



THE RESULTS OF THE PEOPLE SURVEY – JUNE 2020

Introduction

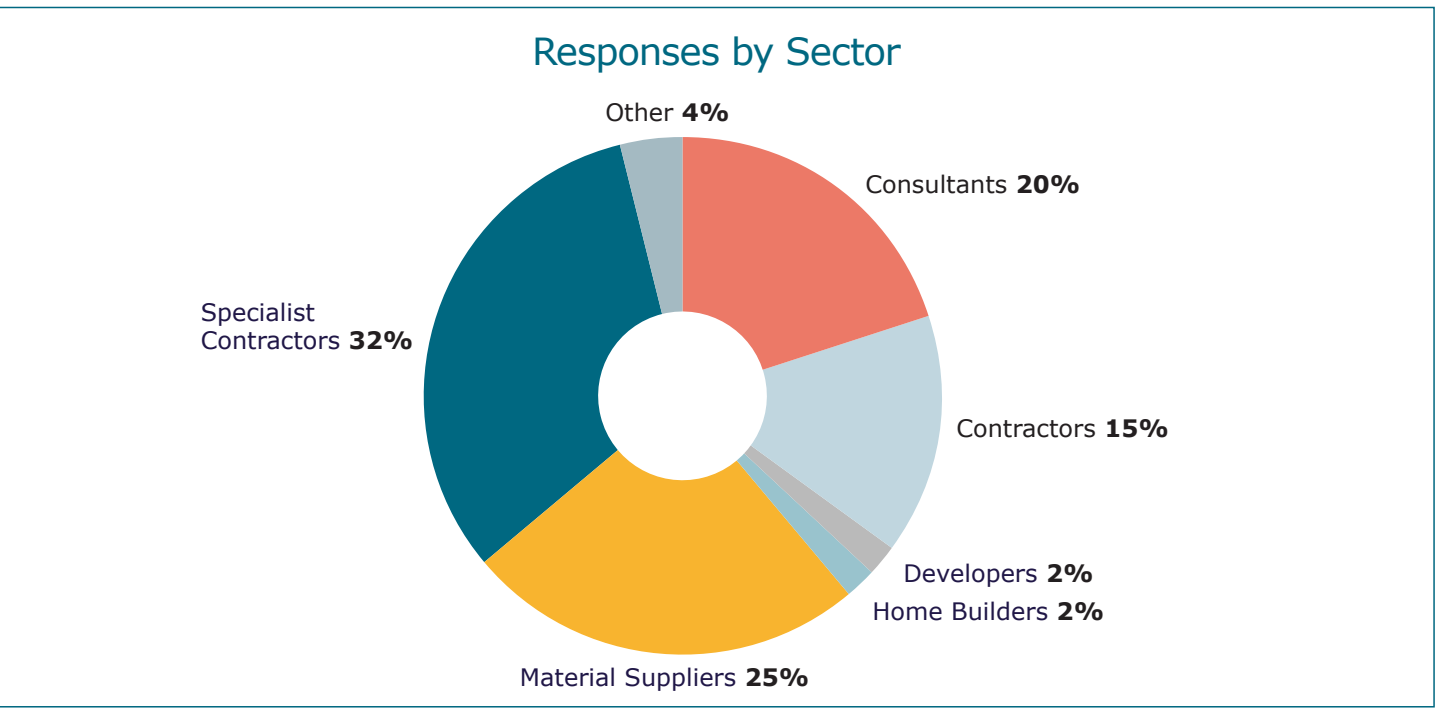
The cross-industry 'People Survey' was carried out by Build UK on behalf of the Construction Leadership Council (CLC) at the start of June 2020 to provide a snapshot of how a reduced workload post coronavirus (COVID-19) may affect the construction workforce.

This report summarises the key results, which provide valuable information to support the implementation of the industry's [Roadmap to Recovery](#), designed to 'restart, reset and reinvent' the sector over the next two years.



In particular, the data reinforces the importance of the following actions:

- Restarting work and stimulating activity
- Supporting employment including a Talent Retention Scheme
- Developing and delivering a pipeline of projects
- Ensuring funding for apprenticeships
- Avoiding disputes and minimising disruption
- Modernising the training and qualifications system.



