

Workforce Mobility and Skills in the UK Construction Sector 2022

North West Report - May 2023



Study prepared by BMG Research from a commission by CITB.

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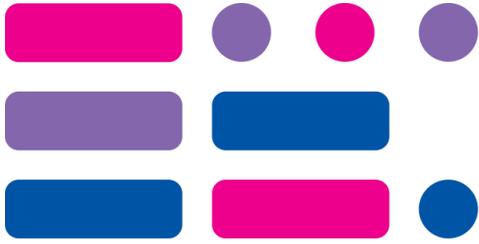
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Executive summary

CITB commissioned BMG Research to undertake the 2022 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2018/19, 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 3,005 construction workers undertaking manual roles on sites across the UK and 271 interviews were conducted with construction workers in the North West region.

Profile of the sample

All but 4% of construction workers in the North West are male. Around two-fifths (43%) are aged under 35, which is a higher proportion than the general UK 16-64 years' workforce as a whole (36%), but similar to the UK average¹ in the survey (45%). Less than one in twenty (3%) are aged 16 to 19, which is lower than the UK average (6%). Just 8% of construction workers are aged 60 or over.

Overall, 1% of the North West construction workforce represents an ethnic minority group, compared with a higher incidence of 13% in the North West 16-64 years' population as a whole. This is lower than the UK survey average of 5%, which in turn compares to the general UK 16-64 years' population of 12%. On this basis there is a significant gap between the incidence of residents from ethnic minority groups and the extent to which this is represented within the construction worker population in the North West.

Around one in twenty construction workers in the North West (4%) originate from another country as compared to a UK average of 17%.

In line with 2018/19, the majority of North West construction workers have lived in the UK all of their life (93% compared to 91% in 2018/19). Again, as was the case in 2018/19, this is significantly higher than the UK average of 80%. Less than 1% have lived in the UK less than five years.

By trade/occupation, the highest proportion of the North West sample is accounted for by labourers/general operatives (24%), bricklayers (13%), site managers and plant/machine operatives (10% in each case).

Around a fifth (22%) of all those interviewed in the North West perform a supervisory or management role on their site, which is fewer than in 2018/19 (37%) and 2015 (25%), and with the UK average (27%).

Three in ten construction workers in the North West (29%) are self-employed, somewhat down on 2018/19 (39%) and 2015 (40%), and lower than the national average of 42%. There has been a corresponding increase in the proportion who report being directly employed, from 56% to 62%, and this is above the national average of 48%. Around one in ten (9%)

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

report working for an employment agency, higher than in 2018/19 (4%) but similar to the UK average (9%).

Three in ten construction workers in the North West (29%) are employed on a temporary, rather than a permanent basis (70%), very much in line with 2018/19 (27% and 72% respectively). The remainder believe they have an 'other' type of contract arrangement (1%). The North West is in line with the UK average of 29% with regard to the profile of its construction workforce in terms of temporary employment contracts held.

Construction workers in the North West, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (67%, compared with a UK average of 59%), while 12% work more than 50 hours a week, down on 2018/19 (22%), but in line with the UK average of 19%.

Work history

Time in the sector

Three in ten (29%) of all construction workers in the North West have worked in the construction industry for over 20 years, in line with 2018/19 (33%), and the UK average (30%). More than half (54%) have worked in the industry for at least 10 years, in line with the 2018/19 (52%).

There has been an increase in the proportion of North West construction workers who have worked pretty much continuously in the industry, from 49% in 2018/19 to 66% in the latest survey, placing the North West above the UK average in this respect (61%). Consequently, the proportion who have only ever worked in construction has also increased, from 53% in 2018/19 to 76% in the latest survey.

Previous non-construction jobs

Amongst the 12% of construction workers in the North West who worked in another sector before starting work in construction, the most common sectors in which construction workers had started their careers were manufacturing (28%), wholesale and retail trade (21%) and transportation and storage (13%). The pattern of response largely reflects that in the UK, with a decline in those who started in manufacturing.

In terms of the job roles that respondents have held in other sectors, the highest proportions were in skilled trades occupations (26%) and elementary administration and service occupations (23%).

Occupational switching within the construction sector

Overall, a third (33%) of all construction workers in the North West have worked in more than one construction trade or occupation whilst working in the construction industry, a lower proportion than in 2018/19 (39%) but similar to 2015 (31%), and with the UK average (35%). Amongst this group, 20% had worked in 1 previous role, 43% had worked in 2

previous roles, 31% had worked in 3 roles/occupations and 6% had worked in 4 roles/occupations.

Workers are most likely to have previously worked as a labourer/general operative (47%), while 12% (in each case) had previously worked as a carpenter/joiner, bricklayer or floorer. This is very much in line with the UK average.

Over four in five (86%) construction workers in the North West would like to carry on in the same trade or occupation, a higher proportion than 2018/19 (76%) and the UK average of 80%. Around one in twenty (4%) would like to change their trade/occupation, which is lower than in 2018/19 (16%) and slightly lower than the UK average (both 7%). The remainder would like to leave construction (4%) or were unsure (6%).

Qualifications and skills

Skills cards/certificates

While over nine in ten (91%) of all construction workers in the North West report holding a skill card or certificate (e.g. CSCS or CSR), this is a reduction on the 98% to 99% who did so in previous surveys. While this reflects the UK picture, which has seen a similar decline (from 97% to 93%), the decrease in the North West, along with the West Midlands and Scotland, is the most marked, such that having had the highest levels of card-holding in 2018/19, they now have among the lowest levels of card-holding. Correspondingly, the proportion who have no cards has risen from 2% in 2018/19, to 8% in the latest survey.

In terms of the type of skill card or certificate held by construction workers in the North West, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (81%), but to a lesser extent than 2018/19 (89%) and 2015 (90%). Over one in ten (13%) hold the CPCS, in line with 2018/19 (12%), and 4% hold the CISRS or the CSR (NI).

Construction-specific qualifications

Overall, more than two-fifths (42%) of construction workers in the North West report having no construction-related qualifications when they started their first job. This is significantly lower than the 68% who reported this in 2018/19, and the 67% who did so in 2015, and lower than the UK average of 47%.

Overall, nearly three quarters (72%) of construction workers in the North West report holding a construction-related qualification, a lower proportion than the 78% who did so in 2018/19. This is in contrast to the UK-wide picture, where there has been a decrease in the proportion of workers holding a qualification, from 72% in 2018/19 to 69% in the latest survey.

As in previous years, the qualifications most likely to be held by construction workers in the North West (based on those with qualifications who provided a response) are NVQ/SVQ qualifications (66%), which is higher than in 2018/19 (61%). Nearly a quarter (23%) construction workers with qualifications hold City & Guilds qualifications (compared to 12%

in 2018/19 but 22% in 2015), whilst 13% hold an apprenticeship, an uplift on the 2% who did in 2018/19 but lower than in 2015 (17%). Fewer than one in twenty (4%) construction workers with qualifications hold an HNC/HND/BTEC Higher, and a similar proportion hold a Construction Award or a degree (both 4%), although the proportion holding a degree has declined since 2018/19 (9%), which represented a peak.

Current study for qualifications

Overall, 7% of all construction workers in the North West are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This is lower than the UK average (13%), and compares with 18% in 2018/19 and 14% in 2015.

Just 3% of those who have no qualifications are working towards one, as compared to 16% in 2018/19, and the UK average of 11%.

Supervisory/managerial training

Amongst those who do not currently perform supervisory/management roles and have not had this role before, 12% want to become a supervisor or manager in the future, fewer than the 27% who did so in 2018/19, but 7% previously held the role and want to return to that status (higher than the 3% reported in 2018/19). More than three in five (63%) are certain that they do not want to, and one in six (18%) are unsure. Compared with the UK average, workers in the North West are not as keen to take on the role of supervisor/manager.

Three in ten construction workers in the North West (29%) have received formal training designed to improve managerial or supervisory knowledge or skills, down on the 39% who had in 2018/19, and somewhat lower than the UK average of 33%. Among those who have or have had some form of supervisory or management responsibilities, more than four in five (85%) have received formal training, in line with 2018/19 (83%) and the UK average (80%).

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned by those who have undertaken any training (55%), followed by Site Safety Supervisors Courses (28%) and in-house training (26%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

Basic skill needs

Overall, 8% of construction workers in the North West believe they would benefit from some form of training in basic skills (compared to 6% in 2018/19, 10% in 2015 and 17% in 2012). This is a similar proportion to the UK average (19%), which has seen an increase since 2018/19 (11%).

Overall skill levels

As in previous years, the vast majority (94%) of construction workers in the North West have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 6% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

The proportion of construction workers in the North West who hold a skill card/certificate, but has no other construction qualification is similar to 2018/19 (18% compared to 17%).

At 7%, the proportion of construction workers who are working towards a construction qualification is lower than in 2018/19 (18%) and 2015 (14%), as well as the UK average (13%).

Overall, nearly two in three (63%) of construction workers in the North West have qualifications equivalent to Level 2 or above, a slight decrease on the 67% who did in 2018/19 and 2015. It is similar to the UK average of 61%.

Geographic mobility

Work history in the region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. In the North West, compared with in 2018/19, and the UK average this year, workers are more likely to say it was because their employer sent them there (68%, compared to 46% in 2018/19 and the UK average of 47%), with fewer than in 2018/19 saying it was because they grew up there/have always lived there (43%, compared to 60% in 2018/19), but this year North West workers are in line with the UK average of 46%.

Approaching half (46%) of construction workers in the North West have worked within their current region for their whole career, returning this to the levels seen in 2015 (48%) following an increase in 2018/19 (55%). It is in line with the UK average (49%). A similar proportion again (44%) have worked in their current region for most of their career, meaning that 90% have remained in the North West for all or most of their career, in line with previous years (88% in 2018/19 and 91% in 2015), but which is higher than the UK average (83%).

Similarly to 2018/19 and 2015, construction workers in the North West are among the most likely to state that their last site was in the same region (87%), but the proportion is slightly lower than in 2018/19 (91%) and 2015 (89%).

Worker origins

Also similarly to 2018/19 and 2015, construction workers in the North West are among the most likely to be interviewed in the same region/nation in which they were living when they

started their construction career (89%), and this proportion is much in line with 2018/19 (87%) and 2015 (91%).

Travel to site

Over a third (35%) of construction workers in the North West have worked no more than 20 miles away, continuing an upward trend since 2015 (12%) and 2018/19 (29%), and similar to the UK average of 33% in 2022. A further third (36%) have worked between 21 and 50 miles away, in line with 2018/19 (33%) and 2015 (35%), and with the UK average of 33%.

This leaves just over a quarter (28%) who have worked more than 50 miles away from their permanent or current home, including 10% who have worked more than 100 miles away. This compares to 38% and 14% respectively in 2018/19, so there has been a reduction in the proportion who have travelled over 50 miles.

Compared with workers in other regions/nations, workers based in the North West are among the least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (both 12%). The average furthest distance travelled is 43 miles in the North West, broadly in line with the UK average of 46 miles.

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 16 miles, and the overall trend since 2012 is downward (13 miles in 2018/19, 21 miles in 2015 and 33 miles in 2012).

This downward trend is also reflected in the national picture, where the average distance is 17 miles, down on 18 miles in 2018/19, 22 miles in 2015 and 28 miles in 2012.

Half (50%) of those providing a response travel less than 10 miles to work, similar to the 46% who did so in 2018/19, more than two in five (46%) travel between 10 and 49 miles (compared to 53% in 2018/19), and the remaining 4% travel further than this (compared to 1% in 2018/19).

