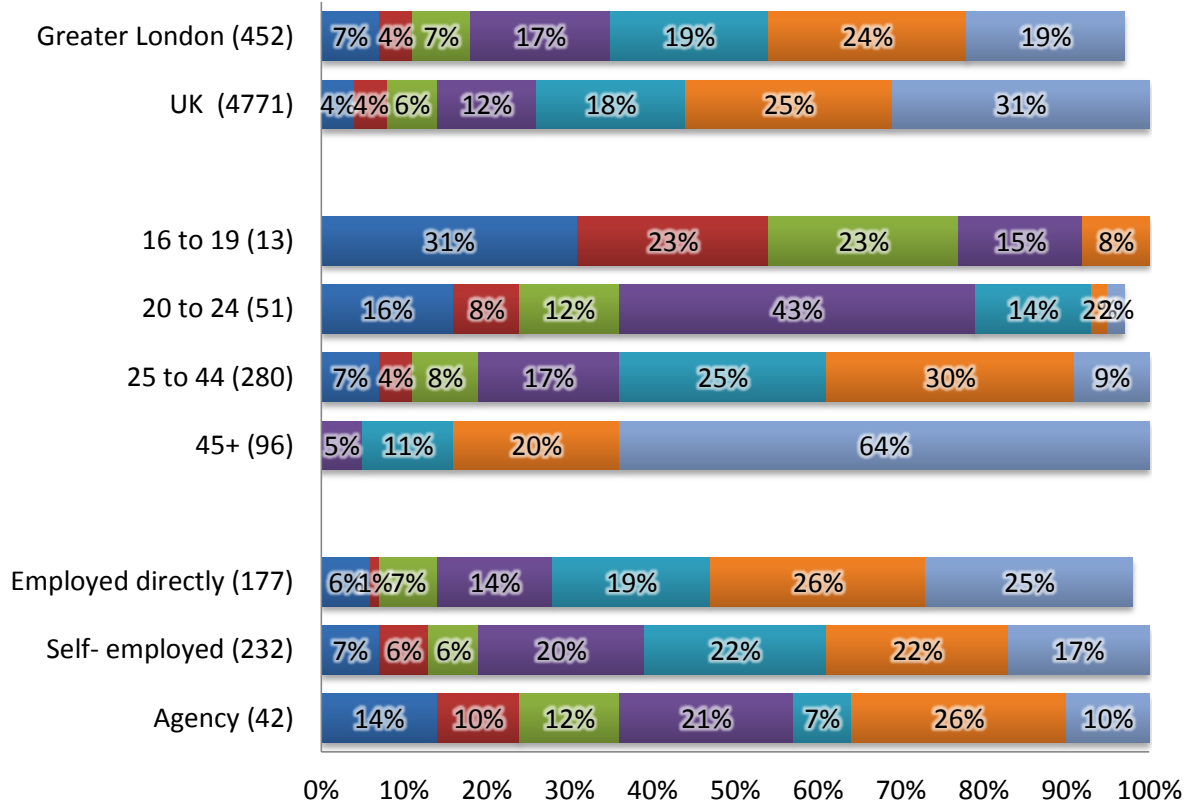
As one would expect the length of experience in the industry increases with age to nearly two thirds of workers aged 45 and over in Greater London that have more than 20 years experience of working in the construction sector (64%).



Figure 11: Years spent working in the construction sector

Base: All respondents Unweighted bases in parentheses

- < 6 months
- 6 months to a year
- 1-2 years
- 2-5 years
- 5-10 years
- 10-20 years
- 20+ years



Unweighted bases in parentheses

Compared with 2012 Figure 12 shows that there has been an increase in new workers in 2015, with 18% having up to 2 years experience in 2015, compared with 10% in 2012. Within Greater London there has been little change in the proportion that has been working in the sector for more than 20 years (19% in 2015; 20% in 2012).



Figure 12: Years spent working in the construction sector (cumulative)

Base: All respondents

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %
Less than 6 months	7	1	2	4
Up to a year	11	3	10	8
Up to 2 years	18	10	16	14
Up to 5 years	35	29	34	26
Up to 10 years	54	57	54	44
Up to 20 years	78	78	74	69
More than 20 years	19	20	26	31
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4771</i>

Pre-construction employment histories

Two thirds of workers in Greater London have only ever worked in the construction industry (67% cf. 70% across the UK and 76% within Greater London in 2012). This includes more than half who have worked in construction pretty much continuously (53%); 8% for whom this is their first job; and a further 6% that have only ever worked in the construction sector, but have had spells out of work.

Within Greater London, there is little difference in the propensity to have worked continuously in construction by age, although workers aged 25 and over are more likely than younger workers to be in their first job in construction after working in another industry (24% of those aged 25 and over, compared with 10% of younger workers). As one would expect, younger workers are more likely to say that this is their first job and that they have not worked in any other industry (23% of 16 to 19 year olds), whilst also being more likely to say they have only ever worked in construction jobs but have had spells of being out of work (23%).



Figure 13: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.

All respondents

	GL 2015 %	UK 2015 %	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)	53	55	23	55	52	55
I have only worked in construction jobs but have had spells of being out of work	6	6	23	8	5	6
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	7	8	0	10	8	5
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	21	19	8	12	24	23
This is my first job. I haven't worked in any other industry.	8	9	23	12	6	7
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	4	3	15	4	4	3
Prefer not to say	2	2	8	0	2	0
<i>Unweighted bases</i>	<i>452</i>	<i>4771</i>	<i>29</i>	<i>52</i>	<i>205</i>	<i>147</i>

Overall 1 in 5 construction workers in Greater 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 (21%). This compares with 1 in 6 construction workers in 2012 (18%).

Those who had worked in other sectors before starting their construction careers (25% of all respondents) were asked to give details of what they were doing immediately before they started working in construction. In more than a quarter of cases respondents had previously worked in the wholesale/retail sector (27%) while 1 in 7 had worked in manufacturing beforehand (14%). One in nine construction workers who worked in another sector before working in construction previously worked in administrative and support service activities (11%).



Figure 14: Industry worked in before starting work in the construction sector

Base: Where first job was not in construction

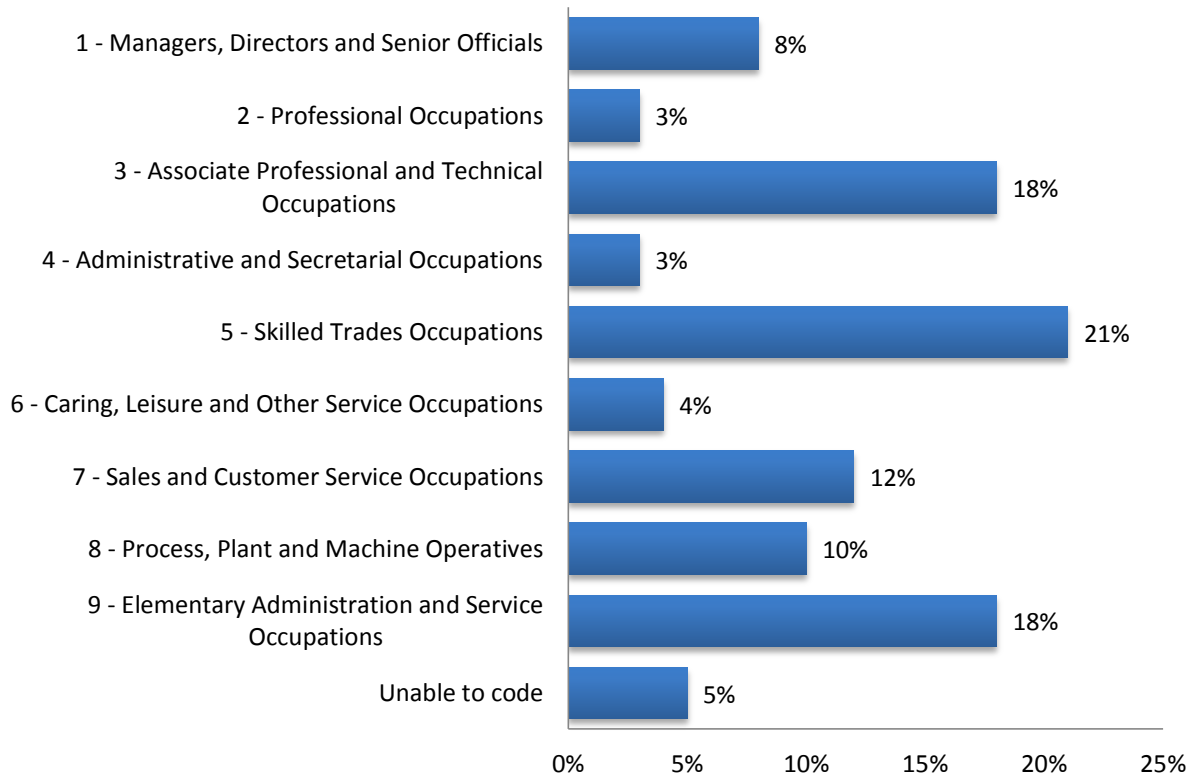
	GL 2015 %	UK 2015 %
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	27	22
C - Manufacturing	14	20
N - Administrative and support service activities	11	6
H - Transportation and storage	7	10
R - Arts, entertainment and recreation	7	4
O - Public administration and defence; compulsory social security	6	6
I - Accommodation and food service activities	5	10
A - Agriculture, Forestry and Fishing	4	6
J – Information and communication	4	2
L – Real estate activities	1	<0.5
P - Education	1	1
K – Financial and insurance activities	1	1
<i>Unweighted bases</i>	<i>113</i>	<i>983</i>

In terms of the job roles that Greater London respondents have undertaken in other sectors, the highest proportion has worked in skilled trades occupations (21% cf. 31% in 2012 and 29% across the UK in 2015). One in six has worked in associate professional and technical occupations (18% cf. 12% in 2012 and 12% across the UK in 2015) and the same proportion has worked in elementary administration and service occupations (18% cf. 39% in 2012 and 21% across the UK in 2015).

One in eight worked in sales and customer service occupations (12%; 12% in 2012; 9% across the UK in 2015), whilst 1 in 10 that worked in other sectors have worked as process, plant and machine operatives (10%; 11% in 2012; 13% across the UK in 2015) and 1 in 12 as managers directors and senior officials (8%; 8% 2012; 5% across the UK in 2015).



Figure 15: Job roles undertaken in other sectors
 Base: Where first job was not in construction



Unweighted base = 113

Occupational switching and progression within construction

As in the 2012 survey, as well as asking workers about their current role, all workers were also asked whether they have worked in other roles/occupations whilst working in the construction industry.

Overall more than a third of all construction workers in Greater London have worked in more than one construction trade or occupation whilst working in the construction industry (36%). This represents a significant increase compared with 2012 when 1 in 6 had worked in more than one role (18%). The proportion in Greater London is similar to the UK average (34%).

Workers with a supervisory or management role on site are more likely than those without to have worked in more than one construction trade or occupation (42%, compared with 34%).

As in 2012, there are also variations by current job role, with plant/machine operatives (75%), followed by site managers (57%), and banksmen/bankspersons* (57%) most likely to have had more than one role/occupation within construction. Electricians and roofers are least likely to have had any other trade within the construction sector (each 18%). The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector. (*Caution: Small sample base.)



Figure 16: 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 2015 %	UK 2015 %		GL 2015 %	UK 2015 %
Plant / Mach. Op. (20)	75	55	Carpenter / Joiner (32)	28	18
Site manager (30)	57	69	Plumber (23)	22	13
Banksman/banksperson (14)*	57	46	Bricklayer (24)	21	19
Scaffolder (20)	40	31	Roofer (22)	18	29
			Electrician (38)	18	13

Unweighted bases for 2015 Greater London in parentheses

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 17 summarises the previous trades/occupations most frequently listed by those who have worked in other roles in the construction sector.

Workers are most likely to have previously worked as a labourer/general operative (33%) while 1 in 5 workers has previously worked as a carpenter/joiner (20%), 1 in 6 as a painter/decorator (16%), 1 in 8 as a roofer (12%), 1 in 9 as a bricklayer (11%) and 1 in 10 as a plasterer.



