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Analysis of demand for construction skills provision in Ebbsfleet Garden City and Dartford

Final report

SQW

Contents

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Executive Summary

Introduction

1. Ebbsfleet Garden City is one of the UK's largest development programmes, bringing forward 15,000 homes, alongside a new transport network and a major employment centre around Ebbsfleet International station. It is already a focal point for construction activity, which will accelerate over the coming years, and it is at the centre of a much larger area of housing and employment growth.

2. In that context, Ebbsfleet Development Corporation, Dartford Borough Council and their partners discussed the potential for construction skills training centre, which could support growing workforce demand and create opportunities for local residents. To support this early proposal, this report sets out a review of construction skills demand and supply, alongside initial stakeholder perspectives.

The current workforce

3. Across a broad area of analysis stretching across North Kent and into southeast London (referred to as the 'Wider Area', an estimated 56,000 people are employed in construction, although this is likely to substantially undercount the number of people who are self-employed or contracted via agencies. Analysis of Oxford Economics estimates at regional level suggest a total workforce (including professional and technical and office-based roles) of around 97,000 across this wider area, including 16,000 in Dartford and Gravesham.

4. In general, the construction workforce is less highly qualified than the all-industries average, especially at Level 4 – and there are more workers with no formal qualifications. But Apprenticeship completions are much higher in the sector than in other industries.

5. Self-employment is highly prevalent in construction, especially as workers increase years of experience. Consequently, there is a large stock of businesses, and there has been strong growth in the number of enterprises in recent years.

Workforce demand

6. Construction vacancy rates rose sharply in the aftermath of the Covid-19 pandemic. But they have now returned to 2019 levels, and nationally are broadly in line with the all-industries average.

7. Analysis of projections developed by CITB and Oxford Economics suggest net annual growth in all construction sub-sectors over the next five years, with projected growth is widely distributed across occupational groups.

8. However, net growth is less than half of the total workforce requirement over the same period. Taking account of people retiring or otherwise exiting the industry, the annual requirement is potentially in the order of around 1,900 across the Wider Area, 1,700 in Kent and Medway and 300 in Dartford and Gravesham.

Training and skills provision

9. There were 740 construction Apprenticeship starts in 2024/25 in the Wider Area. These accounted for about 8% of all Apprenticeship starts, in line with the national average. Annual Apprenticeship achievements equate to about half the annual number of starts, and the 'achievement rate' has fallen over time.

10. There were around 2,500 construction further education enrolments in the Wider Area in 2023/24. Recently commissioned analysis found that around 75% of all provision was in plumbing, carpentry and electrical, with relatively small numbers in professional, associate professional and technical areas. However, there is a substantial construction higher education offer, especially at MidKent College and LSEC in southeast London.

11. There is also a substantial volume of commercial provision, which has grown in recent years and also offers pre-employment as well as in-work training.

Perspectives on an additional offer

12. There will be significant demand for construction labour over the next few years, although there are challenges in meeting this, given the ageing workforce profile and the need to attract new entrants. In that context, stakeholders were (in general terms) supportive of a new skills training offer at Ebbsfleet.

13. The main focus of feedback was on developing new approaches to Apprenticeship training, with a view to increasing participation and reducing the attrition rate. It was noted that a new facility could offer a route to piloting new forms of delivery - for example, the prospect of 'fast track' Apprenticeships. Complementarity with the existing offer (especially the private sector offer) will also be important.

14. As the proposal is developed further, it would be helpful to consult further with a number of subcontractors, given that smaller businesses are most likely to have a direct interface with a new facility.

1. Introduction

Background

1.1 Covering around 1,000 hectares of previously developed land between Dartford and Gravesend, Ebbsfleet Garden City is one of the UK's largest development programmes. The ambition is to bring forward 15,000 homes, alongside a new transport network and a major employment centre around Ebbsfleet International station. So far, almost 5,000 homes have been completed, and delivery is proceeding at around 500 homes per annum, alongside a programme of open space and placemaking[1]. Beyond Ebbsfleet itself, there is also a high level of current and planned construction activity in the wider area, both as a result of substantial housing growth in Dartford and the rest of the Thames Estuary, and other major projects such as the Lower Thames Crossing.