Use of temporary accommodation

Both nationally and in the North West, around one in twenty (3%, 5% across the UK) construction workers reported that they were currently staying in temporary accommodation while working at their site, in line with previous years (3% in 2018/19, and 2% in 2015 and 2012).

Site duration and change

When workers who are currently employed on a temporary basis (29% of all construction workers in the North West) were asked how much longer they expect to be working for the company/person/agency paying them, two-fifths (41%) did not know how much longer they expected to be working, significantly higher than 2018/19 (13%), and also higher than the 2022 UK average (32%). Responses ranged from 4% who expected to work for another

week, 6% expecting another two to four weeks, a quarter (27%) for one to six months, a fifth (19%) six to twelve months, and just 1% more than a year.

Overall, 7% of all construction workers in the North West, whether temporary or permanent, do not expect to work on that site for more than a month, fewer than in 2018/19 (13%). Just 1% believe they will be there for less than a week (compared to 4% in 2018/19). More than half (54%) anticipate being on site for more than a month but less than a year, similar to 2018/19 (53%) and the UK average in 2022 (53%). One in ten (10%) expect to be on site for more than a year, at lower levels than previously (22% in 2018/19, 23% in 2015). This compares with UK average of 13%.

Three in ten (30%) are uncertain in this regard, somewhat higher than 2018/19 (13%), and the UK average of 22%.

While a majority (60%) of all construction workers in the North West are confident that when they finish this job, they will get a job that allows them to travel from their permanent home to work on a daily basis, this continues a decline on this measure since 2015 (86% in 2018/19 and 79% in 2015). This year, in the North West, it is lower than the national average of 69%.

The proportion who are sure that this will not be the case has remained stable (5% compared to 3% in 2018/19), while the proportion who say it depends where the work is has increased, from 8% in 2018/19 to 31% in the latest survey, as is the case across the UK overall (from 8% in 2018/19 to 20% in 2022).

Sub-sector and sector mobility

Sub-sector mobility

New housing continues to be the most common type of construction work undertaken (82%, compared to 88%), followed by housing repair and maintenance (45%, compared to 49%), commercial work (39%, compared to 47%), private industrial work (29%, compared to 41%), and public non-housing work (28%, compared to 48%).

However, there has been a decrease in the proportion of construction workers in the North West who have worked on infrastructure projects, from 26% in 2018/19 to 13% in the latest survey, the lowest proportion since the survey began in 2007. This is also lower than the UK average of 23%, which has also seen a decline since 2018/19 from 31%.

In terms of the number of types of work undertaken, the results are in line with the UK average, compared with 2018/19, workers in the North West are more likely to have undertaken just one type of work - 41%, compared with 28% and less likely to have undertaken five or more (13% compares with 26% in 2018/19).

Leaving the sector

More than four-fifths (86%) of construction workers in the North West think it is likely that they will still want to do so, including 47% who say they definitely will be, and 24% who think it is very likely. This is higher than the UK average of 82%. Just 5% say it is unlikely that they will still want to work in construction in five years' time (compared with a UK average of 7%).

Introduction

Aims and objectives

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

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

The specific objectives of this research project are to:

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

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

This report discusses the findings within the North West region.

Method

The 2022 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2018/19. Overall, 3,005 interviews with construction workers in site-based roles across the UK were required, split between the 12 standard regions/nations. In total, 271 interviews were conducted in the North West.

Sampling

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

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

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

Project eligibility criteria were:

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

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

Telephone-based site recruitment

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

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

Site visits

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

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

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

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

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

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

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

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

Methodological points to note

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

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

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

Notes on reading this report

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

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

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

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

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

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

Profile of construction site workers

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

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

Personal demographics

Figures 2 to 5 detail the demographic profile (gender, age, ethnicity, nationality and disability) of the 2022 sample of construction workers, compared with the 2018/19, 2015 and 2012 surveys and official statistics from the Annual Population Survey (where comparisons are possible).

Gender

As in previous years of the survey, the vast majority of construction workers in manual roles interviewed in the North West were male (96%), in line with the UK average. Male dominance is greater in the survey sample than in the UK construction workforce as a whole as this survey does not include those in office-based roles within the construction industry (either administrative or professional, where the incidence of female workers is higher) and interviews were conducted on relatively large construction sites (valued at £250,000+, with at least 10 workers), thereby excluding female construction workers on small building sites and in maintenance and repair (an industry segment in which women, for example in some small all-female businesses, may be slightly more frequent). More detail is shown in the following figure.

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

Base: All respondents

	NW 2022 %	UK 2022 %	UK Workforce* %
Male	96	97	52
Female	1	2	48
Transgender	0	<0.5	-
Non-binary	1	<0.5	-
Prefer not to say	2	<0.5	-
<i>Unweighted bases</i>	<i>271</i>	<i>3,005</i>	<i>33,808,600</i>

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

Age

Within the North West, the youngest age group (16 to 24 year olds) accounts for one in six construction workers (16%), a directional decrease on previous iterations of the survey (20% in 2012, 19% in 2015, 17% in 2018/19), but while a smaller proportion than the survey data for the UK overall in 2022 (19%) it is a higher proportion than across the UK workforce overall (13%).

Just over half of construction workers in the North West are aged 25 to 44 (52%), which is in line with 2018/19 (51%). This fluctuated prior to 2018/19, with fewer workers in 2015 aged 25 to 44 (47%), and more in 2012 in this age group (54%). Overall, the 2022 proportion is lower than the UK workforce overall (56%).

Those aged 45 to 59 account for 22% of construction workers in the region, lower than in 2018/19 and 2015 (31% in both years), but similar to 2012 (25% were 45+ then. The proportion of workers in this age group is slightly lower in the North West than the UK average (25%) and lower than the 28% in the UK workforce overall.

Close to one in ten (8%) are aged 60 or over, a higher proportion than in previous years in the North West (3% in 2018/19, 2015 and 2012), and largely in line with the UK survey average (6%) but higher than within the UK workforce overall (4%).

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

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %		UK Workforce* %
16 to 19 years	3	6	7	5	6	16 to 19 years	4
20 to 24 years	13	11	12	15	13	20 to 24 years	9
25 to 34 years	27	32	26	28	26	25 to 34 years	23
35 to 44 years	25	19	21	26	24	35 to 49 years	33
45 to 54 years	17	20	24	17	17	50 to 64 years	28
55 to 59 years	5	11	7	8	8		
60+ years	8	3	3		6	65+ years	4
<i>Unweighted bases</i>	271	282	435	442	3,005		33,808,600

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

Ethnicity

In terms of ethnicity, the vast majority of construction workers in the North West continue to be of White origin (97% compared to 97% in 2018/19, 98% in 2015 and 98% in 2012).

On this basis, 1% are of Black, Asian or Mixed origin, lower than the UK working age population (12%).

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

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %	UK population aged 16 to 64* %
White	97	97	98	98	91	84
Black	1	<0.5	<0.5	1	2	4
Asian	0	1	<0.5	1	2	6
Mixed	<0.5	1	-	-	1	2
Other/Not stated	1	<0.5	1	1	3	4
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>442</i>	<i>3,005</i>	<i>41,439,500</i>

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

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

While at 1%, the proportion of North West construction workers of ethnic minority origin is the lowest alongside Northern Ireland (also 1%), and well below the UK survey average of 7%, the proportion of the working age population in this region that represent an ethnic minority group is similar to the UK working age population average (13%).

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

Base: All respondents

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

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

Country of origin

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

As was the case in 2018/19, the majority of construction workers in the North West (96%, compared to 97% in 2018/19) originated from the UK and the remaining 4% originated from another country, 2% from within the EU, and 2% from outside the EU (the latter including workers from Bulgaria, Poland and Nigeria).

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

Base: All respondents

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

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

Holding of passports

Fewer than one in twenty (3%) of construction workers in the North West hold a passport for another country, which compares with 4% in 2018/19, and with a UK average of 13%. The majority hold a UK passport (86%), with a further 9% reporting that they do not have a passport.

Length of time living in the UK

In line with 2018/19, the majority of North West construction workers have lived in the UK all of their life (93% compared to 91% in 2018/19). Again, as was the case in 2018/19, this is significantly higher than the UK average of 80%. Less than 1% have lived in the UK less than five years.

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

Base: All respondents

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

Q39

Disability

Amongst all construction workers in the North West, 1% cent report that they have a long-term illness, health problem, or disability which limits the type of work they can do (as compared to 3% in 2018/19). The proportion this year is lower than the UK survey average of 3%.

Occupational profile

Current job role

All workers were asked what their current trade or occupation is at their site. Respondents in a supervisory role were asked to detail their trade/occupation background, as their supervisory roles would be asked about later in the survey. Figure 8 summarises all the

trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from the 2018/19 and 2015 surveys.

As in 2018/19, labourers/general operatives account for the highest proportion of construction workers in the North West, (24%, compared to 18% in 2018/19 and 15% in 2015), higher than the UK average (18%). While there are fewer site managers in 2022 compared with 2018/19 (10%, compared to 17%), and fewer bricklayers in 2022 compared with 2015 (13%, compared to 17%).

Bricklayers, site managers and plant/machine operatives each account for around one in ten construction workers (13%, 10% and 10% respectively), as do site managers and plant/machine operatives (8% in both instances). These are largely in line with the UK average.

Figure 8: Occupational profile

Base: All respondents. Mentions 1%+

	NW 2022 %	NW 2018/19 %	NW 2015 %	UK 2022 %
Labourer/General operative	24	18	15	18
Bricklayer	13	10	17	10
Site manager	10	17	8	9
Plant/machine operative (e.g. Fork lift/JCB)	10	8	9	9
Carpenter/joiner	8	11	15	9
Ground worker	6	3	5	5
Floorer	3	1	-	1
Electrician	3	3	5	5
Scaffolder	3	3	3	3
Plumber	2	3	5	3
Technical e.g. surveyor, maintenance technician	2	6	1	3
Roofer	2	<0.5	-	3
Dryliner	1	2	2	3
Supervisor/foreman	1	2	1	2
Pipe fitter	1	2	1	1
Ceiling fixer	1	<0.5	-	1
Banksman/Banksperson	1	2	2	2
Steel erector/rigger	1	1	-	2
Plasterer	1	1	4	1
Project Manager	1	2	-	1
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>3,005</i>

Q5

Supervisory roles

Around a fifth (22%) of all construction workers in the North West say they perform a supervisory or management role on their site (compared to 37% in 2018/19 and 25% in 2015). Thus, in the North West, this proportion has significantly decreased over time, and it is a lower proportion than the UK average in 2022 (28%).