Figure 17: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	GL 2015	UK 2015
	%	%
Labourer/General operative	33	30
Carpenter/joiner	20	18
Painter/decorator	16	8
Roofer	12	9
Bricklayer	11	13
Plasterer	10	7
Dryliner	8	7
Ceiling fixer	8	4
Plumber	7	5
Banksman/banksperson	6	7
Site manager	6	5
Floorer	6	3
Plant/machine operative (e.g. Fork lift/JCB)	4	10
Technical e.g. surveyor, maintenance technician	4	4
Electrician	4	3
Pipe fitter	3	5
Glazer/window fitter	3	1
Scaffolder	3	4
Ground worker	2	5
Steel erector/rigger	2	3
Welder	2	2
Mechanical fitter	1	1
Tiler	1	1
Concrete worker	1	1
Gardener/landscaper	0	1
Other	7	6
<i>Unweighted bases</i>	<i>163</i>	<i>1576</i>

Future career plans

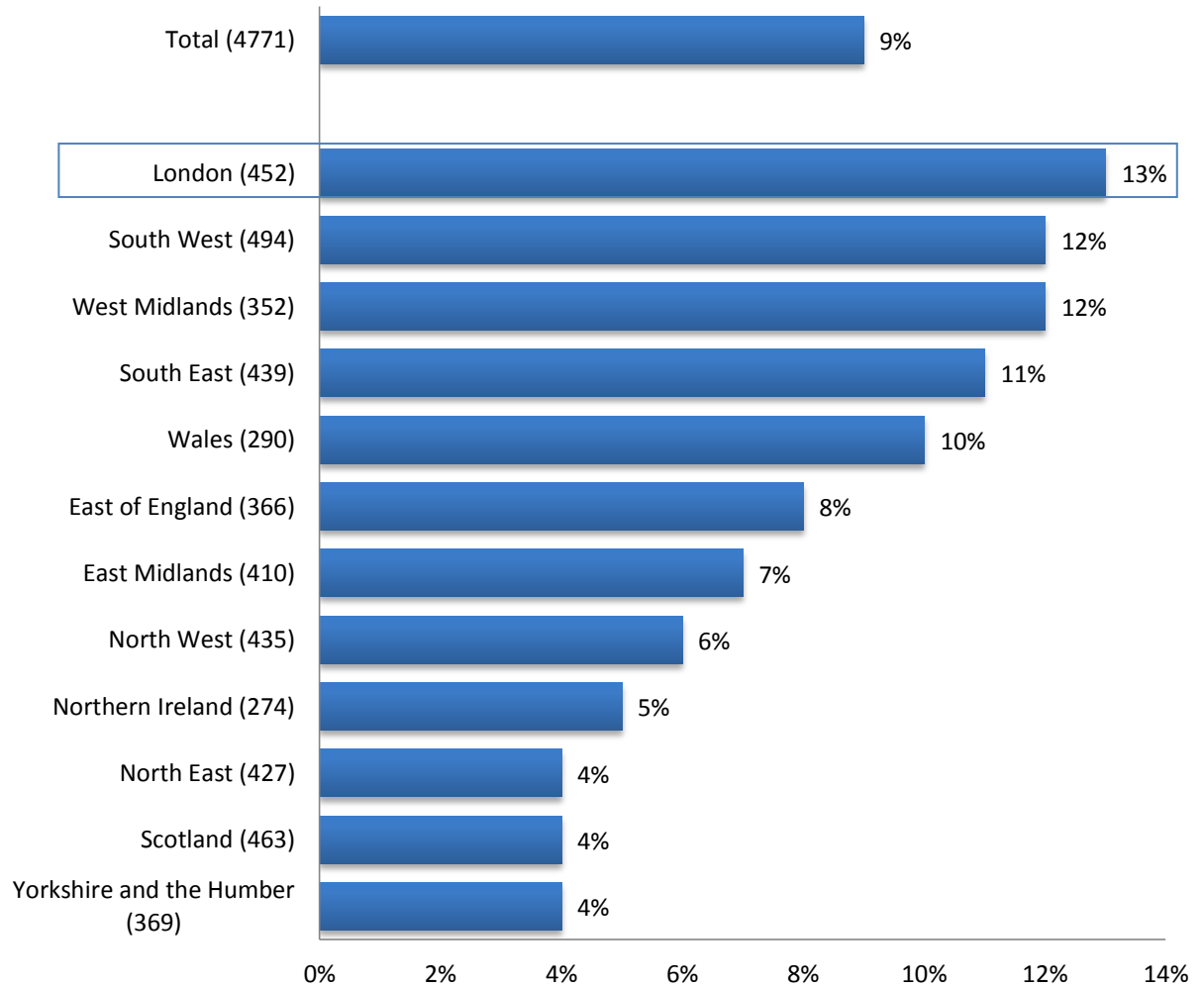
Thinking about their future plans in construction, nearly three quarters of construction workers in Greater London would like to carry on in the same trade or occupation (73%); 1 in 8 would like to change their trade/occupation (13%); and a further 1 in 20 would like to leave construction (6%); the remainder (9%) are not sure.

Compared with the UK average, Greater London construction workers are less likely to want to carry on as they are (79% across the UK) and more likely to want to change their trade/occupation (9% across the UK).



Figure 18: Proportion of construction workers that would like to change their trade or occupation, by region/nation

Base: All respondents



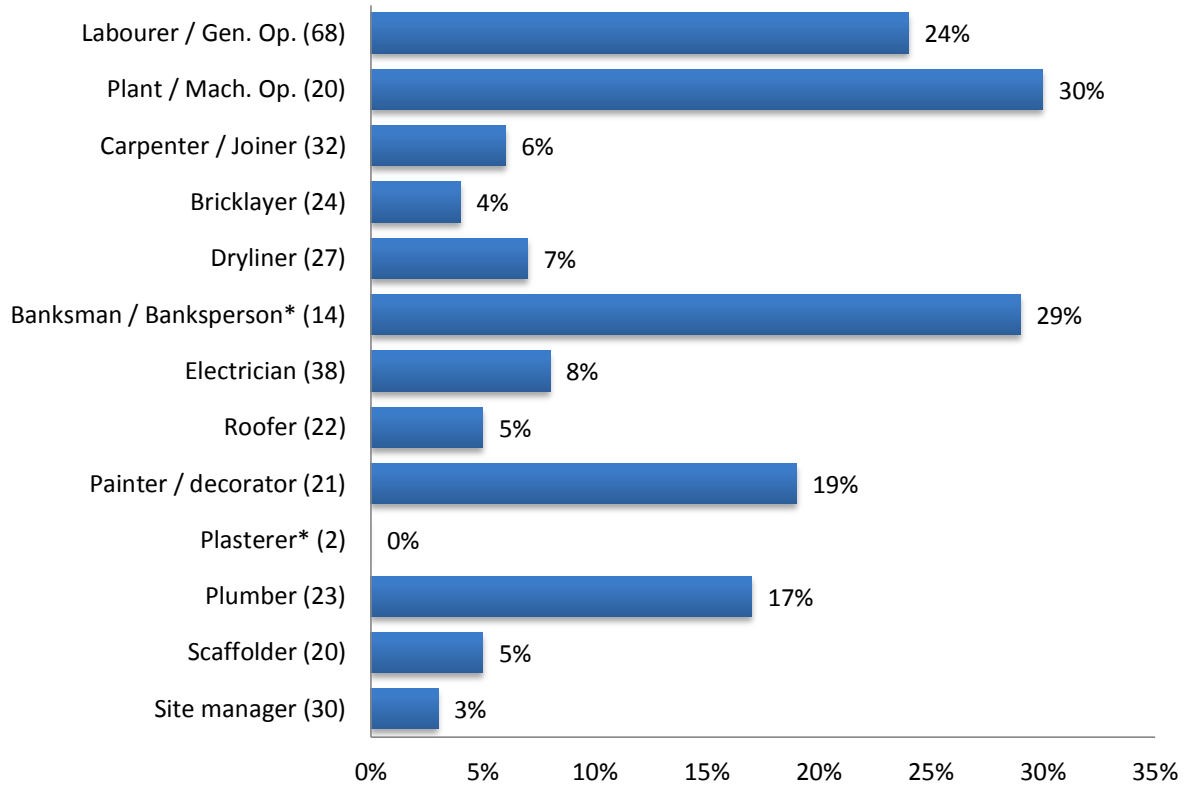
Unweighted bases in parentheses

Construction workers currently working for an agency (36%) are more likely than those employed directly (10%) or self-employed (13%) to want to change their trade or occupation; whilst by current trade/occupation those working as plant/machine operatives (30%) are most likely to, as the following chart illustrates.



Figure 19: Proportion of construction workers that would like to change their trade or occupation, by current trade/occupation

Base: All respondents *caution: small sample base



Unweighted bases in parentheses

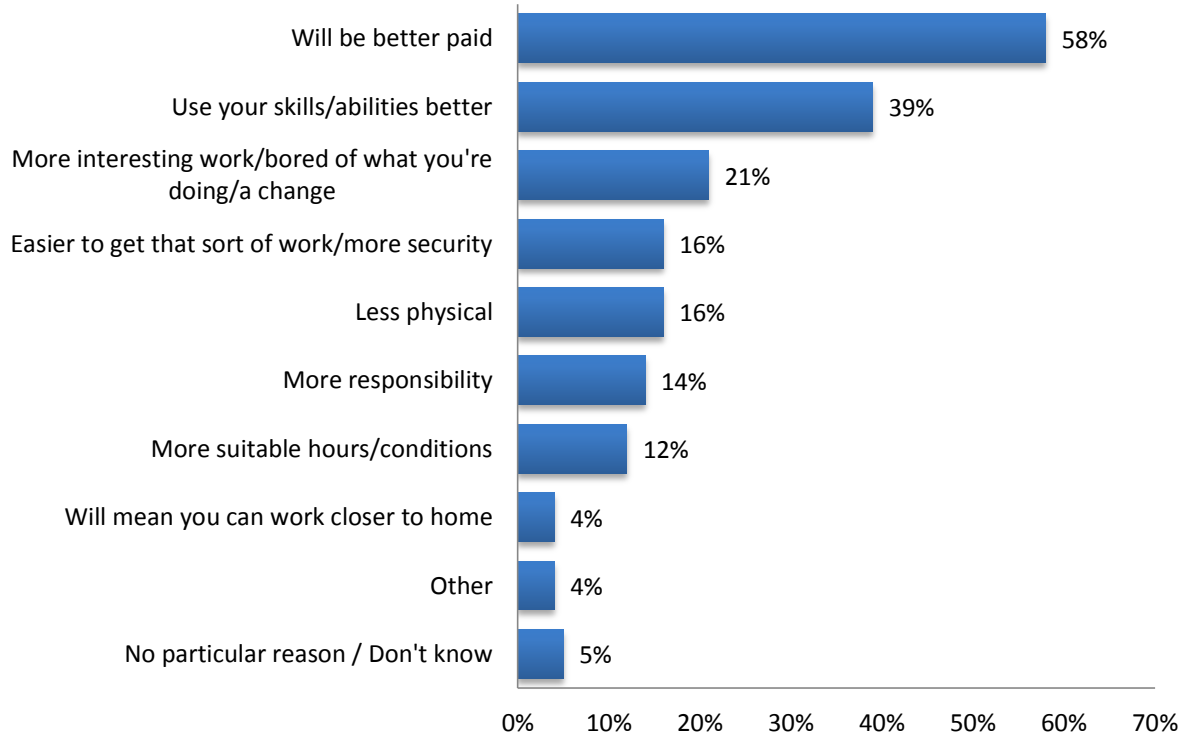
Amongst those who would like to change trade or occupation a wide range of alternative trades/occupations are mentioned, however the highest proportion overall would like to be a site manager (25%).

In more than four fifths of all cases where construction workers in Greater London would like to change trade or occupation they believe they will require further training or qualifications in order to do this other kind of work (88%). This proportion is higher than that reported across the UK (77%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (58%), while two fifths of those wishing to change trade would like to use their skills/abilities better (39%). A fifth believe they would have interesting work or that they are bored with what they are currently doing (21%), while slightly fewer believe that a different trade or occupation would be easier to get that sort of work or that it would offer more security (16%) or that it would be less physical (16%).



Figure 20: Reasons for wanting to change trade/occupation
 Base: Where workers would like to change trade/occupation



Unweighted base = 57

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 Greater London say they do not hold any card and less than 0.5% are unsure. 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 21 summarises the proportion of workers by region/nation that hold any card and compares these proportions with the 2012 survey. Workers in Greater London are amongst those that are most likely to hold skill certificates or cards. There has been a very slight increase in this respect in Greater London since 2012 and the increase in the proportion of workers in Greater London, as across all regions/nations, that have a skill card/certificate since 2007 is significant.