1.2 Ebbsfleet Development Corporation, Dartford Borough Council and their partners are committed to an 'inclusive growth' agenda, which includes ensuring that local residents are able to access the opportunities that development will present. At the same time, there is widespread recognition of the skills shortages that exist in the built environment sector, both locally and nationally, and increasing access to skills and entry into the industry is a high priority. In that context, Ebbsfleet Development Corporation has discussed the potential for an additional construction skills training centre in general terms, although the focus of this is yet to be determined.

1.3 To help consider whether there is a need for additional training facilities (and if there is, what the likely focus of this should be), this report sets out a review of construction skills demand and supply in Ebbsfleet, Dartford and the broad travel-to-work area, alongside initial stakeholder perspectives. It is intended that, alongside further analysis, this could help to inform a business case for new provision in due course, should the need be demonstrated.

Report structure

1.4 The report is structured in three main sections:

- Chapter 2 considers the **current workforce**, looking at total employment in construction, employment growth over recent years, the age profile of the workforce and labour mobility.
- Chapter 3 considers potential **construction skills demand**, drawing on regional forecasts commissioned by the CITB and other published material, as well as eight

[1] Ebbsfleet Development Corporation (7 May 2025), Corporate Plan 2021-25 Review and Lessons Learned/Reflections

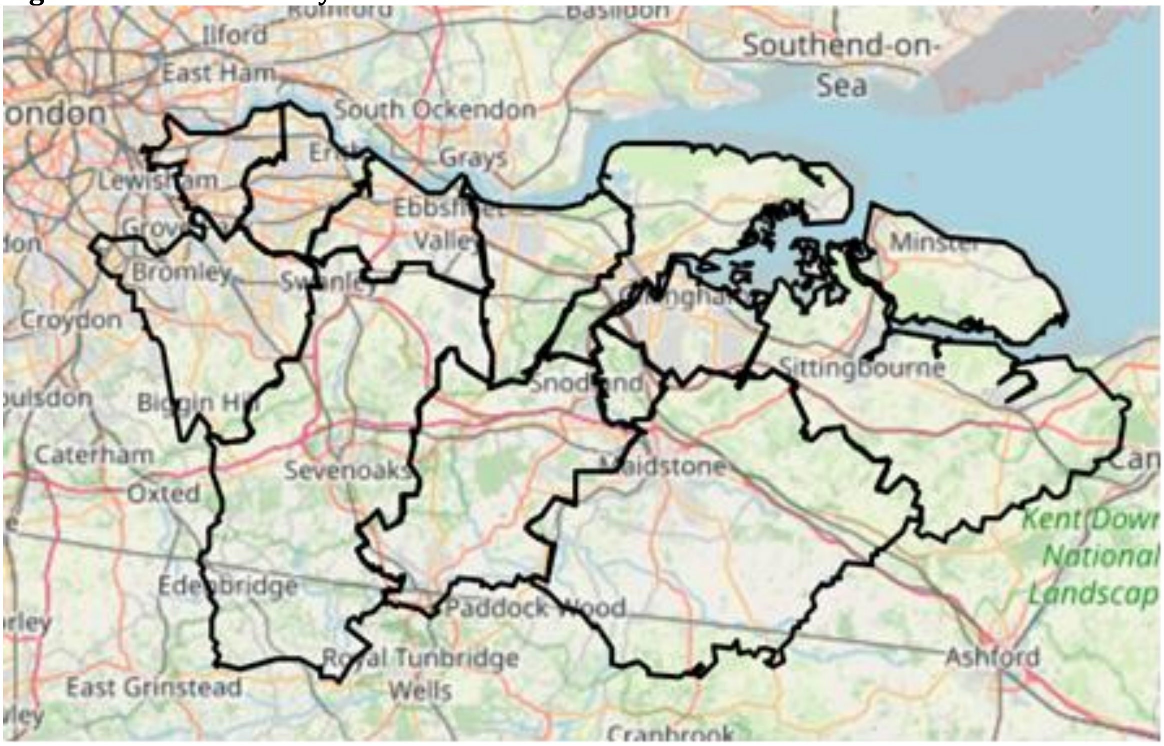
consultations with housebuilders, contractors and skills providers with a presence in Ebbsfleet.

- Chapter 5 considers the **current supply of skills and training**, based on existing further education and private provision.
- Chapter 6 brings the **supply and demand perspectives together**, including employers' perspectives on the extent to which the two are in balance and the potential case for a new training and skills facility at Ebbsfleet.