As was the case previously, the incidence of workers in a supervisory role increases with age, from 9% of 16 to 24 year olds to 38% of those aged 45+

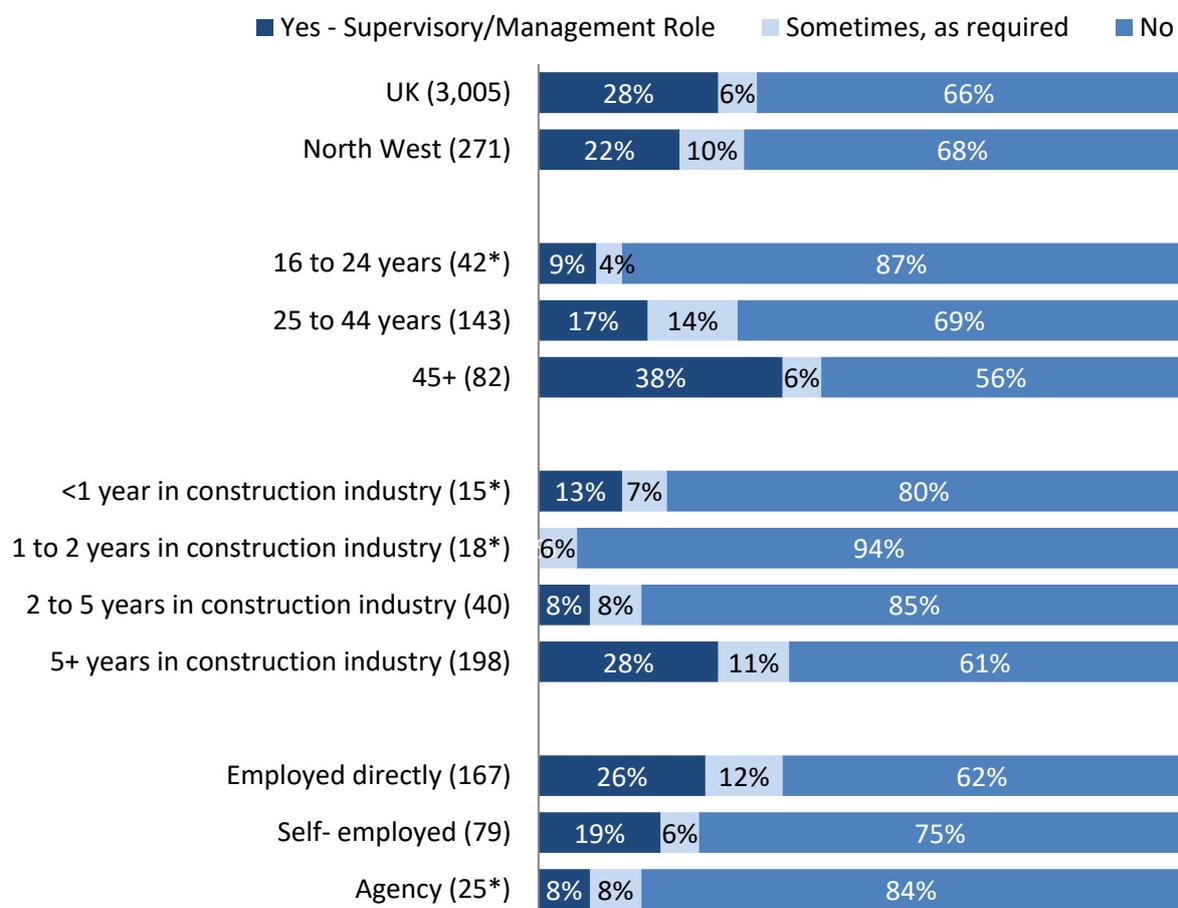
Similarly, a higher proportion of those who have worked in the construction industry for more than 5 years have supervisory roles than those that have worked in the industry for less than 5 years (28%, compared to just 7% of those who have worked in the industry for less than five years).

As would be expected, workers who are directly employed by a company continue to be more likely than those who are self-employed or work for an agency to perform a supervisory role (26% compared to 19% and 8% respectively).

These differences are summarised in the following figure.

Figure 9: Whether respondents perform a supervisory or management role

Base: All respondents



Q8. Unweighted bases in parentheses * Caution: low base

Employment status

Three in ten construction workers in the North West (29%) are self-employed, somewhat down on 2018/19 (39%) and 2015 (40%), and lower than the national average of 42%.

There has been a corresponding increase in the proportion who report being directly employed, from 56% to 62%, and this remains above the national average of 48%.

Around one in ten (9%) report working for an employment agency, higher than in 2018/19 (4%) but similar to the UK average in 2022 (9%).

Workers who have worked in the industry for more than five years are more likely to be self-employed than those who have worked in it for less than five years (33%, compared to 18%).

The proportion who work for an agency is highest among those who have worked in the sector for 1 to 2 years (17%).

Figure 10: Employment status

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	UK 2022 %	Years working in construction %			
					<1	1-2	2-5	5+
Employed directly by a company (contractor or sub-contractor)	62	56	57	48	73	67	75	58
Self-employed	29	39	40	42	27	17	15	33
Working for an employment agency	9	4	4	9	0	17	10	9
Working on some other basis	0	1	0	1	-	-	-	-
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>3,005</i>	<i>15*</i>	<i>18*</i>	<i>40*</i>	<i>198</i>

Q20

* Caution: low base

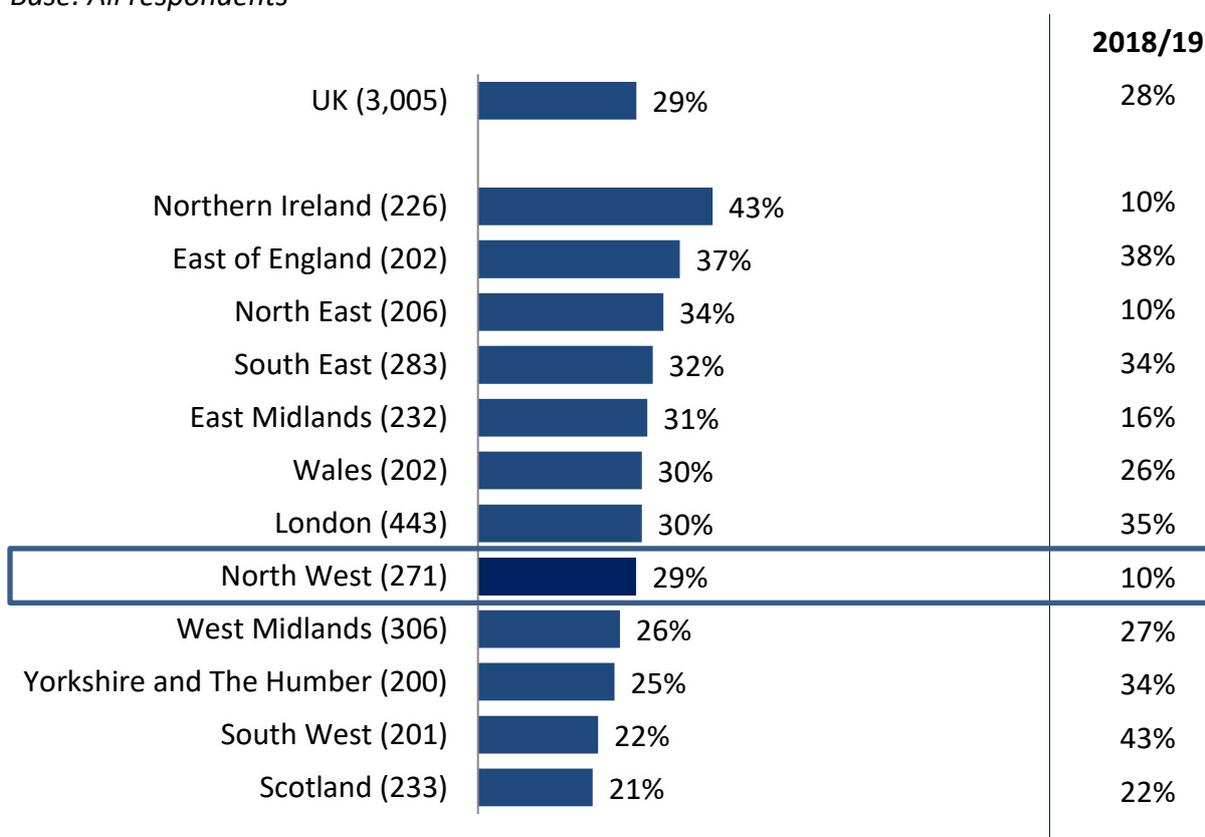
Employment contract basis

Three in ten construction workers in the North West are employed on a temporary, rather than a permanent basis (29%; 70% employed on a permanent basis). This represents a significant increase on temporary employment in the region compared with 2018/19 (10% and 90% respectively). The remainder believe they have an ‘other’ type of contract arrangement (1%).

The North West is in line with the UK average of 29% with regard to the profile of its construction workforce in terms of temporary employment contracts held.

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

Base: All respondents



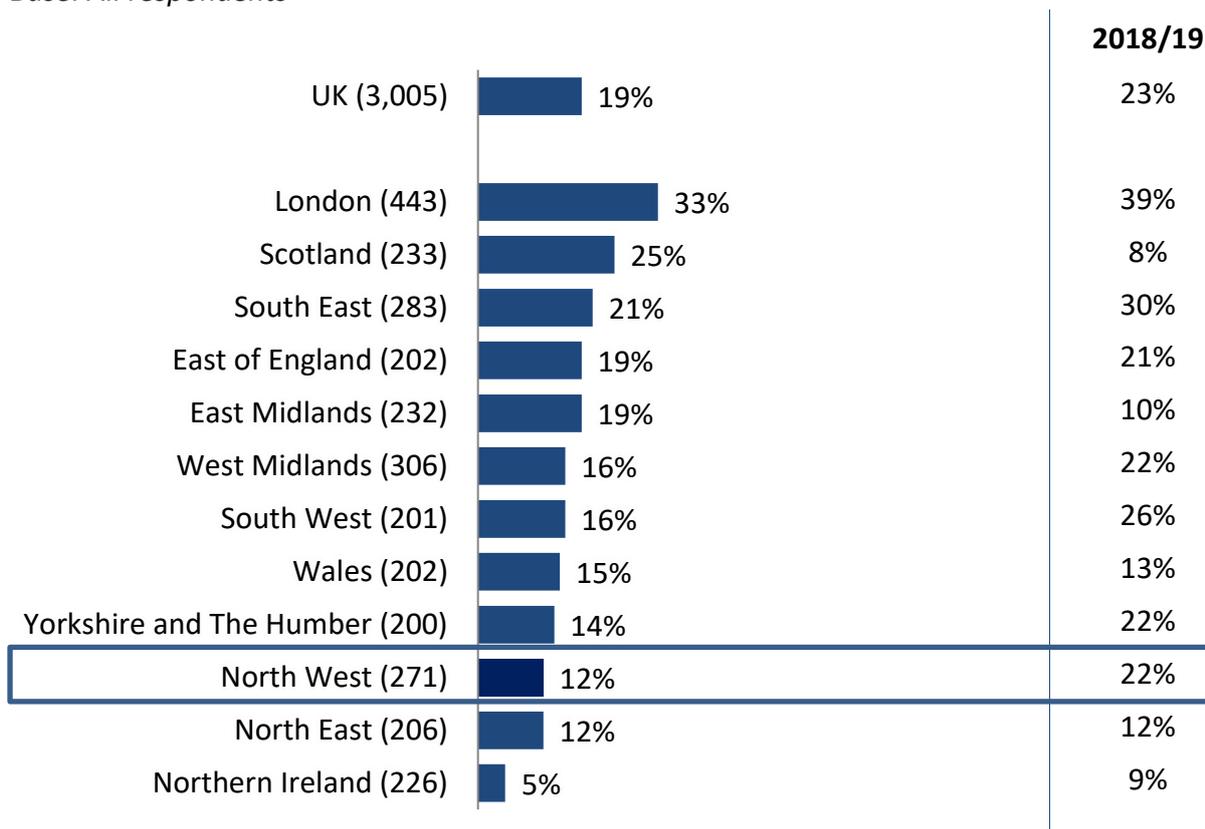
Q21. Unweighted bases in parentheses

Hours worked

Construction workers in the North West, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (67%, compared with a UK average of 59%), while 12% work more than 50 hours a week, down on 2018/19 (22%), and lower than the UK average of 19%.