Figure 21: Proportion of workers that have a skill card/certificate, by region/nation

Base: All respondents

	UK 2015 %	UK 2012 %	UK 2007 %
UK (4771)	96	97	68
Greater London (452)	98	96	72
South East (439)	98	96	71
West Midlands (352)	98	100	79
North West (435)	97	98	75
Yorkshire and the Humber (369)	97	97	66
East of England (366)	96	98	81
North East (427)	96	99	68
South West (494)	96	97	70
East Midlands (410)	93	99	60
Wales (290)	92	92	82
Northern Ireland (274)	90	100	84
Scotland (463)	88	98	59
<i>Unweighted bases for 2015 Greater London in parentheses</i>			

As in 2012, the incidence of workers holding skill cards or certificates remains lower amongst those who have worked within construction for a shorter period of time (92% 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).

However, more positively, as Figure 22 summarises, in terms of those with less experience of the industry, in 2015, a higher proportion of those with less than 1 year of experience hold a skill card or certificate than in 2012.



Figure 22: Proportion of workers that have a skill card/certificate, by other variables
Base: All respondents

		GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %
Total (452)		98	96	72	96
Age	16 to 19 years (13)	100	0	63	85
	20 to 24 years (51)	96	88	64	95
	25 to 44 years (280)	98	97	72	97
	45+ years (96)	96	99	79	95
Length of time in construction	<1 year in construction (52)	92	0	40	88
	1 to 2 years (33)	100	68	55	96
	3 to 4 years (79)	99	91	66	96
	5+ years (283)	98	99	78	96
Contract-type	Employed directly (177)	97	99	72	95
	Self-employed (232)	99	99	71	97
	Agency (42)	93	68	78	95
<i>Unweighted bases for 2015 Greater London in parentheses</i>					

In terms of the type of skill card or certificate held by construction workers in Greater London the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (89%), as it was in 2012 (91%). Overall 7% hold the CPCS (Construction Plant Competence Scheme) card/certificate and this proportion increases to 14% amongst agency workers.

Figure 23: Type of skill card/certificate held
Base: All respondents

	GL 2015 %	GL 2012 %	UK 2015 %
CSCS (Construction Skills Certification Scheme) (GB)	89	91	86
CSR (Construction Skills Register) (NI)	1		3
CISRS (Construction Industry Scaffolders Record Scheme)	4	2	4
CPCS (Construction Plant Competence Scheme)	7	11	13
Other	6	8	4
<i>Unweighted bases</i>	452	410	4771

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

- All dryliners, roofers, painters/decorators hold CSCS (Construction Skills Certification Scheme (GB)), while labourers/general operatives (94%), site managers (93%), bricklayers (92%) and plumbers (91%) are more likely to hold this card;
- Seven in ten scaffolders* (70%) hold CISRS (Construction Industry Scaffolders Record Scheme);



- Seven in ten plant and machine operatives* (70%) and a third of banksman/banksperson* (36%) hold CPCS (Construction Plant Competence Scheme);
- More than a quarter of electricians hold other types of skill cards/certificates (29%).

(*Caution: Small sample base.)

Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 24 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Overall, within Greater London, 4% of CSCS card holders have red cards; half the CSCS card holders (49%) have green cards; and nearly a quarter of CSCS card holders (22%) and two of the three CSR card holders in Greater London have blue cards. One in eight CSCS card holders has gold cards (12%).

Figure 24: Colour of CSCS/CSR cards held

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

	CSCS %		CSR* %
Red - Trainee	3	Red - Apprenticeship/Trainee	1
Red - Experienced worker card	1	Red - Trained Plant Operator	0
Green - construction site operative card for general site workers	49	Green - Construction Operative (for general site workers)	0
Blue - skilled	22	Blue - Operative/ Craft	1
		Blue - Plant Operator	1
		Blue - Basic Scaffolder	0
Gold - craft/supervisor card	12	Gold - Craft/Supervisor Card	0
		Gold - Advanced Scaffolder	0
Platinum - manager card	1	Platinum - Manager Card	0
Black - contracts manager card	5	Black - Senior Managers Card	0
Other	4	Other Professional cards, visitor cards, temporary cards	0
Unsure	2	Unsure	0
<i>Unweighted bases</i>	<i>404</i>		<i>3</i>

As expected, younger workers are more likely to hold Red Trainee cards (27% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue or Black cards (25% and 17% of 45+ year olds). Workers currently employed by an agency are more likely to hold Green cards (72%), compared with those employed directly or self-employed (37% and 54% respectively).

Card colours also vary significantly according to current occupation/trade, as Figure 25 summarises. Some differences (not all significant due to sample sizes) include that labourers/general operatives (77%) and roofers (64%) are most likely to hold Green cards; scaffolders* (44%) and banksman/bankspersons* (36%) are most likely to hold Blue cards;



electricians (41%) and plumbers (33%) are most likely to hold Gold skill cards and site managers are most likely to hold black cards (43%). (*caution: low sample bases.)

Figure 25: Colour of CSCS card held, by current occupation

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

	Unweighted bases	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold %	Platinum %	Black %
Labourer / Gen. Op.	64	0	5	77	14	3	0	0
Plant / Mach. Op.*	16	0	6	56	31	0	0	0
Carpenter / Joiner	28	0	0	39	32	21	0	0
Bricklayer	22	0	5	45	27	14	0	0
Dryliner	27	4	4	52	33	7	0	0
Banksman / Banksperson*	11	9	0	45	36	9	0	0
Electrician	27	11	0	37	0	41	0	0
Roofer	22	0	0	64	32	5	0	0
Painter / decorator*	21	0	0	43	43	5	0	10
Plumber	21	5	0	43	19	33	0	0
Scaffolder *	9	22	0	33	44	0	0	0
Site manager	28	4	0	18	7	11	4	43

Construction qualifications held

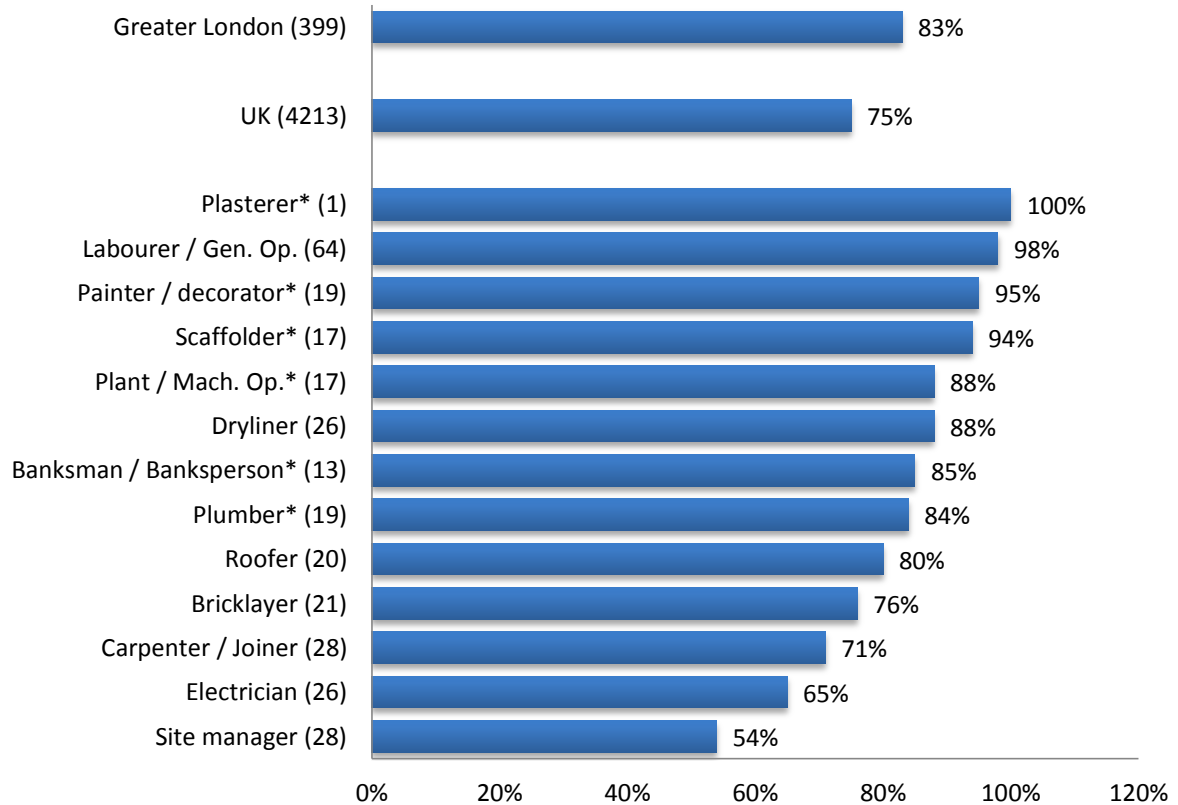
All workers were asked about the construction-specific qualifications they held after leaving full time education and started their first proper job in construction.

Overall more than four fifths of all construction workers in Greater London say they had no formal qualifications related to construction when they first started working in the construction industry (83%). This proportion is higher than the UK average (75%). By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst plasterers* (100%), labourers/general operatives (98%), painters/decorators* (95%) and scaffolders* (94%) whilst site managers (54%) and electricians (65%) are least likely to have started with no formal qualifications. (*Caution: Small sample base.)



Figure 26: 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 who provided a valid response *caution: small sample base



Unweighted bases in parentheses

After being asked about the qualifications they had when they first started their career all workers were also then 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, just over half of Greater London construction workers reported holding some sort of construction related qualification at the time of interview (52%), compared with a higher proportion in 2012 (60%). Compared with the UK average, Greater London construction workers are less likely to hold some sort of construction related qualification (63% across the UK).

As Figure 27 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 (33%) and workers employed by an agency (37%).



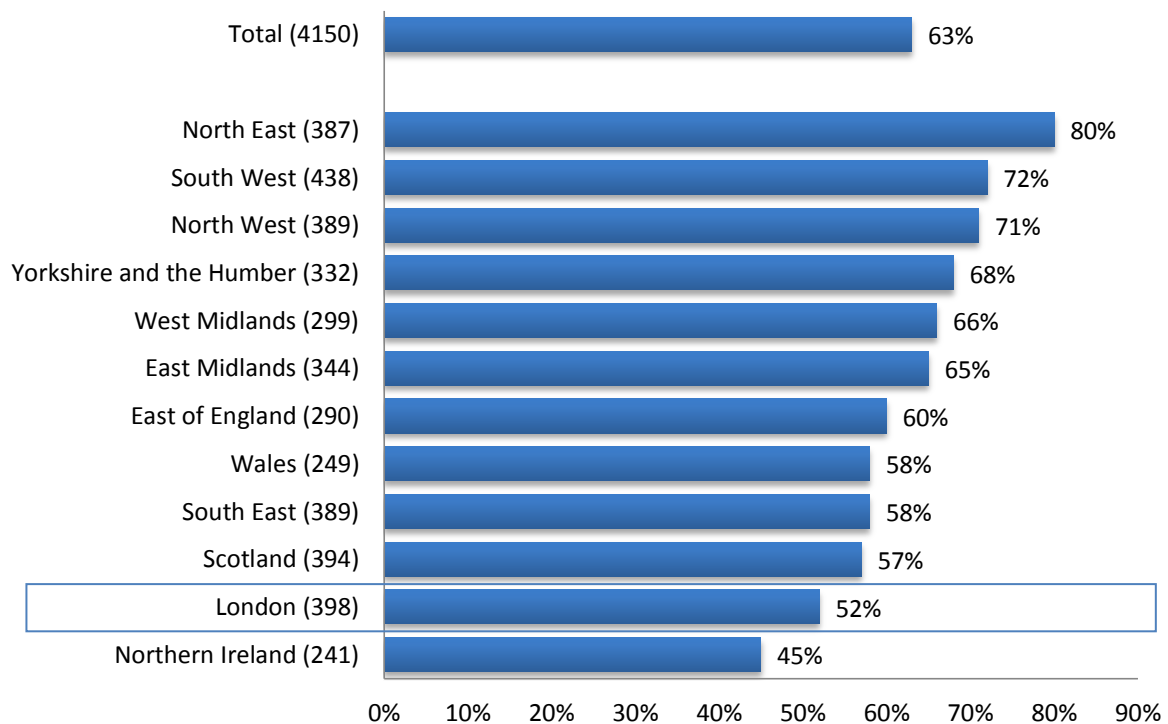
Figure 27: Proportion of workers that hold any construction-specific qualification
Base: All respondents who provided a valid response

		GL 2015	GL 2012	GL 2007	UK 2015
		%	%	%	%
Total (398)		52	60	36	63
Age	16 to 19 years (12)	58	0	21	62
	20 to 24 years (50)	56	44	21	62
	25 to 44 years (245)	52	63	38	65
	45+ years (79)	56	62	46	61
Length of time in construction	<1 year (51)	33	0	6	35
	1 to 2 years (31)	45	28	15	50
	3 to 4 years (68)	28	53	13	54
	5+ years (244)	64	67	47	68
Current contract type	Employed directly (153)	59	67	39	65
	Self-employed (207)	50	63	35	61
	Agency (38)	37	23	28	46

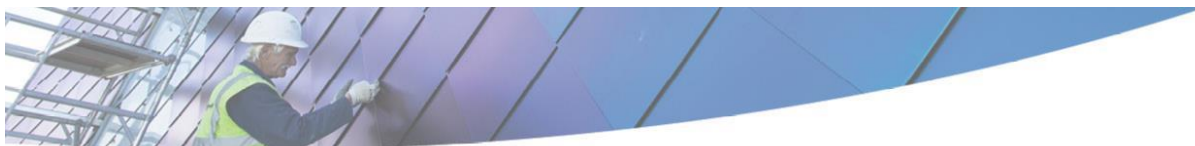
Unweighted bases for 2015 Greater London in parentheses

Greater London is the region in England with the lowest proportion in terms of the propensity of its construction workforce to hold any construction-specific qualifications (see Figure 28), while across the UK, only Northern Ireland is showing a lower proportion.