Area of analysis

1.5 The construction workforce is mobile, and many workers at Ebbsfleet will be drawn from outside the area (although as noted, there is a policy goal to maximise local access to opportunities). However, in considering local supply and demand, we have used an area of analysis covering Dartford and Gravesham, *plus* Medway, Maidstone, Swale and Tonbridge and Malling and Sevenoaks, and the London boroughs of Bexley, Bromley and Greenwich:

Figure 1-1: Area of analysis



1.6 This broadly reflects accessibility and proximity to Ebbsfleet, although there is obviously substantial overlap with the broader Greater London market. We refer to this extended area as the 'Wider Area' in the tables contained later in the report, and we also provide data for Kent and Medway and for Dartford and Gravesham specifically.

2. Workforce supply

Summary

- Across the 'Wider Area', an estimated 56,000 people are employed in construction, although this is likely to substantially undercount the number of people who are self-employed or contracted via agencies. Analysis of Oxford Economics estimates at regional level suggest a total workforce (including professional and technical and office-based roles) of around 97,000 in the Wider Area, 91,000 in Kent and Medway, and 16,000 in Dartford and Gravesham.
- In general, the construction workforce is less highly qualified than the all-industries average, especially at Level 4 – and there are more workers with no formal qualifications. But Apprenticeship completions are much higher in the sector than in other industries.
- Self-employment is highly prevalent in construction, especially as workers increase years of experience. Consequently, there is a large stock of businesses, and there has been strong growth in the number of enterprises in recent years.
- Survey data suggest that travel distances from home to site have reduced over time, despite the need for workforce mobility. The average regional home to work distance largely corresponds with the 'Wider Area' set out earlier.

Introduction

2.1 This chapter considers the profile of the construction workforce in Ebbsfleet and its surrounding area. First, it looks at the level of construction employment in the area and change over time, and the estimated occupational distribution of the workforce. It then considers the characteristics of the construction workforce, drawing on regional CITB analysis and other sources. Finally, it considers the construction business profile, which is also very relevant to the composition of the workforce, given high levels of self-employment within the industry.

Estimating the size and composition of the current workforce

2.2 There are three ways in which the size of the current local construction workforce can be measured: through ONS data measuring the number of **residents** employed in the industry;

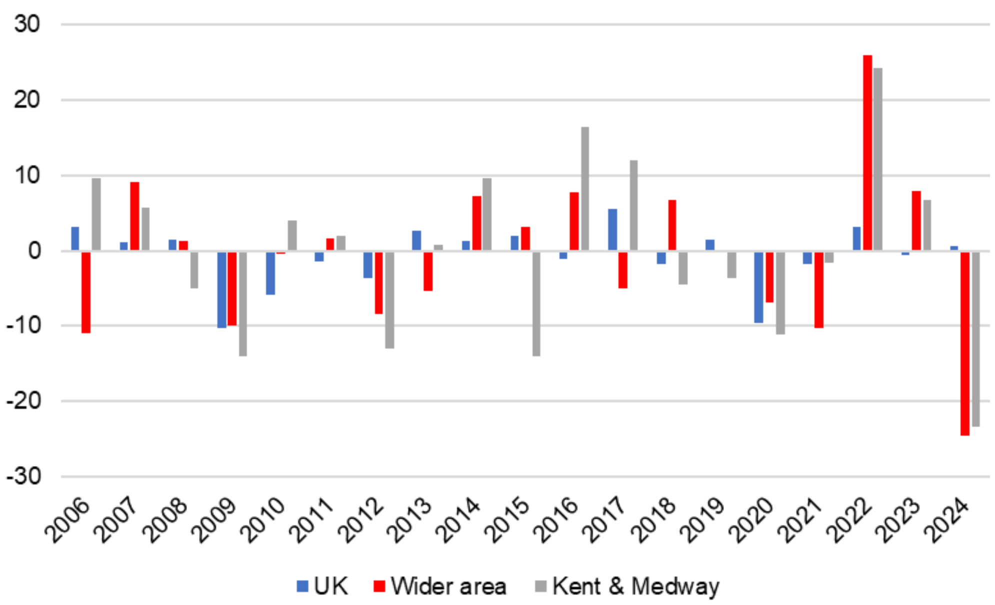
ONS data measuring the volume of **employment**; and analysis of **bespoke industry estimates** prepared for the CITB.