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

Base: All respondents



Q22. Unweighted bases in parentheses

Work histories

Time in the sector

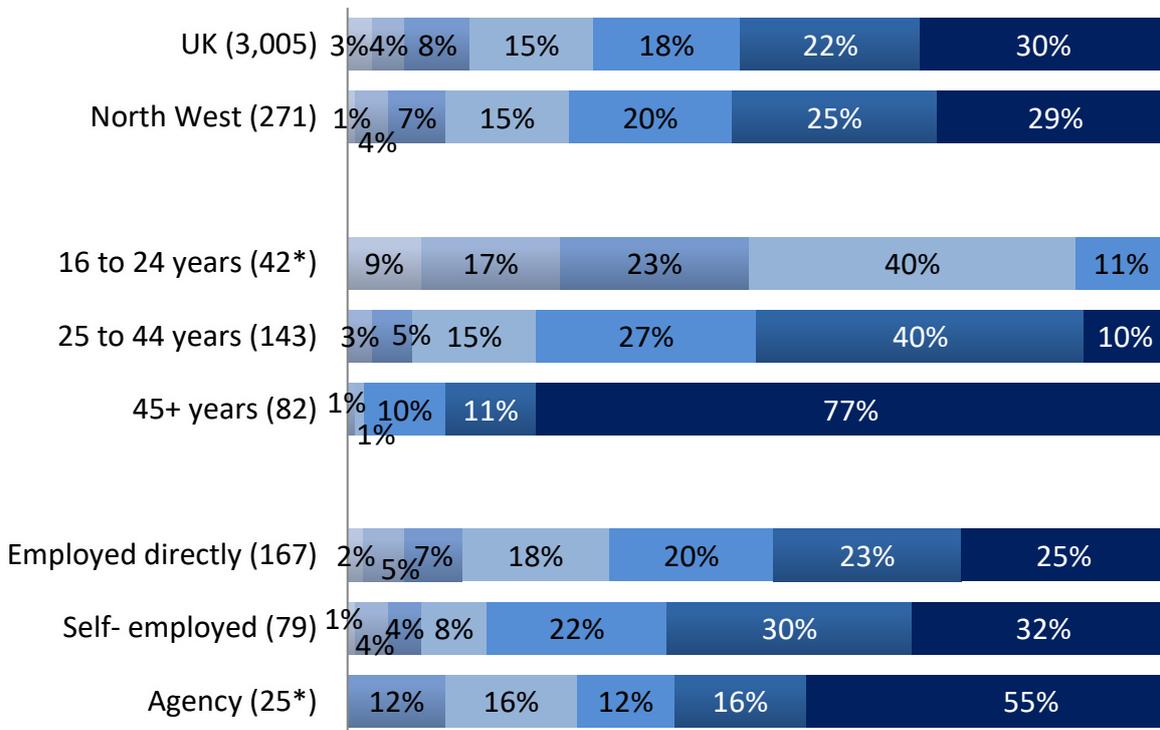
Three in ten (29%) of all construction workers in the North West have worked in the construction industry for over 20 years, broadly in line with 2018/19 (33%), and the UK average (30%). More than half (54%) have worked in the industry for at least 10 years, fewer than in 2018/19 (61%).

As expected, the length of experience in the industry increases with age, with three-quarters of all construction workers aged 45 and over having more than 20 years' experience of working in the sector (77%, compared to 80% in 2018/19).

Figure 13: Years spent working in the construction sector

Base: All respondents

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



Q1. Unweighted bases in parentheses

* Caution: low base

Figure 14 shows an increase in the proportion working in the sector for up to five years since 2015 from 21% in 2015, to 29% in 2018/19, and to 27% in the latest survey.

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

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	UK 2022 %
Less than 6 months	1	3	4	3
Up to a year	5	5	6	7
Up to 2 years	12	11	12	14
Up to 5 years	27	29	21	29
Up to 10 years	47	39	35	48
Up to 20 years	72	67	60	70
More than 20 years	29	33	40	30
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>3,005</i>

Q1

Pre-construction employment histories

There has been an increase in the proportion of North West construction workers who have worked pretty much continuously in the industry since 2015, from 60% in 2015, and a decrease in 2018/19 to 49% to 66% in the latest survey, placing the North West above the UK average in this respect in 2022 (61%). Consequently, the proportion who have only ever worked in construction has also increased, from 65% in 2015, dropping to 53% in 2018/19 and increasing again to 76% in the latest survey.

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

All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	UK 2022 %	Age %		
					16 - 24	25 - 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	66	49	60	61	45	66	80
I have only worked in construction jobs but have had spells of being out of work	6	4	5	6	4	8	4
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	9	8	5	8	11	11	4
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	12	25	12	18	13	11	11
This is my first job. I haven't worked in any other industry.	4	9	13	4	17	1	1
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	3	5	4	4	4	3	0
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>3,005</i>	<i>42*</i>	<i>142</i>	<i>82</i>

Q2

* Caution: low base

Overall, 12% of construction workers in the North West 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. This is as reported in 2015 (12%) but is half that of the proportion reported in 2018/19 (25%), and is lower than the UK average of 18%.

Those who had worked in other sectors before starting their construction careers were asked to give details of what they were doing immediately before they started working in construction. Base sizes are low, so caution should be shown with regard to the results, but the most common sectors in which construction workers in the North West had started their careers were manufacturing (28%), wholesale and retail trade (21%) and transportation and storage (13%). The pattern of response largely reflects that in the UK.

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

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

	NW 2022 %	NW 2018/19 %	NW 2015 %	UK 2022 %
C – Manufacturing	28	61	13	20
G – Wholesale and retail trade; repair of motor vehicles and motorcycles	21	17	23	22
H – Transportation and storage	13	3	20	10
O – Public admin and defence	5	0	0	5
I – Accommodation	5	4	8	10
<i>Unweighted bases</i>	39	71	71	624

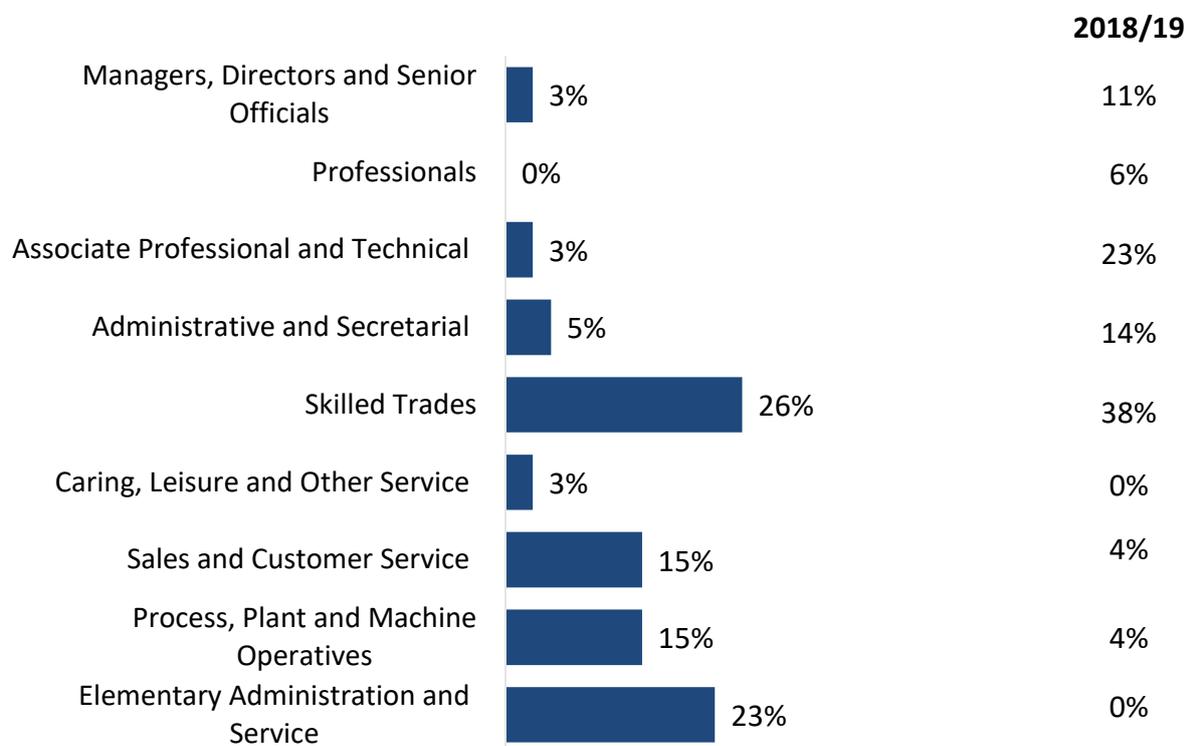
Q3

* *Caution: low base*

In terms of the job roles that respondents have held in other sectors, the highest proportions were in skilled trades occupations (26%), elementary administration and service occupations (23%), process, plant and machine operatives and sales and customer services occupations (both 15%).

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

Base: Where first job was not in construction



Q3. Unweighted base (39)

Occupational switching and progression within construction

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

Overall, a third (33%) of all construction workers in the North West have worked in more than one construction trade or occupation whilst working in the construction industry, a lower proportion than in 2018/19 (39%) but similar to 2015 (31%), and the UK average in 2022 (35%).

Naturally, the proportion of workers who have had more than one role increases with age, from 15% of those aged under 25 to 39% of those aged 45 or over, and with the length of time respondents have worked in construction, from 20% of those with up to a year's experience to 37% amongst those with 5 or more years of experience.

Underlining the greater propensity for construction workers in a supervisory role to have worked in more than one construction trade or occupation, site managers are significantly more likely than average to have done so (50%), as are plant/machine operatives (54%).

Figure 18: Percentages having had other construction roles by current occupation

Base: All respondents

MORE likely to have had more than one role (average 34% in 2022)			LESS likely to have had more than one role (average 34% in 2022)		
	NW 2022 %	UK 2022 %		NW 2022 %	UK 2022 %
Site manager (26*)	50	56	Bricklayer (34*)	24	26
			Carpenter/joiner (23*)	30	22
Plant / Mach. Op. (26*)	54	48	Labourer/General operative (66)	20	28
<i>Unweighted bases for 2022 North West in parentheses</i>					

Q6

* Caution: low base

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

Amongst the 33% of all North West construction workers that had worked in at least one other role/occupation, 20% had worked in 1 previous role, 43% had worked in 2 previous roles, 31% had worked in 3 roles/occupations and 6% had worked in 4 roles/occupations.

Workers are most likely to have previously worked as a labourer/general operative (47%), while 12% (in each case) had previously worked as a carpenter/joiner, bricklayer and/or floorer. This is in line with the UK average.