Figure 28: Proportion of workers that hold any construction-specific qualification, by region/nation
Base: All respondents who provided a valid response



Unweighted bases in parentheses



The likelihood that workers hold any qualifications also varies significantly by current job role, as was the case in 2012. Electricians (82%), scaffolders (82%), plumbers (80%) and site managers (74%) are most likely to hold qualifications. Trades less likely to hold formal qualifications include those working as labourers/general operatives (24%) and painters/decorators (33%).

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 29 summarises the types of qualifications that workers hold and compares the figures to the 2012 survey (amongst those who have any qualifications).

As in 2012 the qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (68%), which is a slightly lower proportion than that reported in 2012 in Greater London (72% in 2012) and higher than the UK 2015 average (66%). One in six Greater London construction workers with qualifications hold City & Guilds qualifications (18%), a higher proportion than in 2012 (10%), but similar to the UK 2015 average (20%). In Greater London 1 in 20 construction workers with qualifications now holds an apprenticeship (6%), which is a significant increase compared with 2012 when none did but is lower than the UK average in 2015 (13%).

Figure 29: Main type of qualification held

Base: Workers with qualifications who provided a valid response

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %
NVQ/SVQ	68	72	57	66
City & Guilds	18	10	30	20
Apprenticeship	6	0	6	13
HNC/HND/BTEC Higher	3	2	1	4
Degree	10	4	0	4
Other	12	4	n/a	11
<i>Unweighted bases</i>	<i>182</i>	<i>163</i>	<i>119</i>	<i>2455</i>

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. As in 2012, 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 4 construction workers in Greater London believe they would benefit from some form of training in basic skills (26%), compared with the same proportion in 2012. In terms of the type of training required there is an almost even split across reading, writing and maths (9%, 9% and 6%) but higher with regard to speaking English (16%). This is summarised in Figure 30.

Figure 30: Self-assessed need for training in basic skills

Base: All respondents

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %
ANY	26	26	24	14
Reading	9	11	14	6
Writing	9	11	12	6
Speaking English	16	14	15	7
Maths	6	10	8	6
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4771</i>

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

- The self-employed (35% cf. 18% of those directly employed and 12% of agency workers);
- Dryliners (56%), painters/decorators (52%) and plant/machine operatives (35%).

The proportion that identified a need for more training in basic skills is higher in Greater London than the UK average (14%).

Current study for additional construction qualifications

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

As in 2012 the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (31% of 16 to 19 year olds; 27% of 20 to 24 year olds). A fifth of those working through an agency (21%) and those who have a supervisory or management role on site (20%) are currently studying.

Of those who have no qualifications currently 1 in 9 are working towards one (11%).

Figure 31 summarises these findings.



Figure 31: Proportion working towards additional construction qualifications

Base: All respondents

		GL 2015	GL 2012	GL 2007	UK 2015
		%	%	%	%
Total (452)		14	12	15	12
Age	16 to 19 years (13)	31	0	42	57
	20 to 24 years (51)	27	22	17	23
	25 to 44 years (280)	14	9	13	10
	45+ years (96)	7			4
Length of time in construction	<1 year in construction (52)	17	0	40	31
	1 to 2 years (33)	21	18	9	28
	3 to 4 years (79)	22	15	17	23
	5+ years (283)	11	10	12	7
Contract type	Employed directly (177)	15	N/A	N/A	16
	Self-employed (232)	13	N/A	N/A	8
	Agency (42)	21	N/A	N/A	10
Highest qualification level	None (190)	11	N/A	N/A	11
	Level 1 (9)	11	N/A	N/A	32
	Level 2 (90)	19	N/A	N/A	15
	Level 3 (72)	14	N/A	N/A	8
	Level 4+ (37)	22	N/A	N/A	15

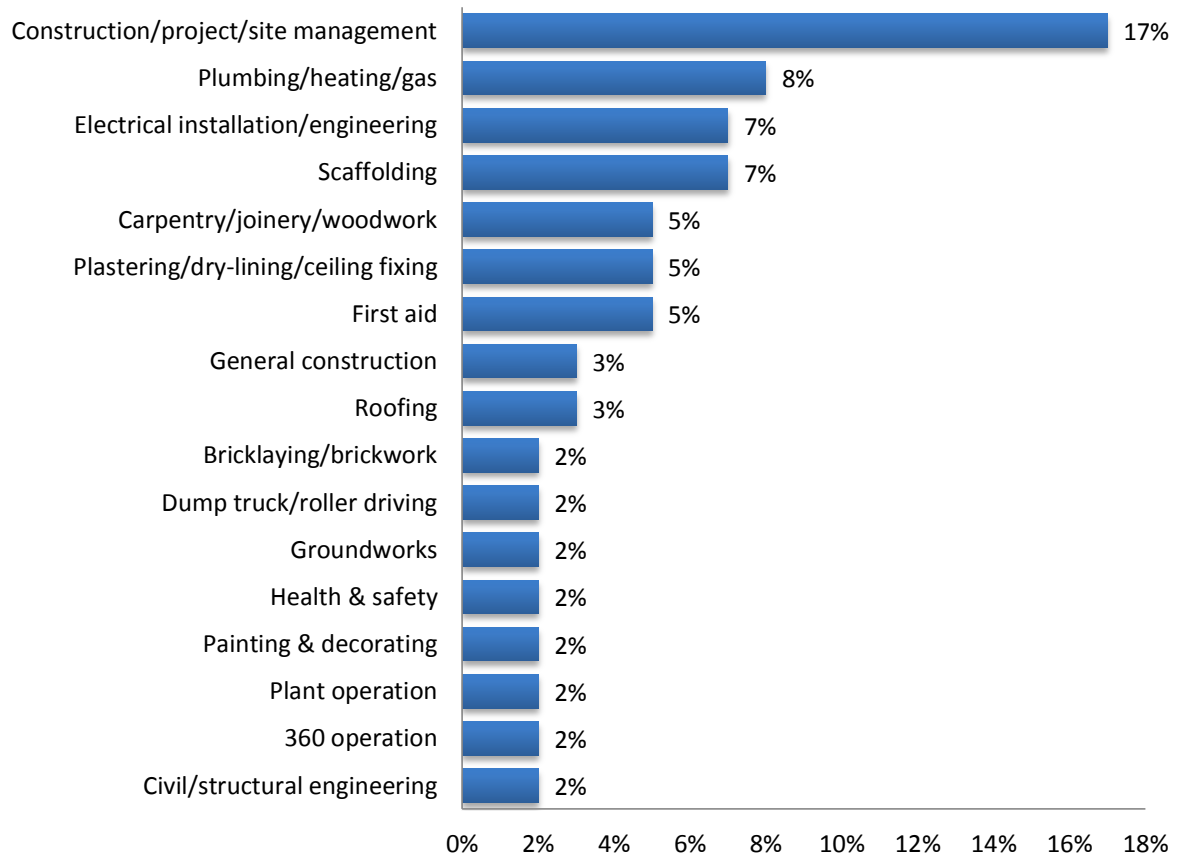
Unweighted bases for 2015 Greater London in parentheses

Of those who are currently studying for a qualification the most popular type of qualification is an NVQ/SVQ (67%). In terms of the subject of the qualifications being worked towards construction/project/site management (17%), followed by plumbing/heating/gas (8%) are most popular, as Figure 32 illustrates.



Figure 32: Subject of qualification being worked towards

Base: Where working towards a qualification who provided a valid response



Unweighted base = 59

With regards to the level of qualification being worked towards (see Figure 33), qualifications equivalent to Level 2 (24%) and Level 3 (35%) are most popular, including amongst those with no qualifications currently (35% working towards Level 2; 41% working towards Level 3).

Figure 33: Level of qualification being worked towards

Base: Where working towards a qualification who provided a valid response

	GL 2015 %	UK 2015 %
Level 1	10	6
Level 2	24	31
Level 3	35	35
Level 4+	14	11
Other	8	9
None	10	7
Unweighted bases	51	469



Supervisory and managerial qualifications and training

As reported earlier, more than a quarter of all construction workers in Greater London perform a supervisory or management role at their site (28%). Amongst those who do not currently perform supervisory/management roles a third want to become a supervisor or manager in the future, but have not done it before (33%) and a further 7% want to be a supervisor/manager and have done it before. Around a fifth of all workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (19%), while two fifths are certain that they do not want to be (41%).

Amongst the youngest workers, aged 16 to 24, the proportion that would like to be supervisors/managers is highest, at more than two fifths (43%), while amongst those aged 45 and over a significantly higher proportion of workers definitely do not want to be supervisors/managers (63%). The likelihood that workers want to be supervisors/managers also diminishes amongst those that have worked in the industry for at least 5 years, with 48% of those having worked in construction for 5+ years not wishing to be supervisors/managers. Analysis by contract type reveals that those who currently work for any agency (53%) are more likely than those employed directly (33%) or self-employed (30%) to want to be a supervisor/manager, but have not done it before, as are workers with level 1 qualifications (50%), compared with workers with higher-level (11% with level 4+ qualifications) or no qualifications (33%).



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 %
Greater London		307	33	7	41	19
UK		3457	20	6	53	21
Age	16 to 19 years*	12	25	0	42	33
	20 to 24 years	43	49	2	35	14
	25 to 44 years	186	35	8	35	22
	45+ years	57	16	9	63	12
Length of time inc construction	<1 year	46	35	0	39	26
	1 to 2 years	26	23	12	42	23
	3 to 4 years	69	52	4	26	17
	5+ years	163	26	10	48	16
Contract type	Employed directly	110	33	10	40	17
	Self-employed	166	30	6	44	20
	Agency	30	53	3	30	13
Highest qualification level	No Qualifications	150	33	3	43	21
	Level 1*	8	50	13	25	13
	Level 2	64	38	5	41	17
	Level 3	35	29	9	34	29
	Level 4+*	9	11	11	67	11

More than a quarter of all construction workers in Greater London (27%; 25% across the UK) and around three quarters of those who have had some form of supervisory or management responsibilities (74% cf. 87% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.