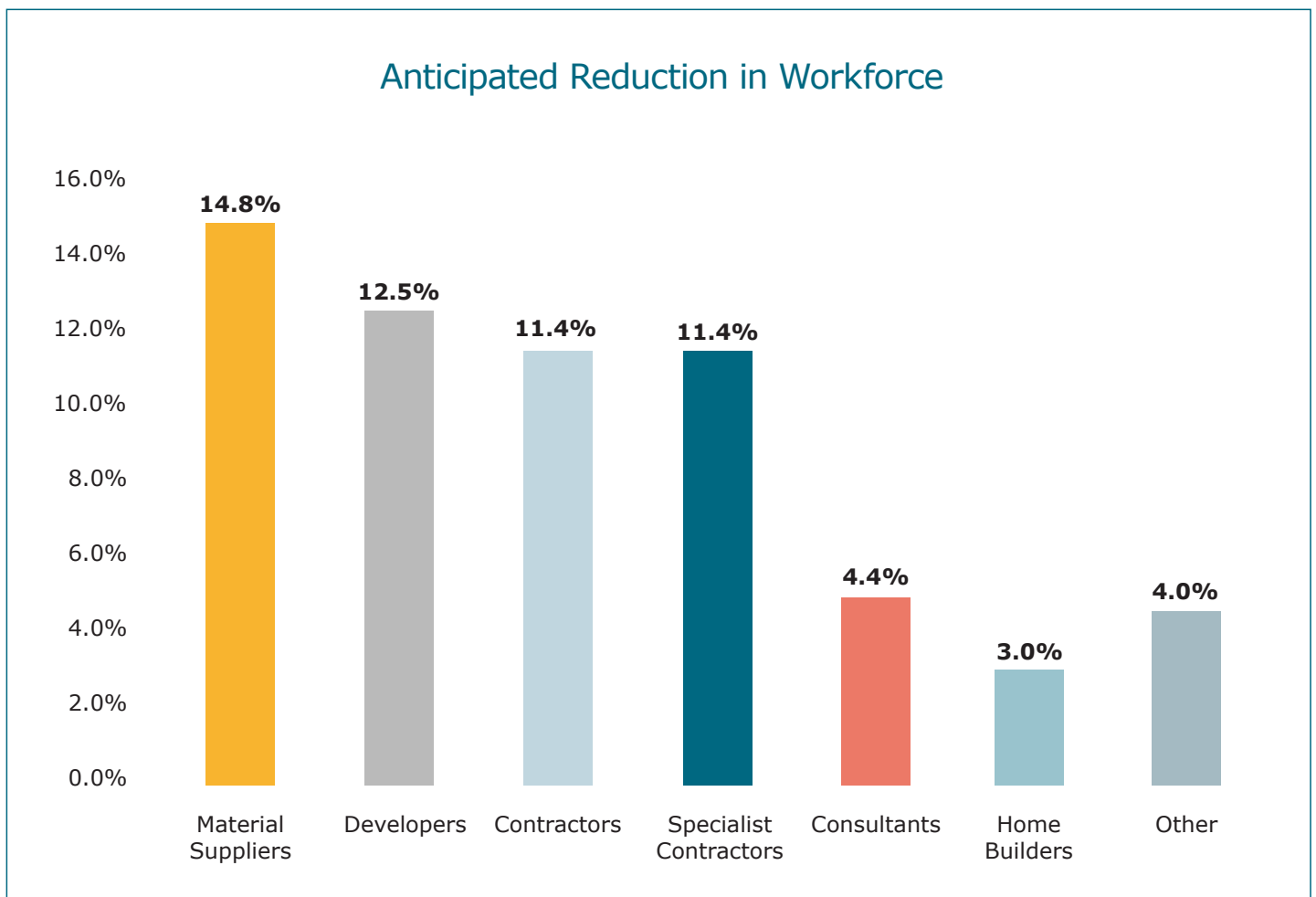
Employment

To understand the impact of coronavirus on jobs, the People Survey asked about employment levels three months ago (March) and anticipated employment levels in three months' time (September).

Respondents currently directly employ 89% of their workers, with the remaining 11% being self-employed or agency workers.

- On average, **32% of direct employees are currently furloughed**, with all sectors of the industry having accessed the Government's Coronavirus Job Retention Scheme at some point.
- There is anticipated to be a **7.7% reduction in the number of directly employed workers** across the industry by September.
- In the longer term, **43% of respondents anticipate making redundancies**, with up to 20% of their workforce being affected.
- There is expected to be a **26.7% reduction in the number of self-employed and agency workers** across the industry by September.
- Home Builders, Specialist Contractors and Contractors are the most significant users of self-employed and agency workers. Whilst Home Builders and Specialist Contractors anticipate reducing their numbers by just 4% and 11% respectively, **Contractors are looking to reduce self-employed and agency workers by 42%**. Other sectors most likely to reduce their numbers are Material Suppliers by 54.5% and Consultants by 45.6%.

Combining these figures shows an anticipated reduction in the construction workforce of 9.9% by September.



The Next Generation

The future pipeline of talent is essential for the long term sustainability of the industry. The People Survey sought to understand the immediate impact of the coronavirus pandemic on the number of apprenticeships and graduate programmes across the sector.

Apprentices

Half of respondents employ apprentices, with the highest numbers employed by Contractors (26%), Specialist Contractors (20%) and Home Builders (19%).

43% of apprentices are currently furloughed, with 6.7% likely to lose their jobs by September.

In the longer term, 10% of respondents are expecting to make apprentices redundant.

60% of companies expect to take on fewer apprentices at the next intake in September.

38% are looking to recruit the same number, with just 2% planning to take on more.

32% of respondents pay the Apprenticeship Levy and 84% of those employ apprentices. Only 34% of companies that don't pay the Apprenticeship Levy employ apprentices.

On average, those that pay the Apprenticeship Levy expect to **lose 31% of their Levy pot** at the end of this year, due to not being able to spend it within the two-year timeframe.

Graduates

Just 21% of respondents have a graduate scheme.

Clients are most likely to run schemes, with 50% confirming they offer one, and they provide an average of 7 graduate places each. On average, the greatest number of graduate places are provided by Consultants (29), Home Builders (12) and Contractors (10), although only a third of them run schemes.

It is anticipated that there will be a **32% fall overall in the number of graduate places available** at the next intake, although Home Builders and Contractors are expecting a smaller drop of 8 – 12%.



Training and Skills

Ensuring the industry has the skills it requires now and in the future will be key to its success, and the People Survey collected data on current training needs to help prioritise the limited funding and resources available.

87% of respondents provide training for their workforce and 49% of those expect to provide that online over the next three months.

By September, training providers are anticipating providing **56% of their courses online**. However, two thirds of training providers and respondents are optimistic that 'face to face' training may have resumed by this time.

The **majority of respondents (71%) are confident that they can access training** to meet their needs.

The most commonly identified training needs are Health and Safety (61%), Leadership (33%), Technology (32%) and People Management (32%).