Figure 19: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	NW 2022 %	UK 2022 %
Labourer/General operative	47	39
Carpenter/joiner	12	15
Bricklayer	12	12
Floorer	12	4
Site manager	9	4
Banksman/Banksperson	8	7
Plant/machine operative (e.g. Fork lift/JCB)	4	10
Plasterer	4	5
Painter/decorator	4	4
Dryliner	2	5
Ceiling fixer	2	3
Electrician	2	2
Steel erector/rigger	2	2
Mechanical fitter	2	2
Roofer	1	4
Plumber	1	3
Pipe fitter	1	2
Technical e.g. surveyor, maintenance technician	1	2
Insulation specialist	1	2
Other	11	10
<i>Unweighted base</i>	<i>90</i>	<i>1,082</i>

Q7

Future career plans

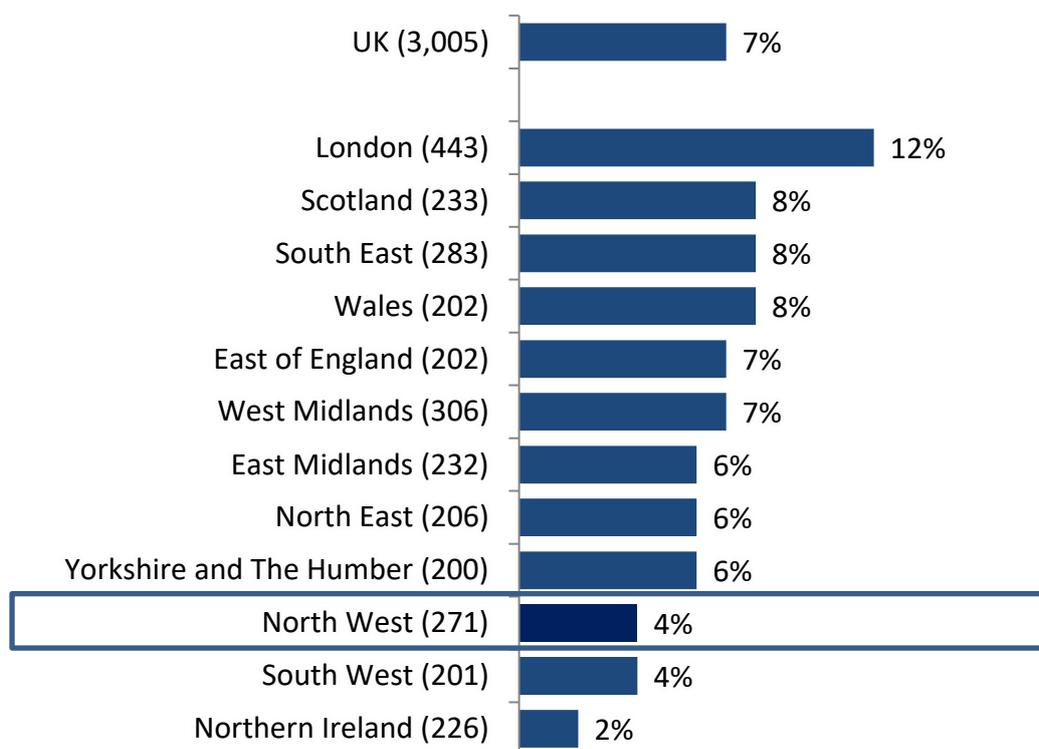
The vast majority of construction workers in the North West (86%) would like to carry on in the same trade or occupation, a higher proportion than in 2018/19 (76%) and higher than the 2022 UK average of 80%.

Around one in twenty (4%) would like to change their trade/occupation, which is significantly lower than 2018/19 (16%), when workers in the North West were the most likely across the UK to want to change their trade or occupation, and lower than the 2022 UK average (7%). The remainder would like to leave construction (4%) or were unsure (6%).

Agency workers are less likely than average to want to carry on working in the same trade or occupation (76%).

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

Base: All respondents



Q33. Unweighted bases in parentheses

Qualifications and skills

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

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

Construction skill cards and certificates

While over nine in ten (91%) of all construction workers in the North West report holding a skill card or certificate (e.g. CSCS or CSR), this is a reduction on the 97% to 98% who did so in previous surveys. While this reflects the UK picture, which has seen a similar decline (from 97% to 93%), the decrease in the North West, along with the West Midlands and Scotland, is the most marked, such that having had the highest levels of card-holding in 2018/19, they now have among the lowest levels of card-holding.

Correspondingly, the proportion who have no cards has risen from 2% in 2018/19, to 8% in 2022.

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

Base: All respondents

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

Q12

In terms of the type of skill card or certificate held by construction workers in the North West, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (81%), but to a lesser extent than 2018/19 (89%) and 2015 (90%).

Over one in eight (13%) hold the CPCS (Construction Plant Competence Scheme), in line with 2018/19 (12%), and 4% hold the CISRS (Construction Industry Scaffolders Record Scheme) or the CSR (Construction Skills Register)(NI).

Figure 22: Type of skill card/certificate held

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %
CSCS (Construction Skills Certification Scheme) (GB)	81	89	90
CSR (Construction Skills Register) (NI)	4	1	<0.5
CISRS (Construction Industry Scaffolders Record Scheme)	4	2	3
CPCS (Construction Plant Competence Scheme)	13	12	13
Other	5	2	4
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>

Q12

Construction workers in the North West who are self-employed or work via an agency are more likely to hold cards (97% and 96% respectively, compared with 87% of those directly employed). Those who have worked in the industry for more than 5 years are particularly likely to hold at least one (95%).

Workers who hold a CSCS card were asked what colour their cards are. Overall, within the North West, 7% of CSCS card holders have Red – experienced worker cards, three in ten (30%) have Green cards and one in three (32%) have Blue cards (up on the 27% who did so in 2018/19). Over one in seven (15%) have Gold cards, with other types of card held by more than around 5%.

Figure 23: Colour of CSCS card held

Base: Where CSCS card is held

	NW 2022 %	NW 2018/19 %
Red – Trainee	3	3
Red – Experienced worker card	7	2
Green – construction site operative card for general site workers	30	33
Blue – skilled	32	27
Gold – supervisor card	9	29
Gold – Advanced craft/skilled worker	6	6
Black – contracts manager card	6	13
Academically Qualified Persons Card	2	8
Professionally Qualified Persons Card	<0.5	5
Provisional Card	<0.5	0
Apprentice Card	<0.5	1
Other	1	1
Unsure	3	3
<i>Unweighted bases</i>	<i>220</i>	<i>250</i>

Q13

Card colours vary significantly according to current occupation/trade. Labourers/general operatives are more likely than average to hold Green cards (61%), while bricklayers (52%) and carpenters/joiners (35%) are more likely than average to hold Blue cards and site managers, Gold cards (39%).

Figure 24: Colour of CSCS card held, by current occupation*Base: All respondents*

<i>Row percentages</i>	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold: Advanced craft%	Gold: Supervisors card %	Black %
Bricklayer (33*)	0	0	6	52	18	12	0
Carpenter/joiner (20*)	5	10	15	35	15	15	5
Labourer/general operative (46*)	4	20	61	13	0	2	0
Site manager (23*)	4	0	4	4	4	35	39
<i>Unweighted bases in parentheses</i>							

Q13

* Caution: low base

Construction qualifications held

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

Overall, more than two-fifths of construction workers in the North West (42%) report having no construction-related qualifications when they started their first job. This is lower than the 68% who reported this in 2018/19, and the 67% who did so in 2015, and lower than the 2022 UK average of 47%.

Those directly employed (54%) and in permanent positions (48%) are more likely than average to report having no qualifications. More than half of labours/general operatives do not have qualifications (54%).

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

Overall, nearly three quarters (72%) of construction workers in the North West report holding a construction-related qualification, fewer than the 78% who did so in 2018/19. This is a similar trend to the UK-wide picture, where the proportion of workers holding a qualification has fallen from 72% in 2018/19 to 69% in the latest survey.

There has been a decrease in the proportion of 20 to 24 year old workers that currently hold a construction-related qualification since 2018/19 of 11 percentage points, but an increase amongst 45+ year olds (2 percentage points).

Those who are self-employed (85%) and those who have been in the industry for over five years (77%) are more likely than average to hold a construction-related qualification.

Figure 25: Proportion of workers that hold any construction-specific qualification*Base: All respondents*

		NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %
Total (271)		72	78	71	70	69
Age	16 to 19 years (7*)	57	64	58	-	54
	20 to 24 years (35*)	69	62	71	58	64
	25 to 44 years (143)	71	76	75	53	72
	45+ years (82)	76	68	63	71	69
Length of time in construction	<1 year (29*)	40	35	32	25	46
	1 to 2 years (24*)	50	70	74	28	43
	2 to 5 years (50)	65	54	62	43	62
	5+ years (203)	77	76	73	66	75
Current contract type	Employed directly (167)	64	71	69	59	69
	Self-employed (79)	85	74	71	60	74
	Agency (25*)	80	44	71	50	50
<i>Unweighted bases for North West 2022 in parentheses</i>						

Q15/Q16

Type of construction qualifications held

Based on the qualifications that workers had when they first started working in the construction industry and any they have gained since, Figure 26 summarises the types of qualifications that workers hold and compares the figures to previous surveys (amongst those who have any qualifications and who provided a response).

As in previous years, the qualifications most likely to be held by construction workers in the North West are NVQ/SVQ qualifications (66%), which is higher than in 2018/19 (61%), when there was a dip compared with previous years (71% in 2015, 74% in 2012).

Nearly one in four (23%) construction workers with qualifications hold City & Guilds qualifications, compared to 12% in 2018/19, but to a similar proportion in 2015 (22%), whilst 13% hold an apprenticeship, an uplift on the 2% who did in 2018/19 and, again, back to the 2015 level (17%).

Around one in twenty (4%) construction workers with qualifications hold an HNC/HND/BTEC Higher, and a similar proportion hold a Construction Award or a degree (both 4%), although the proportion holding a degree has declined since 2018/19 (9%), which represented a peak.

Figure 26: Main type of qualification held

Base: Workers with qualifications (valid responses)

	NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %
NVQ/SVQ	66	61	71	74	69
City & Guilds	23	12	22	16	18
Construction Award	4	-	-	-	3
Apprenticeship	13	2	17	3	11
HNC/HND/BTEC Higher	4	7	6	1	5
Degree	4	9	1	0	5
Other	15	21	11	5	12
<i>Unweighted bases</i>	<i>238</i>	<i>183</i>	<i>272</i>	<i>205</i>	<i>2,093</i>

Q15/Q16

Additional formal training

Self-assessment of basic skills needs

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

Overall, 8% of construction workers in the North West believe they would benefit from some form of training in basic skills (compared to 6% in 2018/19, 10% in 2015 and 17% in 2012). This is a lower proportion than the 2022 UK average (19%), which has seen an increase since 2018/19 (11%).

In terms of the type of training required, there is a relatively even split across reading (4%), writing (3%), speaking English (3%), maths (2%) and digital skills (2%).

Figure 27: Self-assessed need for training in basic skills

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %
ANY	8	6	10	17	19
Reading	4	3	5	10	9
Writing	3	2	3	8	7
Speaking English	3	1	4	8	9
Maths	2	4	5	7	6
Digital skills	2	-	-	-	4
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>442</i>	<i>3,005</i>

Q37

Current study for additional construction qualifications

Overall, 7% of all construction workers in the North West are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This is lower than the UK average (13%), and compares with 18% in 2018/19 and 14% in 2015.

As in previous surveys, the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (29% of 16 to 19 year olds and 17% of 20 to 24 year olds).

There are no significant differences between workers employed directly, those who are self-employed and those working for an agency in this respect (8%, 6% and 4% respectively).

There are no real difference by qualification level, but it is notable that just 3% of those who have no qualifications are working towards one, as compared to 16% in 2018/19, and the UK average in 2022 of 11%.