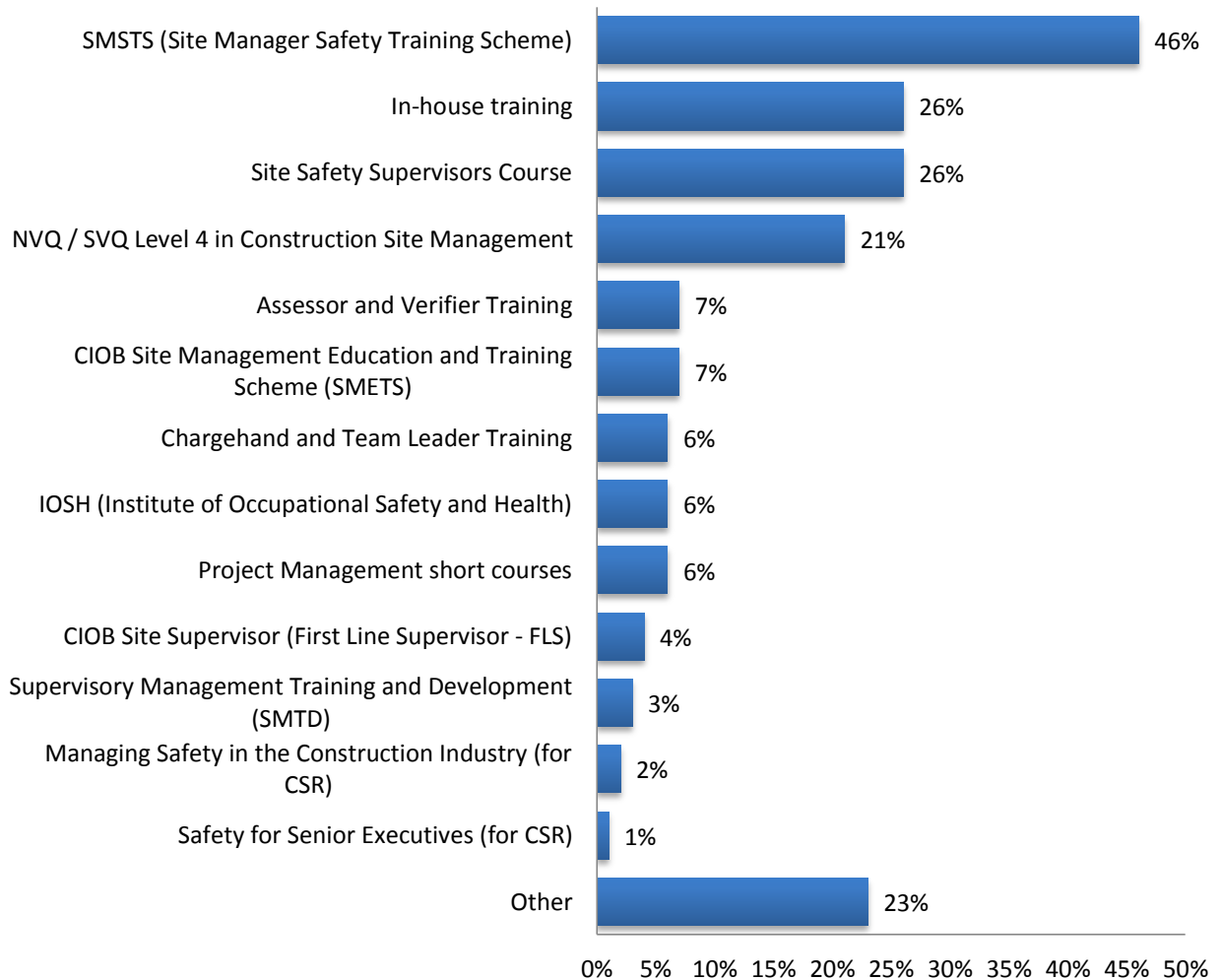
The proportion that has undertaken any managerial or supervisory training increases to around a third amongst workers aged 45 and over (34%) and those employed directly (32%). It increases to more than a third amongst those that have worked in construction for 5+ years (36%). Virtually all site managers have received formal training designed to improve managerial or supervisory knowledge or skills (90%).



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 by those who have undertaken any training (46%), followed by Site Safety Supervisors Courses (26%) and in-house training (26%). These were also the top three most mentioned types of supervisory training in 2012, although SMSTS was mentioned by fewer than (36%) and in-house training by a higher proportion (38%).

Figure 35: Types of managerial/supervisory training undertaken

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



Unweighted base = 106

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 2012 the vast majority of construction workers in Greater London (98%) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

Two fifths of the workforce (40%) holds a skill card/certificate, but have no other construction qualification, this is lower than in 2012 (56%); however is more consistent with findings from 2007 (43%).

Figure 36: Qualification status summary

Base: All respondents

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	98	96	80	98
Holds a formal construction qualification or a skills card/certificate	98	96	76	97
Holds a skills card/certificate	97	96	72	96
Holds a skills card/certification but no other qualification	40	56	43	30
Working towards a qualification	14	12	15	12
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4771</i>

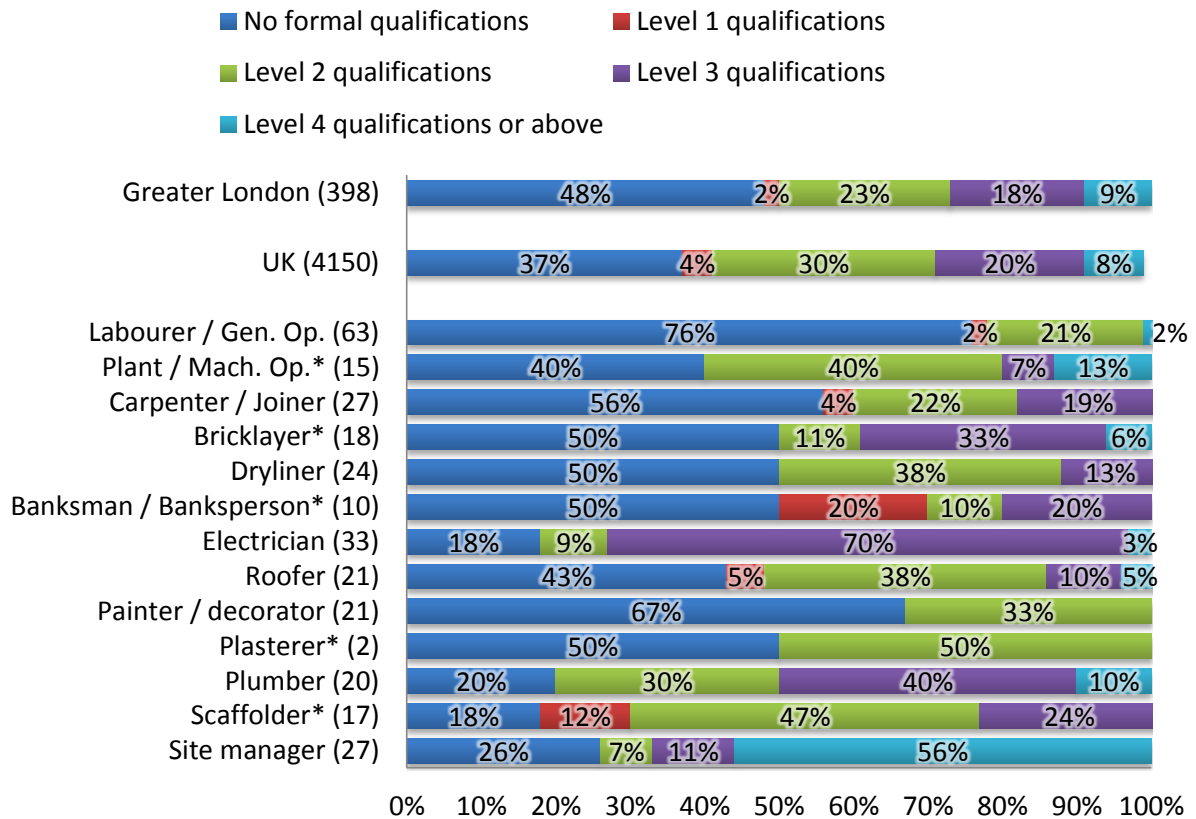
Based on all questions relating to qualifications it is possible to calculate each worker’s highest qualification level. Figure 37 summarises all construction workers’ highest level of qualification, overall and by occupation.

Overall while nearly half the construction workers in Greater London (48% cf. 40% in 2012 and a 2015 UK average of 37%) have no qualifications, Half have qualifications equivalent to Level 2 or above (50% cf. 49% in 2012; 58% across the UK in 2015).

By occupation site managers are most likely to hold the highest level of qualifications; over half hold qualifications at Level 4 or above (56%). Electricians and plumbers are also more likely than other occupations to hold qualifications equivalent to Level 3 or above (73% and 50% respectively).



Figure 37: Current qualification level, by occupation
 Base: All respondents who provided a valid response

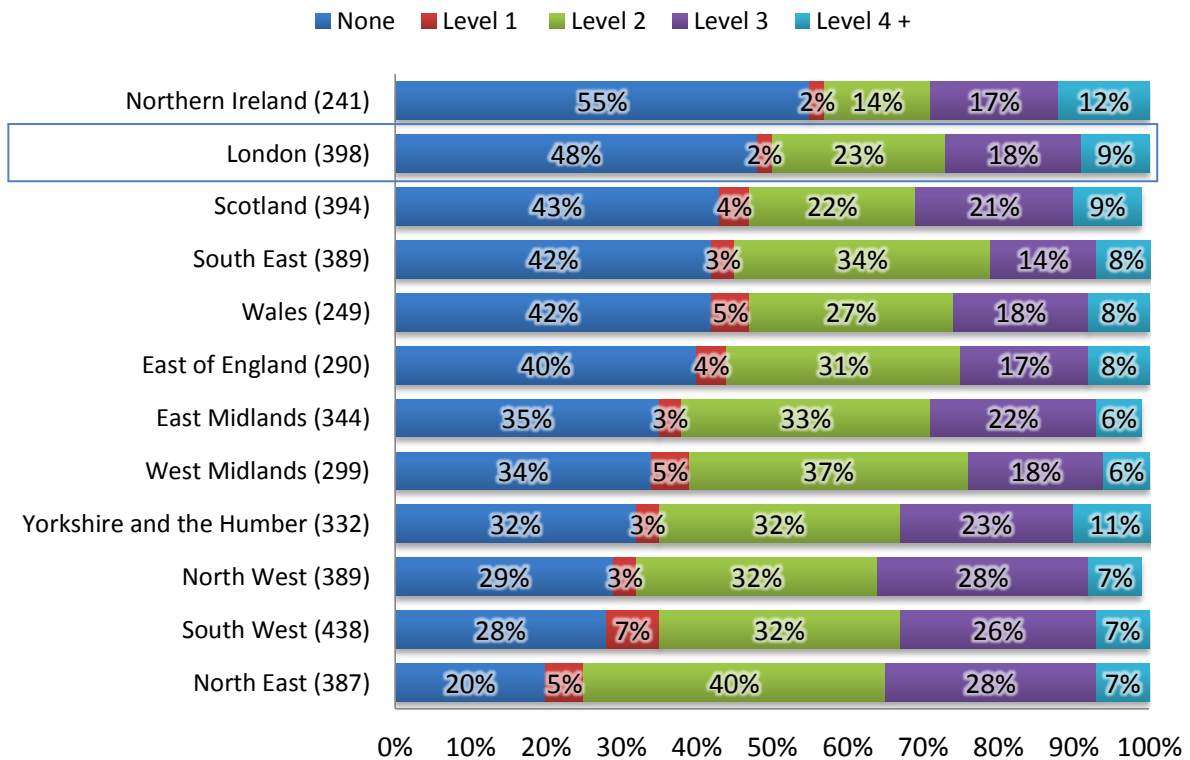


Unweighted bases in parentheses

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 varies quite considerably. These variances are summarised in Figure 38, which highlights that the construction workforce in Greater London is amongst the least qualified in the UK.



Figure 38: Current qualification level, by region/nation
 Base: All respondents who provided a valid response



Unweighted bases in parentheses

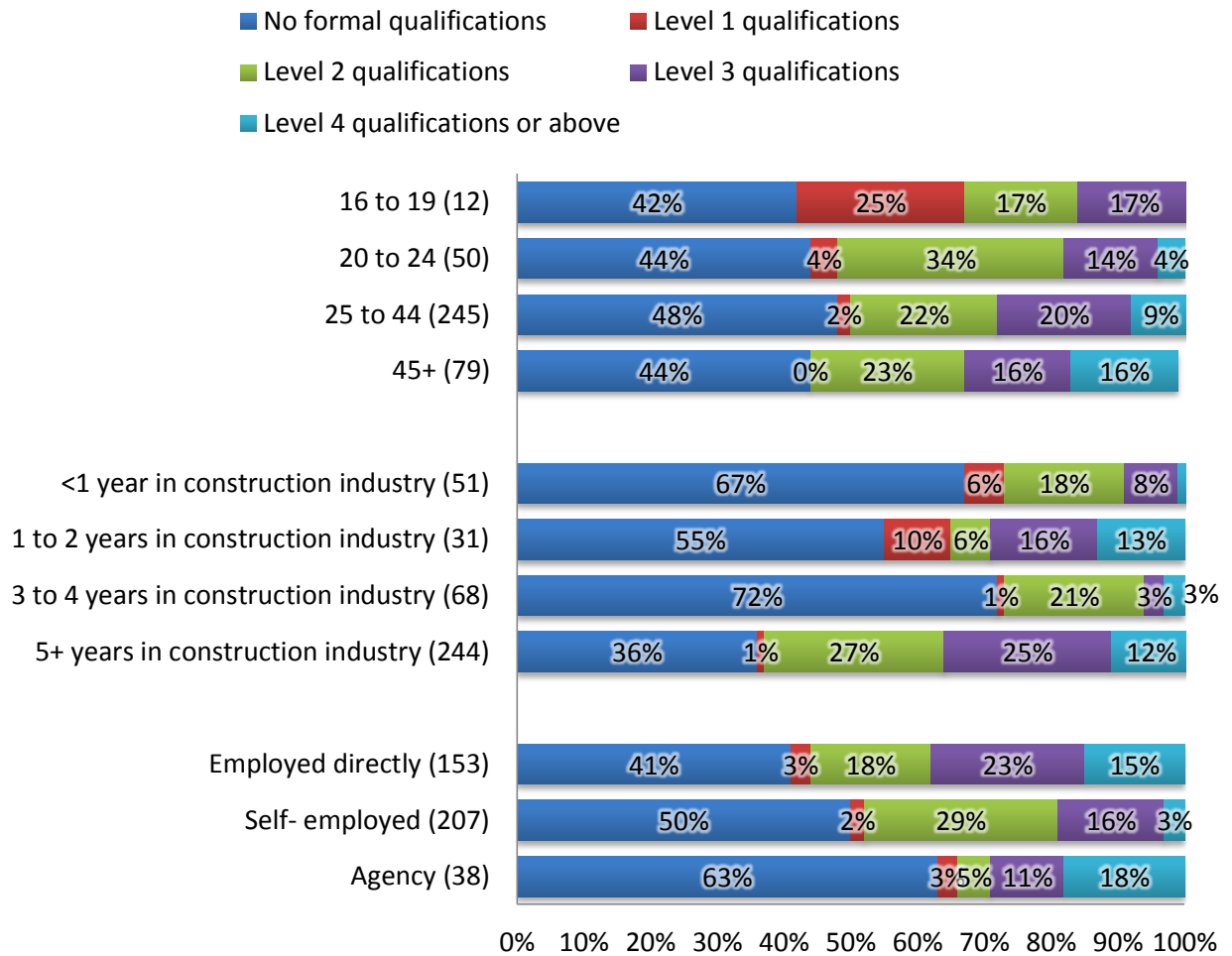
Looking at other sub-groups of construction workers, younger workers are most likely to have qualifications up to Level 1 or 2 (42% of 16-19 year olds; 38% of 20-24 year olds) and workers over the age of 25 are most likely to have qualifications at Level 3 or 4+ (29% of 25-44 year olds and 32% of 45+ year olds). A similar pattern is evident in terms of length of time in the construction industry, with those having worked in construction for 5+ years more likely than those having spent less time in the industry having qualifications at Level 3 or 4+ (37%, compared with 12% that have less than 5 years experience).

In terms of contract type, as already mentioned, workers who are currently working for an agency are less likely than those employed directly or self employed to have any qualifications (63% have none). In addition workers employed directly by a company are more likely to have higher level qualifications, compared with workers who are self-employed; around two fifths of workers employed directly have qualifications equivalent to Level 3 or above (38%), compared with around a fifth of self-employed construction workers (19%). Figure 39 illustrates these variances.



Figure 39: Current qualification level, by other key variables

Base: All respondents who provided a valid response



Unweighted bases in parentheses



Geographic mobility

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

- Reasons for working in current location;
- Comparisons of current location, with workers' region/nation of origin;
- Proportion of construction workers' career that has been spent working in the current region/nation;
- Whether 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

As in the 2012 survey all workers were asked what made them decide to work in the region/nation that they are currently working in, although the code frame used for the responses was slightly different. Within Greater London the most likely reason for working in the region/nation is that their employer sent them there (44% cf. 41% in 2012).

The next most likely reason was because they grew up there/have always lived there (35%), with a further 4% mentioning other reasons to do with their family. Overall family reasons are mentioned to a greater degree than in 2012 (39% cf. 21%).

Figure 40: Reasons for choosing to work in current location

Base: All respondents

	GL 2015 %	UK 2015 %		GL 2012 %
You grew up here/have always lived here	35	55	Family	21
Family reasons	4	6		
Employer sent you here	44	36	Employer sent me	41
Came to the area to take up this or another job	7	5	More regular opportunities	18
There are more jobs available in this area	16	6	More jobs here	29
Construction work is better paid in this area	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	1	Prefer living here	14
Better promotional prospects in this area	2	1	More chance of promotion	4
<i>Unweighted bases</i>	<i>452</i>	<i>4771</i>		<i>410</i>

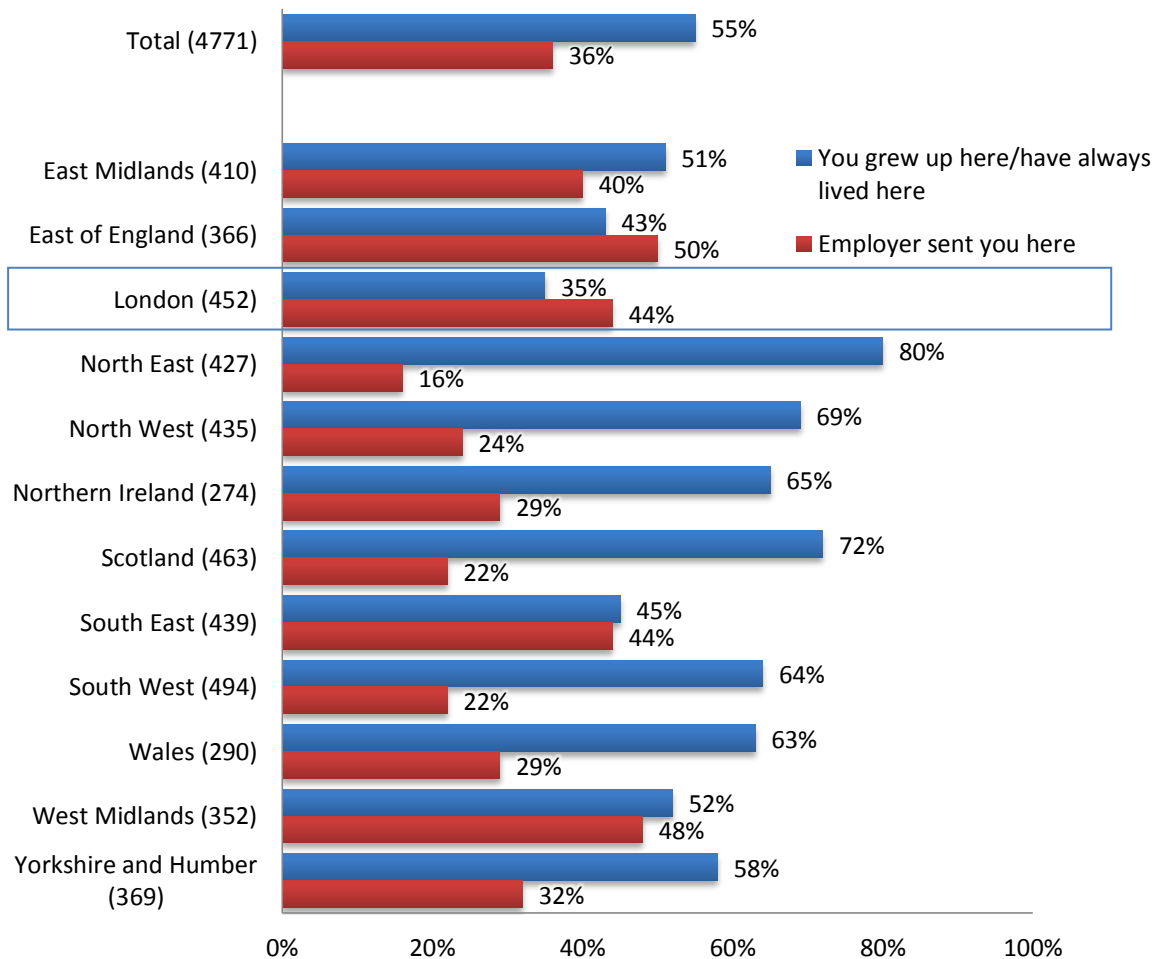


Workers over the age of 45 are more likely than those under 45 years to state that they work in their current location because that's where they have always lived/grew up (42%, compared with 33%), while younger workers aged 16-19 (69%) are more likely than those aged 20 years and over (43%) to say that it is because their employer sent them.

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 Greater London are less likely than the UK average to cite having always lived there and more likely to say their employer sent them.

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

Base: All respondents



Unweighted bases in parentheses

Just under half of all workers have worked within their current region/nation for their entire construction career (46%), compared with a lower proportion in 2012 (37%) and 2007 (28%). With a further 38% that have remained in this region/nation most of the time, this means the majority of all workers have remained in the current region/nation for all or most of the time (84%).

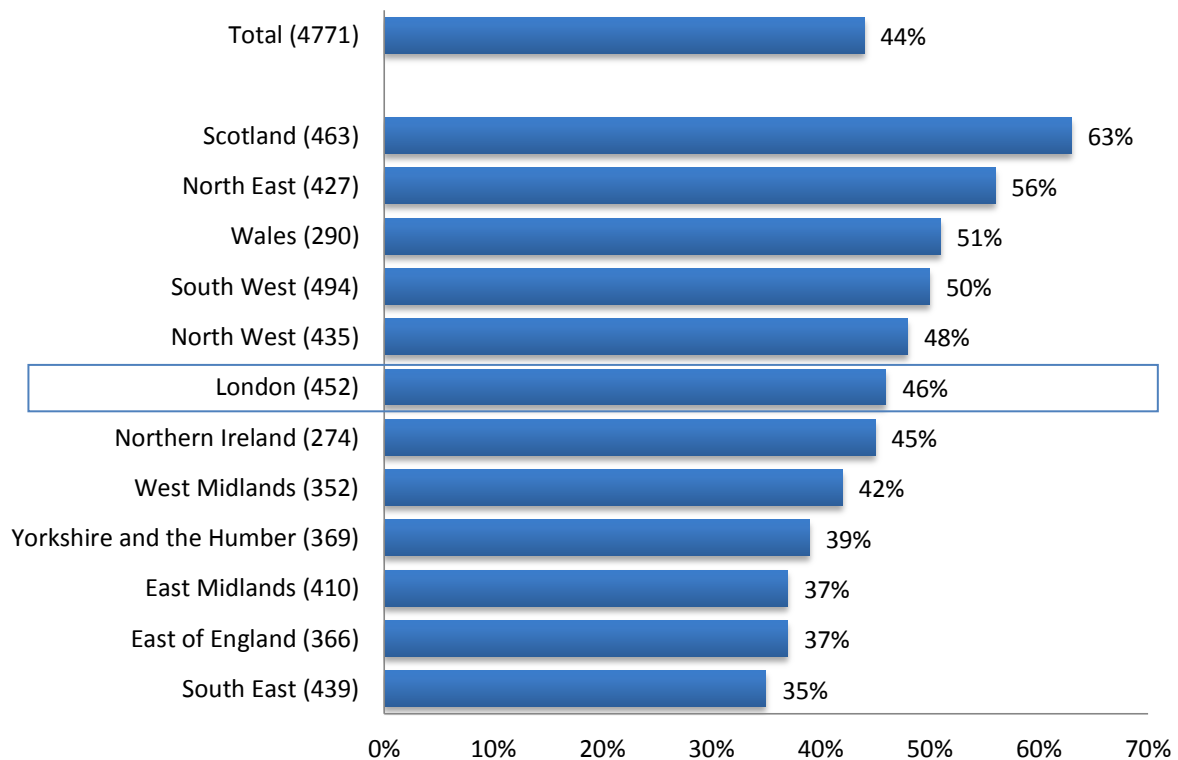


Figure 42: Proportion of construction workers' career worked in current region/nation
Base: All respondents

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %
All of your time	46	37	28	44
Most of it	38	34	43	36
Around half your time	8	16	17	8
A small proportion of your time	4	7	10	7
Only on this job (this is the first site you've been to in this region/nation)	2	2	1	3
Don't know	2	3	1	2
<i>Unweighted bases</i>	<i>452</i>	<i>410</i>	<i>355</i>	<i>4771</i>

The proportion of construction workers in Greater London that have spent all of their time in the region/nation is higher amongst the youngest workers (62% of 16 to 19 year olds cf. 48% of 20 to 44 year olds and 35% of 45+ year olds) and similarly high amongst those that have worked in the construction industry for the shortest period of time. There are quite significant variations again by region/nation, but Greater London is similar to the UK average in this respect.

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



Unweighted bases in parentheses



In terms of the regions/nations in which workers' current employer operates in, mostly workers reported that their employer operated within the region/nation they were currently working in as shown in Figure 44. The proportion for which this is the case is 84% in Greater London.