Figure 28: Proportion working towards additional construction qualifications*Base: All respondents*

		NW 2022 %	NW 2018/19 %	NW 2015 %	UK 2022 %
Total (271)		7	18	14	13
Age	16 to 19 years (7*)	29	72	57	43
	20 to 24 years (35*)	17	27	23	24
	25 to 44 years (143)	6	8	10	11
	45+ years (82)	4	5	3	5
Length of time in construction	<1 year (15*)	13	52	36	28
	1 to 2 years (18*)	6	40	41	27
	2 to 5 years (40)	20	30	20	20
	5+ years (198)	4	7	8	8
Contract type	Employed directly (167)	8	18	20	15
	Self-employed (79)	6	6	6	10
	Agency (25*)	4	25	11	8
Highest qualification level	None (60*)	3	16	12	11
	Level 1 (24*)	13	42	50	17
	Level 2 (77)	6	14	10	12
	Level 3 (66)	5	5	11	11
	Level 4+ (27*)	15	24	11	16
<i>Unweighted bases for North West 2022 in parentheses</i>					

Q18

** Caution: low base*

Of the 24 construction workers in the North West² who are currently studying for a qualification (and who provided a response) around half (11, 47%) are studying for an NVQ/SVQ, while one or two in each case are currently studying for an apprenticeship, City & Guilds, a HNC/HND/BTEC Higher or Construction Award.

Supervisory and managerial qualifications and training

As reported earlier, around a fifth (22%) of construction workers in the North West perform a supervisory or management role at their site.

Amongst those who do not currently perform supervisory/management roles, 12% want to become a supervisor or manager in the future, fewer than the 27% who did so in 2018/19, and more than one in twenty (7%) previously held the role and want to return to that status (higher than the 3% reported in 2018/19). More than three in five (63%) are certain that they do not want to, and one in six (18%) are unsure.

Compared with the UK average, workers in the North West are not as keen to take on the role.

² Number of workers (unweighted)

By age, those aged 16 to 24 are most likely to want to be supervisors/managers (20%), while 74% of those aged 45 or over do not wish to, and this is reflected in the length of time in construction, where 68% of those in the industry for over five years do not want to take on this role in the future.

Figure 29: Whether those who are not currently supervisors want to be one in the future

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

		Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/ depends %
2022 UK (1,982)		17	6	59	18
2022 North West (184)		12	7	63	18
Age	16 to 24 years (36*)	18	2	50	30
	25 to 44 years (99)	11	7	63	19
	45+ years (46)	9	9	74	9
Length of time in construction	<1 year (12*)	8	0	58	33
	1 to 2 years (17*)	12	6	59	24
	2 to 5 years (34)	18	0	50	32
	5+ years (121)	11	9	68	12
Contract type	Employed directly (104)	12	3	60	26
	Self-employed (59)	15	12	64	8
	Agency (21)	5	10	76	10
<i>Unweighted bases in parentheses</i>					

Q9

* Caution: low base

Three in ten construction workers in the North West (29%) have received formal training designed to improve managerial or supervisory knowledge or skills, down on the 39% who had in 2018/19, and somewhat lower than the UK average of 33%. Among those who have or have had some form of supervisory or management responsibilities, the majority (85%) have received formal training, in line with 2018/19 (83%), and with the UK average (80%).

The proportion that has undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years than those that have worked in the sector for less time (34%, compared with 13% for those who have worked in the sector less than a year).

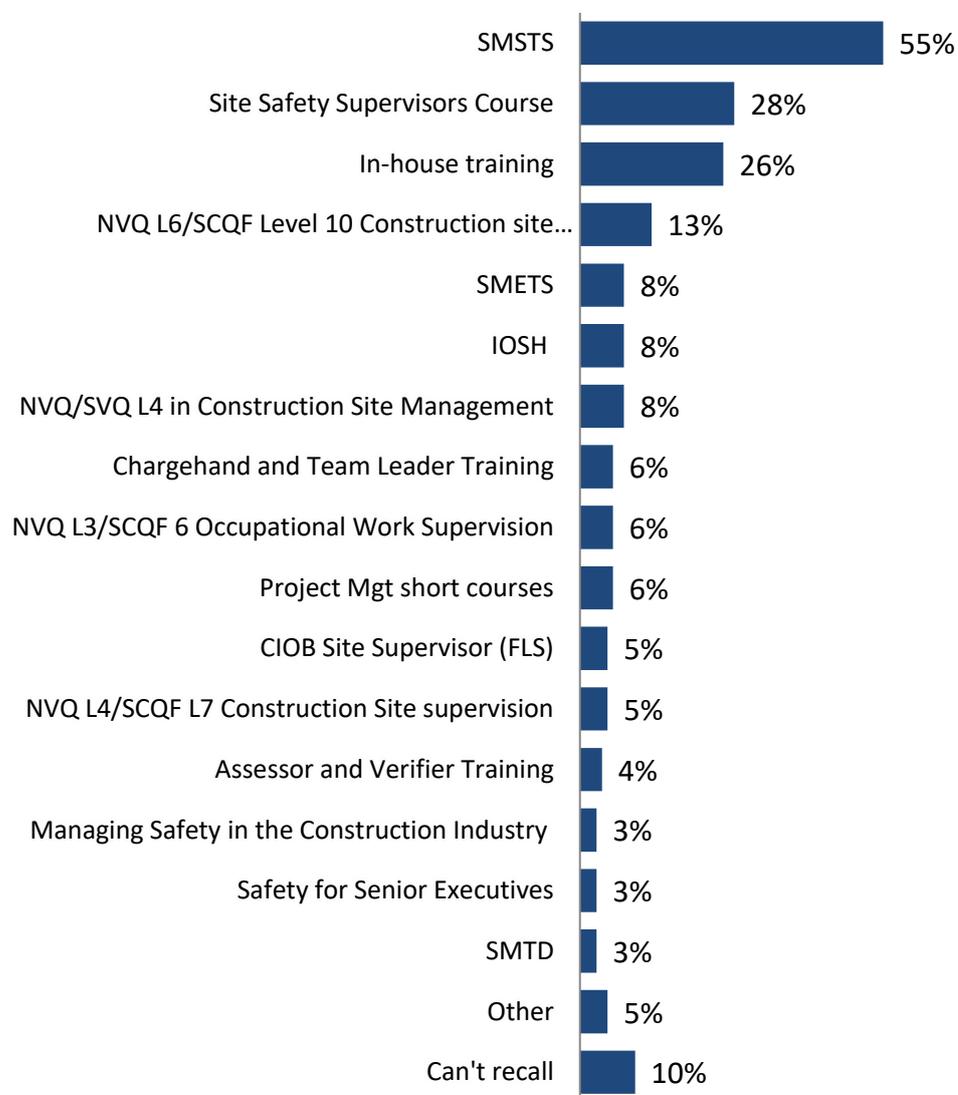
All site managers (100%) have received formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned by those who have undertaken any training (55%), followed by Site Safety Supervisors Courses (28%) and in-house training

(26%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

Figure 30: Types of managerial/supervisory training undertaken

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



Q11. Unweighted base = 78

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 31 below.

As in previous years, the vast majority (94%) of construction workers in the North West have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 6% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

One in six construction workers in the North West (18%) hold a skill card/certificate, but has no other construction qualification, which is similar to 2018/19 (17%), and this is not consistent with the downward trend that is evident across the UK.

At 7%, the proportion of construction workers who are working towards a construction qualification is lower than in 2018/19 (18%) and 2015 (14%) in the North West, and the 2022 UK average (13%).

Figure 31: Qualification status summary

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	94	99	99	99	96
Holds a formal construction qualification or a skills card/certificate	94	99	98	98	96
Holds a skills card/certificate	91	98	97	98	93
Holds a skills card/certification but no other qualification	18	17	25	52	19
Working towards a qualification	7	18	14	12	13
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>442</i>	<i>3,005</i>

Q12/Q15/Q16/Q18

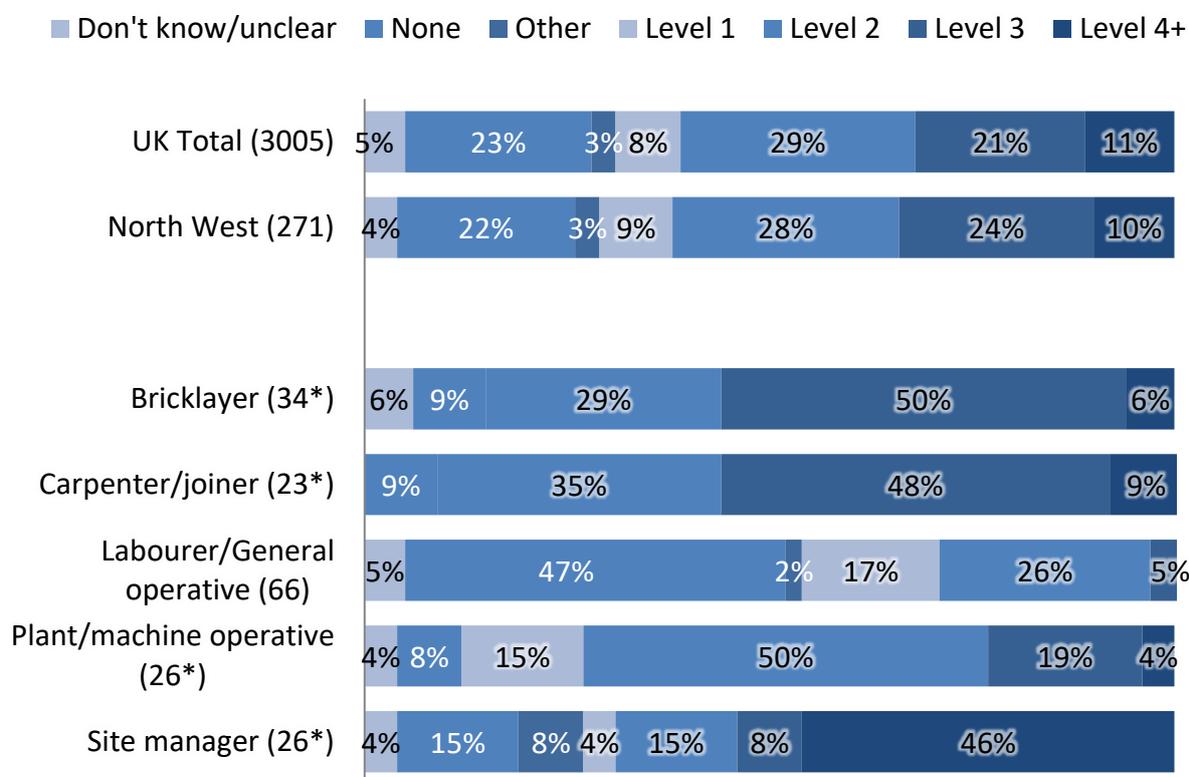
Based on all questions relating to qualifications it is possible to calculate each worker’s highest qualification level, and Figure 32 summarises construction workers’ highest level of qualification, overall and by occupation.

Overall, nearly two in three construction workers in the North West (63%) have qualifications equivalent to Level 2 or above, a slight decrease on the 67% who did in 2018/19 and 2015. It is slightly higher than the 2022 UK average of 61%.

By occupation, site managers are most likely to hold the highest level of qualifications (46% hold level 4 or above), while nearly half the general operatives/labourers (47%) have no qualifications, and just over two-fifths (43%) hold level 1 or level 2 qualifications.

Figure 32: Current qualification level, by occupation

Base: All respondents who provided a valid response



Q15/Q16. Unweighted bases in parentheses

* Caution: low base

Geographic mobility

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

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

Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in.