Figure 44: Region/nation employer operates in, 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	83	16	8	13	3	2	4	12	8	7	24	11
East of England	12	67	15	11	2	1	4	19	8	7	9	6
Greater London	10	27	84	13	4	1	5	27	12	7	9	6
North East	9	9	8	93	3	1	4	6	7	7	8	15
North West	11	9	8	14	93	1	4	6	7	11	11	10
Northern Ireland	3	3	3	2	1	99	3	2	1	3	2	1
Scotland	6	4	6	9	1	2	97	2	4	4	5	4
South East	13	23	27	12	3	*	4	65	21	7	11	6
South West	9	5	7	10	3	*	4	18	83	10	15	5
Wales	6	5	5	8	3	*	4	3	10	96	14	4
West Midlands	21	9	8	12	6	*	4	7	12	9	92	8
Yorkshire and the Humber	15	10	7	19	4	1	5	6	8	8	8	88
Republic of Ireland	1	2	3	*	*	2	1	1	1	2	2	*
Other parts of Europe	*	*	*	1	0	0	0	0	*	0	1	0
Outside Europe	*	1	0	*	0	0	0	0	*	0	*	0
Other / Unsure	1	3	2	3	2	*	1	3	1	*	1	3
<i>Unweighted bases</i>	410	366	452	427	435	274	463	439	494	290	352	369

Region/nation worked in before current site

Thinking about the last construction site they worked on, before this one, in the majority of cases workers' last site is 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. More than three quarters of construction workers in Greater London (77%) state that their last site was also in Greater London so they fall into the mid-range across regions/nations in this respect.



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

Base: All respondents *denotes less than 0.5%

Region/nation of last site	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	W A %	W M %	YH %
East Midlands	60	7	*	*	1	0	0	3	1	1	6	4
East of England	5	49	4	1	0	0	0	7	1	1	1	1
Greater London	2	23	77	2	1	4	1	19	4	*	2	1
North East	1	3	0	86	0	0	0	0	0	0	0	6
North West	3	2	1	1	89	1	*	*	1	7	3	2
Northern Ireland	1	1	*	0	*	86	2	0	0	1	*	0
Scotland	1	0	1	3	0	2	94	0	*	1	*	1
South East	6	9	11	1	1	*	*	56	9	1	2	2
South West	*	1	1	*	0	*	0	7	76	2	5	0
Wales	1	1	*	0	1	0	1	*	2	83	3	*
West Midlands	8	1	1	1	3	1	1	1	3	1	75	1
Yorkshire and the Humber	9	2	*	3	1	0	1	0	1	0	*	82
Republic of Ireland	0	*	*	0	0	3	*	*	0	1	1	0
Other parts of Europe	0	0	*	*	*	*	1	*	*	0	*	0
Outside Europe	0	*	0	0	1	1	*	*	*	0	0	0
Other/ Unsure	2	1	1	2	1	1	1	5	2	1	1	*
<i>Unweighted bases</i>	369	332	393	336	357	258	385	392	414	272	322	307

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 half of all construction workers in Greater London were interviewed in the same region/nation in which they were living in when they started their construction career (50%). However, there are considerable variations in the extent to which workers have remained in their original locality. As Figure 46 summarises workers currently based in Greater London are least likely to have remained in the same region/nation in which they were based when they started their construction careers.



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 %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	78	5	*	1	*	0	0	1	*	0	3	3
East of England	2	55	2	0	1	0	0	7	*	0	1	0
Greater London	3	6	50	1	2	0	*	7	1	*	2	*
North East	0	*	1	96	*	0	*	*	1	0	0	2
North West	1	*	*	1	91	0	*	0	1	3	2	2
Northern Ireland	1	1	0	0	0	97	1	1	1	0	1	0
Scotland	1	1	1	1	0	0	96	0	*	0	*	0
South East	2	2	10	0	0	0	0	55	7	0	1	0
South West	*	*	0	0	*	0	0	8	76	0	2	0
Wales	*	1	0	0	1	0	0	0	1	94	2	0
West Midlands	6	*	*	*	2	0	0	1	3	1	84	0
Yorkshire and the Humber	2	3	*	1	1	0	*	0	1	0	0	90
Republic of Ireland	0	0	1	0	*	1	0	1	0	*	1	0
Other parts of Europe	*	1	2	0	*	*	*	6	2	0	1	*
Outside Europe	0	0	*	*	0	0	0	0	*	0	0	0
Other/ Unsure	3	19	8	0	1	*	0	8	5	1	2	2
Outside of UK and ROI	1	5	23	*	1	1	2	4	*	*	0	1
<i>Unweighted bases</i>	318	302	345	386	389	215	409	374	478	231	291	292

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 once again there are great variations by region/nation and that construction workers in Greater London are amongst those most likely to have moved there from another region/nation. They are most likely to have moved into the region/nation from the South East (24%).



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

	UK 2015 %	UK 2012 %	Higher than average mentions for other regions/nations
Northern Ireland (142)	96	98	
Scotland (372)	95	86	
North East (348)	92	82	
North West (322)	90	85	
Wales (186)	83	85	
Yorkshire and the Humber (264)	82	83	North East 8%
West Midlands (249)	79	61	
South West (372)	76	72	
East Midlands (289)	65	64	Yorkshire and the Humber 9%
Greater London (262)	58	64	South East 24%,
South East (276)	55	46	London 14%, South West 8%
East of England (251)	50	49	London 20%, South East 9%
<i>Unweighted bases for 2015 in parentheses</i>			

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.

As in 2012, a significant minority of construction workers in Greater London are travelling into the region/nation for work from another region/nation in which their current residence is based (29%, including those travelling into the region/nation from a neighbouring region/nation).



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

Base: All respondents who provided a valid response

	UK 2015			UK 2012		
	% from same region/nation	% from different region/nation ¹	% from neighbouring region/nation	% from same region/nation	% from different region/nation	% from neighbouring region/nation
Northern Ireland (95)	99	1	0	98	2	2
Scotland (258)	96	4	0	92	8	2
Wales (183)	93	7	5	91	9	6
North East (166)	97	3	1	87	13	13
North West (371)	88	12	12	87	13	12
Yorkshire and the Humber (297)	86	14	14	85	15	13
South West (317)	85	15	11	82	18	17
East Midlands (271)	74	26	23	69	31	27
West Midlands (250)	82	18	16	68	32	24
East of England (303)	63	37	27	67	33	26
Greater London (375)	71	29	25	63	37	30
South East (375)	58	42	38	61	39	36

Unweighted bases for 2015 in parentheses

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

After the South East (58%) and the East of England (63%) construction workers in Greater London are the least likely to currently be living in the same region/nation as the site they work on (71%).

¹ This percentage includes those travelling to/from a neighbouring region/nation.



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	74	12	1	1	0	0	0	9	*	0	2	7
East of England	2	63	13	0	0	0	0	8	1	0	1	0
Greater London	0	12	71	0	0	0	0	12	1	0	0	0
North East	0	2	0	97	0	0	0	0	0	0	0	5
North West	3	0	0	0	88	0	0	1	*	5	3	2
Northern Ireland	2	*	0	0	0	99	2	1	1	1	0	0
Scotland	0	0	1	1	1	0	96	0	0	0	0	0
South East	3	3	12	0	0	0	0	58	7	0	0	0
South West	*	0	0	0	0	0	0	8	85	0	5	0
Wales	0	1	0	*	3	0	0	0	2	93	6	0
West Midlands	7	1	*	1	8	0	0	1	2	0	82	0
Yorkshire and the Humber	8	1	0	*	1	0	1	0	1	0	*	86
No permanent address	1	3	2	0	0	1	1	1	1	*	*	0
<i>Unweighted bases</i>	275	235	284	314	340	155	314	306	364	206	216	291

Furthest distance worked in last 12 months

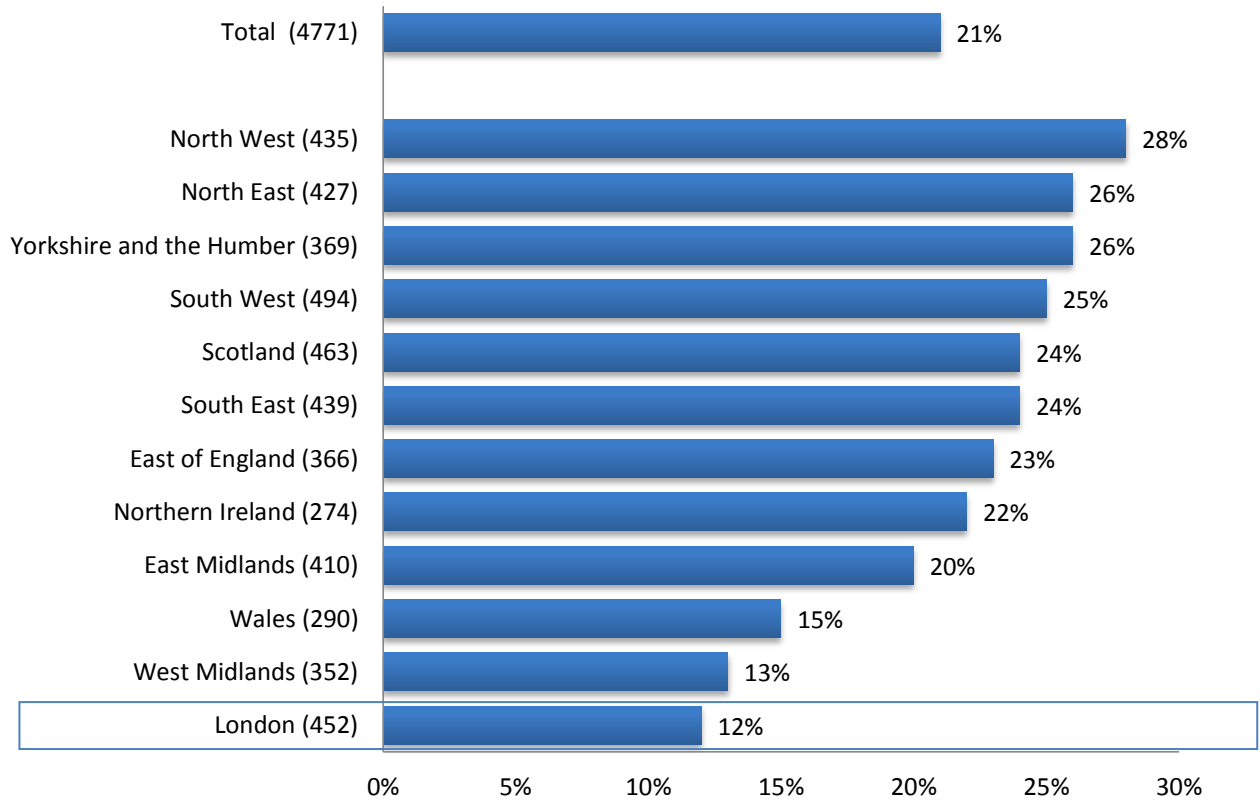
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within Greater London, more than a third of construction workers have worked no more than 20 miles away (35%) and a further 3 in 10 have worked between 21 and 50 miles away (29%). This leaves nearly a third that have worked more than 50 miles away from their permanent home (31%), with 1 in 5 that have worked between 51 and 100 miles away (19%) and 1 in 8 that have worked more than 100 miles away (12%).

Once again there are variations in this regard, with workers based in Greater London least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (12% cf. 21% across the UK).



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

Use of temporary accommodation

Nationally, 1 in 20 (6%: as in 2012) construction workers reported that they were currently staying in temporary accommodation while working at their site. By region/nation, the proportion is second highest in Greater London (8%), whereas in the 2012 survey the proportion in Greater London was closer to the UK average (5%, compared with 6%).



Figure 51: Percentage of workers in temporary accommodation
 Base: All respondents

	UK 2015 %	UK 2012 %
UK (4771)	6	6
East of England (366)	11	7
Greater London (452)	8	5
Scotland (463)	7	6
South West (494)	7	3
South East (439)	6	8
East Midlands (410)	5	7
North East (427)	4	7
Wales (290)	4	1
Yorkshire and the Humber (369)	4	3
Northern Ireland (274)	3	1
West Midlands (352)	3	11
North West (435)	2	5
<i>Unweighted bases for 2015 in parentheses</i>		

Journey distance to work

Within Greater London, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 19 miles which is less than the average of 30 miles reported in 2012. The Greater London mean compares to a mean of 22 miles across the UK.

Nearly a third (31%) travelled less than 10 miles from their current residence to the site they work, whilst 22% travelled between 10 and 19 miles, 17% travelled between 20 and 49 miles, 3% 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 (36% of all construction workers in Greater London) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 4% expect to work for another week or so, or less; 9% expect another month; 16% about 3 months; 21% between 6 months and a year and 14% expect to still be working for their current company/agency in more than a year's time. A third of all temporary workers in the region/nation did not know how much longer they could expect to be working for their current company/agency (36%).

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.



A quarter of all construction workers in Greater London (25% cf. 22% in 2012) do not expect to work on that site for more than a month, including 6% that only expect to be there for about a week or less. A third anticipated being on site for more than a month, but less than a year (34%), compared with a slightly higher proportion in 2012 (37%). A fifth expect to stay on that site for a year or longer (19%), which is an increase compared with 2012 (14%), suggesting more stable employment than in 2012. However, more than a fifth of workers (22% cf. 26% in 2012) did not know how much longer they could expect to be on site, indicating that a significant minority of temporary workers are living with a certain amount of uncertainty and insecurity.

Young workers (although not the youngest), aged 20 to 24 years are also more likely to be unsure of how much longer they can expect to work for (33% don't know).

Amongst the various trades/job roles, bricklayers (58%), plant and machine operatives (45%) and carpenters/joiners (44%) are most likely to indicate that they expect to work at that site for more than a year; labourers/general operatives (22%) and banksman/bankspersons* (21%) are least likely to indicate that this is the case. (*Caution: Small sample base.)

Expected next site location

Seven in ten construction workers in Greater 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 (71% cf. 65% in 2012). The remaining 3 in 10 workers are sure that this will not be the case (4%); that it depends where the work is (16%); or that they don't know (9%).

By region/nation, construction workers in Greater London compare with those in Scotland who are most confident in this respect (81%) and those in Northern Ireland who are least confident (68%).

Construction workers who have worked in construction for the longest period of time are more likely to be confident of this (77% of those who have worked in the industry for 5+ years, cf. 56% of those who have worked in construction for under a year). By trade/occupation, once again site managers are most confident (87%).

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. It can be seen that construction workers in Greater London that do not expect to be able to commute daily to their next job are amongst those least likely to expect to remain in the region/nation for their next job (60%), although the proportions are much lower amongst construction workers in the East of England (40%) and Yorkshire and the Humber (50%).



Figure 52: Expected location of next site/job

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

Expected location of next job	Region/nation currently working in											
	E M	EE	G L	N E	N W	NI	SC	SE	S W	W A	W M	Y H
East Midlands	61	0	0	0	0	0	0	1 4	0	0	0	0
East of England	0	4 0	15	0	0	0	0	7	0	6	8	10
Greater London	6	2 0	60	10	0	0	0	1 4	0	6	0	0
North East	0	6	0	85	0	0	0	0	0	0	0	20
North West	6	3	0	0	83	8	0	0	0	6	0	0
Northern Ireland	0	0	0	0	0	6 9	0	0	0	0	0	0
Scotland	0	0	0	0	0	0	7 5	0	8	0	0	0
South East	11	6	15	0	8	0	0	2 9	8	6	0	0
South West	0	3	0	0	0	0	0	7	77	6	0	0
Wales	0	3	0	0	0	0	0	0	0	69	8	0
West Midlands	11	9	0	0	0	0	0	0	8	0	58	10
Yorkshire and the Humber	0	3	0	0	0	0	0	0	0	0	0	50
Outside Europe	0	3	0	0	0	8	0	7	0	0	0	0
Other / Unsure	6	6	10	5	8	1 5	2 5	2 1	0	0	25	10
<i>Unweighted bases</i>	18	35	20	20	12	13	12	14	13	16	12	10

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.

Compared with 2012 there has been an increase in the proportion of construction workers that have been working on new housing within Greater London; up from 66% to 73%. For all other types of projects the proportion of construction workers that have worked on them has fallen since 2012. The proportion that have undertaken commercial work has remained at a similar level in both 2012 and 2015 (39% and 36% respectively), while the proportion that have worked on housing repair and maintenance has decreased each year since 2007 (from



53% in 2007 to 36% in 2012 to 29% in 2015). The proportion of construction workers that have been involved in private industrial work has decreased since 2012 (from 34% to 26%) as has the proportions that have been involved with public non-housing work (from 37% to 31%) and infrastructure projects (from 35% to 25%).

Overall half the Greater London construction workers have only worked on one project type (51%), compared with just over a third in 2012 (37%), which again suggests a pattern of increased stability in the sector.

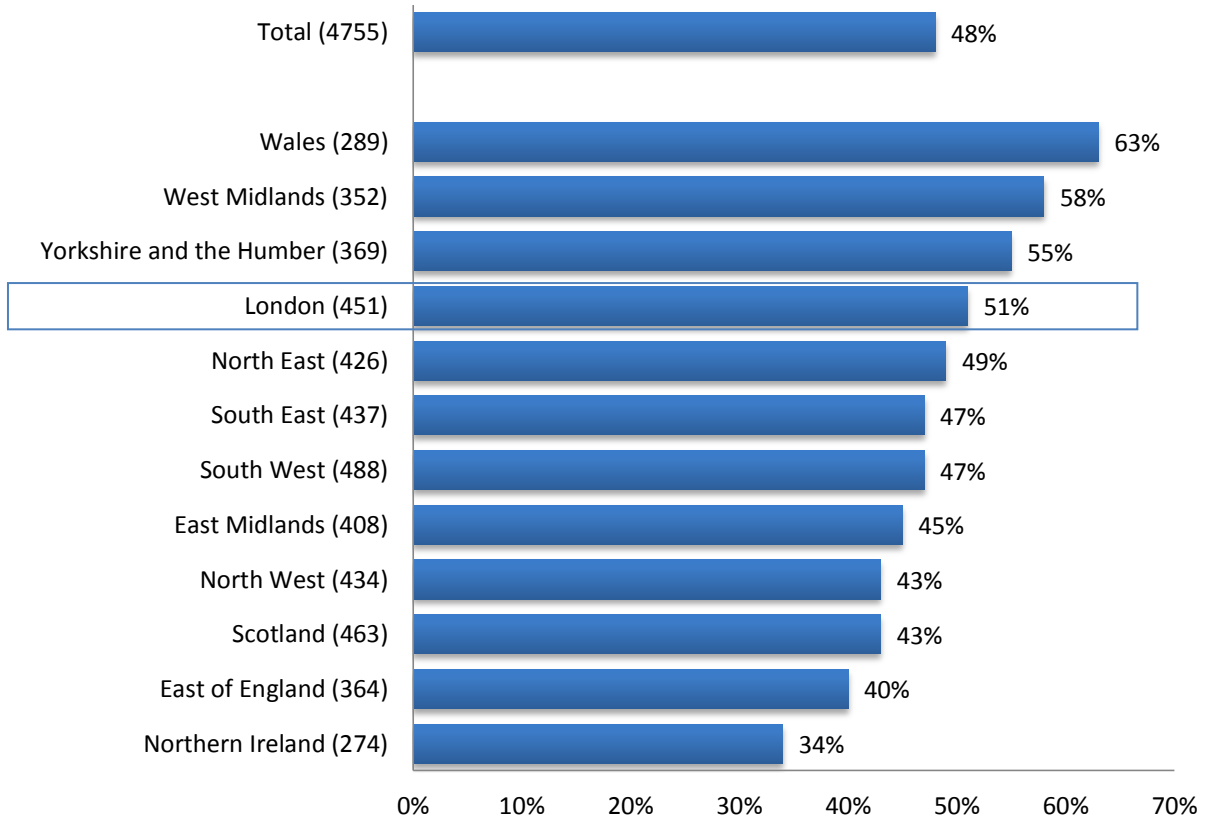
Figure 53: Type of projects spent significant periods on
Base: All respondents

	GL 2015 %	GL 2012 %	GL 2007 %	UK 2015 %
New housing	73	66	65	83
Housing repair and maintenance including extensions/loft conversions	29	36	53	36
Commercial work such as shops, office, pubs etc	36	39	53	35
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	26	34	38	30
Public non-housing work such as schools, sports facilities, landscaping	31	37	49	33
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	25	35	19	21
ONE TYPE ONLY	51	37	29	48
TWO TYPES	16	23	19	14
THREE TYPES	8	12	19	11
FOUR TYPES	8	12	12	8
FIVE TYPES	8	7	14	9
SIX TYPES	7	7	6	9
<i>Unweighted bases</i>	452	410	355	4771

The number of project types worked on varies significantly by region/nation, as Figure 54 illustrates. Greater London as a region/nation is more likely than the UK average to report its' construction workers working on one project type (51%, compared with 48%). The Greater London proportion compares with the highest proportion reported in Wales (63%) and the lowest proportion reported in Northern Ireland (34%).



Figure 54: Proportion of workers that have only worked on one project type
Base: All respondents



Unweighted bases in parentheses

The likelihood that workers have worked only on one project type declines, as age increases, as one would expect (from 62% of 16 to 19 year olds to 35% of 45+ year olds). By current trade/occupation, plant and machine operatives (70%) and scaffolders (65%) are most likely to have only worked on one project type, while carpenter/joiners (41%) and site managers (43%) are least likely. Bricklayers (17%) are most likely to have worked on all six project types.



Figure 55: 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 %
Banksman/banksperson*	14	57	7	14	7	14	0
Dryliner	26	58	19	12	4	4	4
Labourer / Gen. Op.	68	56	21	4	9	6	3
Scaffolder	20	65	5	0	10	15	5
Plasterer*	2	100	0	0	0	0	0
Bricklayer	24	50	21	8	4	0	17
Plumber	23	57	0	4	0	22	9
Plant / Mach. Op.	20	70	25	5	0	0	0
Carpenter / Joiner	32	41	19	16	6	3	0
Roofer	22	45	18	27	5	0	0
Painter / decorator	21	62	5	5	10	0	19
Site manager	30	43	23	10	0	17	7
Electrician	38	32	29	5	13	8	11

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. Within Greater London, nearly two fifths of construction workers say they definitely will be (38%); a further two fifths think it is very or quite likely (40%); 6% consider it unlikely; just 3% say they definitely won't be and a further 3% hope to be retired by then, while 11% don't know.

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 39% believe they will definitely want to be working in the construction sector, 25% believe it is very likely they will want to be working in the construction sector and 15% believe it is quite likely they will want to be working in the construction sector. Only 11% think on any level that they will not want to be working in the construction sector in 5 years time which is similar to 2012 (12%).



The Greater London construction workforce 2014-15 summary

Across the wide range of issues covered within the 2015 survey it seems there are a number of signs of increased stability amongst the UK construction workforce but this is not reflected in the findings within Greater London. There has been little change in the propensity to be employed directly by companies as opposed to being self-employed or employed by an agency and construction workers in Greater London are less likely than the UK average to be directly employed (39%, compared with a UK average of 54%). The proportion that is in temporary employment is also significantly higher in Greater London than the UK average (36%, compared with 23%).

Construction workers in Greater London work, on average, more hours per week than the UK average (46 hours, compared with 44 hours) and they are significantly more likely than workers elsewhere to work more than 50 hours per week (42%, compared with 23%).

In terms of project type there has been increased stability in Greater London, as there has been across the UK, with half of all construction workers in Greater London having worked on just one project type (51%), compared with a third in 2012 (37%). The proportion of workers that have worked on new housing is up, from 66% to 73%, which reflects more confidence in the sector, again, reflecting the trend UK-wide.

Some uncertainty does however remain with just over a third of temporary workers not knowing how much longer they can expect to be working for their current employer/agency (36%) and nearly a quarter of all workers not knowing how much longer they can expect to be on their current site (22%).

In terms of skills and qualifications it is encouraging to note that virtually all workers continue to hold some form of skill card or certificate, with this proportion being on a par with the UK average in Greater London (98%, compared with 96%).

More than half of all construction workers in Greater London (52%) hold some form of qualifications but this proportion is significantly lower than the UK average (of 63%). The proportion of workers in Greater London that consider they need training in basic skills is higher than the UK average (26%, compared with 14%) and they are significantly more likely than the UK average to consider they need training in speaking English (16%, compared with 7%). Half of all construction workers in Greater London hold qualifications equivalent to Level 2 or above (50%) and they are below the national average in this respect (58%).

In line with the UK average, around 1 in 7 Greater London construction workers are currently working towards a qualification, but the proportion would need to be higher to close the gap between the lower qualification levels in Greater London and the average qualification levels across the UK.

In terms of mobility the proportion of construction workers in Greater London that have worked within the region for their entire construction career has been on an upward trend since 2007 (46% cf. 37% in 2012 and 28% in 2007). In the majority of cases (77%) workers' last construction sites were in Greater London. However, this proportion is lower than in many other regions/nations, the range being from 49% in the East of England to 94% in Scotland.



Furthermore, only half of construction workers in Greater London (50%) were living in the region when they got their first job in construction in the UK. This proportion is the lowest across all regions/nations. These findings suggest that Greater London has one of the highest rates of movement in and out of the region across the UK.

One in eight construction workers (12%) have travelled 100+ miles to construction sites for work in the last 12 months and compared with workers in other regions/nations, they are least likely to have done so. A slightly higher than average proportion of construction workers within Greater London were in temporary accommodation at the time of the survey (8%, compared with a UK average of 6%).



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