Compared with previous surveys, workers in the North West are much more likely to be working at their current location because their employer sent them there (68%, compared to 46% in 2018/19 and 24% in 2015). Having grown up there/always lived there has become secondary in importance to this (43% this year, compared to 60% in 2018/19 and 69% in 2015).

Figure 33: Reasons for choosing to work in current location – prompted, multiple response

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	UK 2022 %
Employer sent you here	68	46	24	47
You grew up here/have always lived here	43	60	69	46
Came to the area to take up this or another job	5	5	4	5
Family reasons	4	7	6	5
There are more jobs available in this area	2	3	8	3
Construction work is better paid in this area	1	1	2	4
There are more jobs available in this area	2	3	8	3
Better promotional prospects in this area	1	<0.5	0	1
<i>Unweighted bases</i>	271	282	435	3,005

Q28

Approaching half of construction workers in the North West (46%) have worked within their current region for their whole career, returning this to the levels seen in 2015 (48%) following an increase in 2018/19 (55%), and in line with the UK average this year (49%).

Almost as many again (44%) have worked in their current region for most of their career, meaning that 90% have remained in the North West for all or most of their career, in line with previous years (88% in 2018/19 and 91% in 2015), but higher than the 2022 UK average (83%).

Unsurprisingly the proportion of workers who have spent all or most of their time in the current region/nation reduces with age, from 96% of those aged 16 to 24 to 85% of those aged 45 or over.

Figure 34: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %
All of your time	46	55	48	30	49
Most of it	44	33	43	47	34
Around half your time	4	7	5	11	8
A small proportion of your time	4	4	4	7	5
Only on this job (this is the first site you've been to in this region/nation)	1	2	<0.5	2	1
Don't know	1	0	1	2	3
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>442</i>	<i>3,005</i>

Q26/Q27

In the North West, more than three-quarters of construction workers (78%) indicate their employer operates nationwide, with a fifth (19%) reporting that their employer operates in particular parts of the UK including the North West, while 3% are unsure.

Compared with the findings in 2018/19, workers are more likely to report their employer operating nationally (69% in 2018/19).

Region/nation worked in before current site

Thinking about the last construction site they worked on before their current one, in the majority of cases, workers' last sites are in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 35 illustrates.

Similarly to 2018/19 and 2015, construction workers in the North West are among the most likely to state that their last site was in the same region (87%), but the proportion is slightly lower than in 2018/19 (91%) and 2015 (89%).

Figure 35 Region/nation currently working in compared with the region/nation of workers' immediately previous construction sites

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

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

Q32

Worker origins

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

Construction workers in the North West are the most likely to be interviewed in the same region/nation in which they were living when they started their construction career (89%), and this proportion is much in line with 2018/19 (87%) and 2015 (91%).

Figure 36: Region/nation currently working in compared with workers' region/nation of residence prior to first starting work in construction

Base: All respondents *denotes less than 0.5%

Original home	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands (EM)	53	5	1	7	*	0	0	1	*	1	5	5
East of England (EE)	7	67	5	0	0	0	0	3	1	*	6	1
London (GL)	2	13	64	1	*	1	0	14	3	1	1	4
North East (NE)	2	3	*	67	3	0	1	1	*	*	*	0
North West (NW)	1	0	1	6	89	0	0	4	*	1	6	13
South East (SE)	3	7	10	*	*	0	0	64	3	*	2	1
South West (SW)	*	*	1	*	0	*	0	5	81	3	*	0
West Midlands (WM)	13	1	1	8	4	*	0	4	*	0	74	1
Yorkshire & Humber (YH)	15	2	1	8	2	*	0	0	0	0	2	75
Northern Ireland (NI)	1	0	*	0	0	92	0	*	0	0	0	0
Scotland (SC)	1	0	1	1	*	0	94	1	*	0	1	1
Wales (WA)	0	0	1	0	0	0	0	*	5	90	2	0
Republic of Ireland	*	0	*	0	*	4	2	*	0	0	*	0
Other parts of Europe	1	0	7	*	*	2	3	2	*	1	*	0
Outside of Europe	0	1	3	*	0	*	*	*	*	0	*	1
Other / Unsure	0.0 4	0	2	0	0	0	0	0	2	0	0	0
<i>Unweighted Bases</i>	232	202	443	206	271	226	233	283	201	202	306	200

Q40

Travel to site

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

The majority (87%) of construction workers in the North West were interviewed on a site that was located within the same region/nation as their permanent home, as was the case in 2018/19 (94%) and 2015 (88%). This is in line with the 2022 average across all regions of 85%.

Of the 12% who travel outside of their region to their current site, almost all (10%) are from a neighbouring region, as this is the pattern for most other regions.

Furthest distance worked in last 12 months

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

Over a third of construction workers in the North West (35%) have worked no more than 20 miles away, continuing an upward trend since 2015 (12%) and 2018/19 (29%), but it is similar to the 2022 UK average of 33%.

A further third (36%) have worked between 21 and 50 miles away, in line with 2018/19 (33%) and 2015 (35%), and with the 2022 UK average of 34%.

This leaves just over a quarter (28%) who have worked more than 50 miles away from their permanent or current home – which is lower than the UK average (32%), including 10% who have worked more than 100 miles away (12% across the UK). This compares to 38% and 14% respectively in 2018/19, so there has been a reduction in the proportion who have travelled over 50 miles (41% and 17% respectively in 2018/19 across the UK).

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

The average furthest distance travelled is 43 miles in the North West, in line with the UK average of 46 miles.

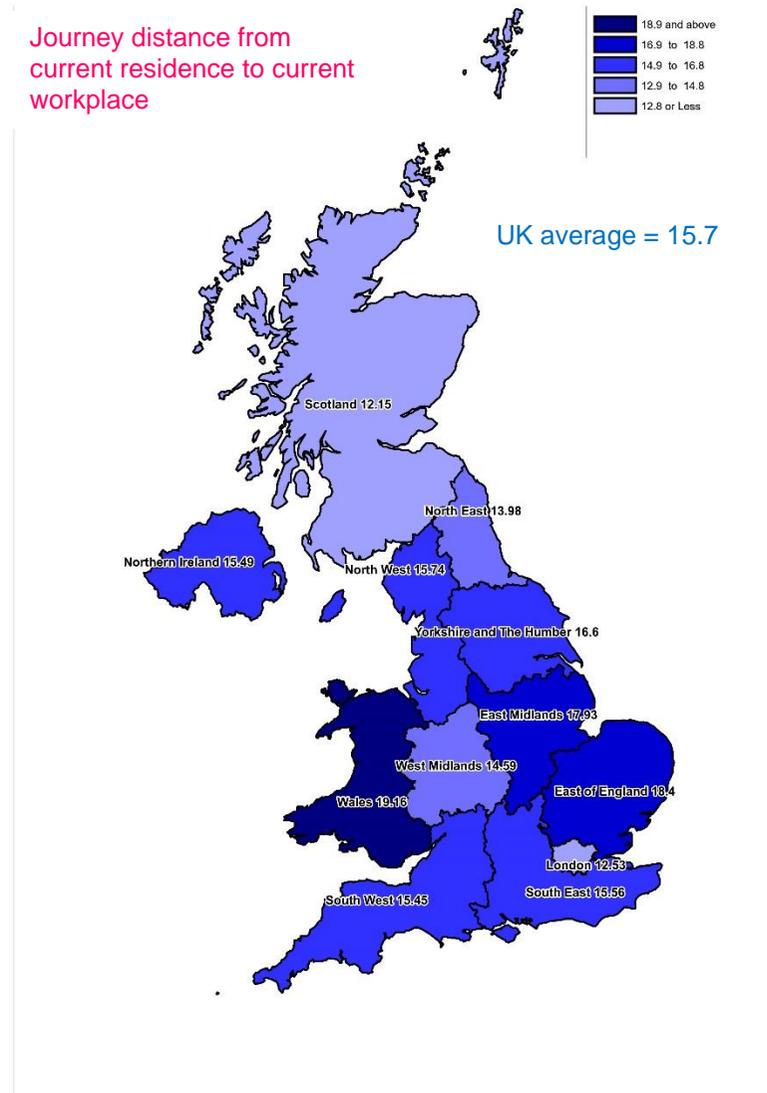
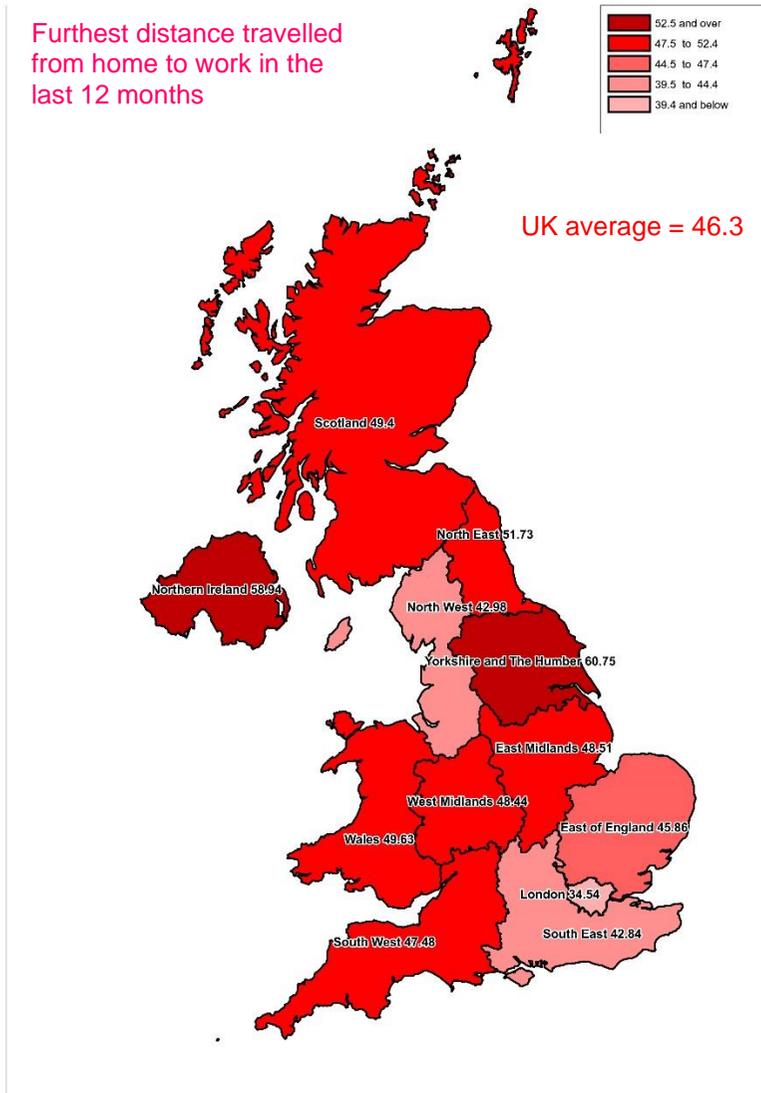
Journey distance to work

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 16 miles, and the overall trend since 2012 is downward (13 miles in 2018/19, 21 miles in 2015 and 33 miles in 2012).

This (slight) downward trend is also reflected in the national picture, where the average distance is 17 miles, down on 18 miles in 2018/19, 22 miles in 2015 and 28 miles in 2012.

Half (50%) of those providing a response travel less than 10 miles to work, similar to the 46% who did so in 2018/19, two in five (46%) travel between 10 and 49 miles (compared to

53% in 2018/19), and the remaining 4% travel further than this (compared to 1% in 2018/19).



Use of temporary accommodation

Both nationally and in the North West, around one in twenty construction workers (3%, 5% across the UK) reported that they were currently staying in temporary accommodation while working at their site, and this is in line with previous years in the North West (3% in 2018/19, and 2% in 2015 and 2012).

Expected site/phase duration

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

Responses range from 4% who expect to work for another week, 6% expecting another two to four weeks, a quarter (27%) for one to six months, a fifth (19%) six to twelve months, and just 1% more than a year.

Two-fifths (41%) do not know how much longer they expect to be working, significantly higher than 2018/19 (13%), and also higher than the 2022 UK average (32%).

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

Overall, 7% of construction workers in the North West do not expect to work on that site for more than a month, much lower than in 2018/19 (13%) and 2015 (21%). Just 1% believe they will be there for less than a week (compared to 4% in 2018/19).

More than half (54%) anticipate being on site for more than a month but less than a year, a little lower than the 59% who did so in 2018/19, but similar to the 2022 UK average of 53%.

One in ten (10%) expect to be on site for more than a year, which is lower than in both 2018/19 (22%) and 2015 (23%).

Three in ten (30%) are uncertain in this regard, somewhat higher than 2018/19 (13%), and the 2022 UK average of 22%.

Site manager are more likely than average to expect to work for over a year on the site (31%).

Figure 37: Length of time workers expect to work at that specific site during current phase*Base: All respondents*

	NW 2022 %	NW 2018/19 %	UK 2022 %
Less than a week	1	4	2
1-2 weeks	2	2	3
2-3 weeks	2	2	3
3-4 weeks	2	5	4
1-3 months	11	10	11
3-6 months	18	20	17
6-12 months	24	23	25
More than a year	10	22	13
Don't know	30	13	22
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>3,005</i>

Q24

Expected next site location

Three in five construction workers in the North West (60%) are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis. This represents a significant decline compared with previous surveys (86% in 2018/19, 79% in 2015, 65% in 2012). From being above the UK average in 2018/19, it is now below it (60% compares with 69% in 2022).

The proportion who are sure that this will not be the case has remained stable (5% compared to 3% in 2018/19), while the proportion who say it depends where the work is has increased, from 8% in 2018/19 to 31% in the latest survey, as is the case across the UK overall (from 8% in 2018/19 to 20% in 2022) – although it is to a greater extent in the North West.

The remaining 5% do not know.

Sub-sector and sector mobility

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

Sub-sector mobility

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

The pattern of response is similar to that in 2018/19, with new housing continuing to be the most common type of construction work undertaken (82%, compared to 88%), followed by housing repair and maintenance (45%, compared to 49%), commercial work (39%, compared to 47%), private industrial work (29%, compared to 41%), and public non-housing work (28%, compared to 48%).

However, there has been a decrease in the proportion of construction workers in the North West who have worked on infrastructure projects, from 26% in 2018/19 to 13% in the latest survey, the lowest proportion since the survey began in 2007. It is lower than the UK average of 23%, which has also seen a decline since 2018/19 from 31%.

In terms of the number of types of work undertaken, the results are in line with the UK average, but, compared with 2018/19, workers in the North West are more likely to have undertaken just one type of work - 41%, compared with 28% and less likely to have undertaken five or more (13% compares with 26% in 2018/19).

The likelihood that workers have worked only on one project type is significantly higher amongst the youngest workers (72% of those aged under 25, compared to 31% of 25 to 44 year olds and 39% of 45+ year olds). Correspondingly, the likelihood that workers have worked on five or six project types increases with age (none of those aged 16 to 24, but 22% of those aged 45 or over).

By current trade/occupation, site managers and carpenters are more likely than average to have worked on five or six project types (27% and 22% respectively).

Figure 38: Type of projects on which workers have spent significant periods of time
Base: All respondents

	NW 2022 %	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2022 %
New housing	82	88	93	72	78
Housing repair and maintenance including extensions/loft conversions	45	49	42	70	42
Commercial work such as shops, office, pubs etc	39	47	36	64	39
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	29	41	35	58	35
Public non-housing work such as schools, sports facilities, landscaping	28	48	37	55	32
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	13	26	20	42	23
Off-site manufacturing	3	-	-	-	6
ONE TYPE ONLY	41	21	16	9	42
TWO TYPES	19	16	9	14	17
THREE TYPES	17	9	8	15	13
FOUR TYPES	9	11	15	17	9
FIVE TYPES	10	15	10	22	9
SIX TYPES	3	21	16	9	6
<i>Unweighted bases</i>	<i>271</i>	<i>282</i>	<i>435</i>	<i>442</i>	<i>3,005</i>

Q4

Leaving the sector

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

More than four-fifths (86%) of construction workers in the North West think it is likely that they will still want to do so, including 47% who say they definitely will be, and 24% who think it is very likely. This is higher than the UK average of 82%.

Just 5% say it is unlikely that they will still want to work in construction in five years' time (compared with a UK average of 7%).

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 13% of construction workers aged 45 and over. The proportion that felt they *definitely* will still want to work in the construction sector in five years is fairly stable across the age groups in the North West, with 46% of those aged 20 to 24 (none of the 16 to 19 year olds gave this answer), 52% of 25 to 44 year olds and 44% of those aged 45 or over.

Figure 39: Likelihood of construction workers still wanting to be working in the construction sector in five years' time

Base: All respondents

	All %	Age %		
		16 - 24	25 - 44	45+
Definitely will be	47	47	52	44
Very likely	24	14	24	32
Quite likely	15	42	15	6
Quite unlikely	1	0	1	2
Very unlikely	3	5	3	1
Definitely will not be	1	2	1	0
Hope to be retired	4	0	0	13
Don't know	3	7	3	1
<i>Unweighted bases</i>	<i>271</i>	<i>42*</i>	<i>143</i>	<i>82</i>

Q38A

* Caution: low base

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 48% 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 17% believe it is quite likely they will want to be working in the construction sector. Overall 91% of this group are likely to some degree to want to be working in the sector, similar to the 90% who did so in 2018/19. Just 4% of this age group think it unlikely they will want to be working in the construction sector in five years (compared with 3% in 2018/19).

The North West construction workforce 2022 summary

The UK construction industry

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

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

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

Stability within the construction industry in the North West

However, a substantial proportion of industry workers, as surveyed here, have been in the industry for lengthy periods. Across the UK around 70% of workers have worked in the industry for 5 years or more (73% within the North West region), and this reflects findings from previous surveys. Demographic and other characteristics of the workforce therefore change little overall, and with only 11% of workers (9% in the North West) expecting to leave construction in the next 5 years, changes to the demography of the workforce can occur only at the margin. A doubling of the percentage of female or ethnic minority entrants would have only a minor effect on the overall structure of the workforce.

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

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

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

only 7% of workers across the UK (4% within the North West) - want to change their occupation.

Some indicators of change

Across the UK a further area of observed stability includes broad measures of qualification and training. For example, around seven in ten workers hold a construction-related qualification, 13% are working towards a qualification and 33% have had supervisory or management training. All these figures are broadly similar to those observed in 2018/19.

Within the North West, fewer workers hold a construction-related qualification than in 2018/19 (72%, compared with 78%), and fewer workers than in 2018/19 are working towards qualifications (7%, compared with 18%).

There appears to be greater reticence in taking on more responsibility this year than previously, with fewer respondents certain they want to become a supervisor or manager in the future (23% across the UK; 19% in the North West, compared with 30% and 30% respectively in 2018/19), and in the North West fewer workers than in 2018/19 have had formal training in managerial or supervisory knowledge or skills (29% compared to 39% in 2018/19), reflecting their lower level of interest this year in moving into management and supervisory posts, or perhaps lower levels of interest in these roles are due to less formal training being offered in this area?

While the proportion of North West workers holding industry Skills Cards is still high, it has fallen somewhat since 2018/19, from 98% to 91%. (97% to 93% across the UK over this period).

Overall, a higher proportion of construction workers in the North West in 2022 than in 2018/19 held construction-related qualifications prior to starting their first job in construction, with more than two fifths (42%) of construction workers in the North West reporting having no construction-related qualifications when they started their first job, compared with 68% in 2018/19, and 67% in 2015.

At the time of interviewing, nearly three quarters of construction workers in the North West reported holding a construction-related qualification (72%), fewer than the 78% who did so in 2018/19.

Since 2015 and 2018/19 surveys, within the North West the proportion of direct employees in the workforces has increased (from 57% in 2015, 56% in 2018/19 to 62% in 2022) while self-employment, although traditionally strong in the sector, has decreased (40% in 2015, 39% in 2018/19, 29% in 2022). The level of agency employment has increased from 4% in 2015 and 2018/19 to 9% in 2022. This is against the UK trend where an increase in self-employment is evident and likely to positively impact both employers - enabling increased flexibility and cost control – and workers - increased independence, but may be also having a negative impact, with greater uncertainty and insecurity in the industry for workers. However, in the North West, although the swing back to direct employment is apparent, it is

also relatively slight and may not reflect a longer-term trend. Thus, attention still needs to be paid to addressing lower levels of employer-led training, and support to improve the skills of the workforce, a significant proportion of which continues to be employed on a project-basis. Within the North West, a lower proportion of workers are working towards a qualification in 2022 than in previous studies (7%, compared to 18% in 2018/19 and 14% in 2015), and we would perhaps like to see this increase.

Another area of change identified by the survey concerns working hours. The proportion of workers working more than 50 hours per week has decreased somewhat since 2018/19, from 22% to 12% in the North West (24% to 19% across the UK). The change raises interesting questions as to whether some technological changes are permitting fewer but more productive hours for some workers; or whether workforce culture, in line with general trends since Covid, is disposing some workers to put personal time ahead of overtime hours; or, simply, whether demand pressures in the industry are lower.

The survey identified that across the UK fewer workers are travelling long distances to work (32% had worked more than 50 miles from home in 2022, compared with 41% in 2018/19) and this is echoed in the North West: 28% of North West workers had worked more than 50 miles from home in the last year, compared with 38% in 2018/19. The average travel distance to work was 16 miles in 2022 compared to 13 miles in 2018/19, 21 miles in 2015 and 33 miles in 2012, compared with 17 miles and 18 miles respectively across the UK.

Focus on how the North West differs from the UK average

Compared with the construction workforce across the UK as a whole, the North West stands out in a few respects:

- Although in the North West the proportion of the regional population that represent an ethnic minority group is similar to the UK average (13%, compared to 14%), only 1% of the region's sample represents an ethnic minority group
- Fewer construction workers in North West than across the UK hold a non-UK passport (3%, compared to 13%), and a higher proportion of North West workers than the UK average have lived in the region all their lives
- Fewer workers in the North West than the UK average have performed a supervisory or management role (22%, compared to 28%)
- At 62% the North West construction workforce has more directly employed staff than the UK average (48%)
- They are less likely than the UK average to work 50 or more hours per week (12%, compared to 19%)
- North West construction workers are less likely than the UK average to consider they have a need to improve their basic skills (8%, compared to 19%), and they are also less likely than average to be currently working towards qualifications (13%)

- Workers in the North West are among the most likely to have worked in the same region at their last site (87%), and also, compared with those in other regions/nations, the most likely to be working in the same region in which they started their construction careers (89%). However, they are less confident than the UK average with regard to finding another job that allows them to travel from their permanent home to work on a daily basis (60%, compared to 69%)

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