Residents employed in the construction industry

2.3 The Annual Population Survey estimates the size of the local resident workforce (i.e., people living locally working in construction, even if their workplace is elsewhere). In 2024, there were around 70,300 people living in the Wider Area working in the construction sector (and around 71,300 living in Kent and Medway). Data for Dartford and Gravesham are subject to quite large confidence intervals and significant inter-year volatility, but in the three years between 2022 and 2024, the workforce within the two boroughs averaged at around 12,400[2].

2.4 Over the long term, the APS-estimated workforce has not seen sustained growth, either nationally or at sub-regional level: in the UK, the Wider Area and Kent and Medway, total resident workforce size was actually somewhat smaller in 2014 than it was ten years previously[3]. However, there is substantial volatility in workforce numbers from year to year, reflecting the cyclical nature of the industry, with volatility increasing in recent years[4]:

Figure 2-1: Annual change in construction workforce (%)



Source: ONS, Annual Population Survey. Dartford and Gravesham district data excluded due to high confidence intervals and volatility

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[2] ONS, Annual Population Survey. These data relate to people of all ages (i.e., the total workforce), not just those aged 16-64. Note that there will be some others working in professional and technical occupations (such as architects and surveyors) that are not typically counted within the 'construction' sectoral definition. We consider these further below.

[3] The resident workforce fell by 2.6% between 2014 and 2024 in the UK, 3.8% in the Wider Area, and 8.6% in Kent and Medway

[4] Note that APS confidence intervals are larger at sub-regional level than they are nationally.

Construction industry employment

2.5 The other source of official data is the Business Register and Employment Survey (BRES), which measures total employment by industry. In this case, the data relate to the main location of employment. While BRES data are also subject to large confidence intervals at local level, they do allow somewhat more detailed analysis of employment by sub-sector, based on the standard industrial classifications of employing organisations.

2.6 Overall, BRES estimates employment of around 10,000 in Dartford and Gravesham, and around 56,000 in the 'Wider Area'. There is a substantial gap between these estimates of employment and the workforce estimates above: this is replicated at national level, and reflects the prevalence of sole trading and self-employment within the industry, as well as numbers contracted via employment agencies. Table 2-1 sets out the most recent estimate of sub-sectoral employment:

Table 2-1: Construction industry employment (2023)

Sector	Dartford & Gravesham	Wider Area	Kent & Medway
Development of building projects	500	4,000	4,500
Construction of resi and non-resi buildings	3,000	14,000	13,000
Construction of roads and railways	200	3,500	4,000
Construction of utility projects	<10	250	400
Construction of other civil engineering projects	300	3,500	3,500
Demolition and site preparation	400	1,250	1,000
Electrical, plumbing & other installation	3,000	17,000	16,000
Building completing & finishing	800	7,000	6,000
Other specialised construction activities	1,500	5,000	5,000
Total	10,000	56,000	54,000

Source: ONS, Business Register and Employment Survey

2.7 Despite evidence of a static or falling *workforce*, total local *employment* volumes have increased over recent years, at a faster rate than the national average. In all three local and sub-regional geographies, the construction sector also accounts for a higher share of total employment than it does in Great Britain as a whole: in Dartford and Gravesham, the industry share of employment is almost twice the national average:

Table 2-2: Comparison of construction employment growth and concentration

	Employment (2023)	Annual growth rate, 2015-23	Share of total employment	Location quotient[5]
Dartford & Gravesham	10,000	1.3%	9.5%	1.9
Wider Area	56,000	2.8%	7.7%	1.6
Kent and Medway	54,000	2.9%	7.0%	1.4
Great Britain	1,573,000	1.5%	4.9%	1.0

Source: ONS, Business Register and Employment Survey

CITB estimates

2.8 The CITB prepares regular estimates of the size of the construction workforce, along with projections for future growth (which we consider further in the next chapter). The most recent estimates were calculated by Oxford Economics at national and regional level, using 2024 as the base year, and break down the total workforce by trade and occupation, including professional and technical occupations that are not included in the standard 'construction' sector as defined in the official data.

2.9 While the CITB/ Oxford Economics data are only published to regional level, we have estimated the approximate size of the workforce based on the construction industry share of total employment. For the Wider Area, this yields an approximate workforce size of around 97,000 in 2024, of which around 42,000 are accounted for by 'skilled trades and site based' roles. Table 2-3 breaks this down by occupational group:

Table 2-3: Estimated construction workforce (2024)

Occupational group	OE estimates	SQW estimates based on OE regional analysis		
	South East	Dartford & Gravesham	Wider Area	Kent & Medway
Managers and supervisors				
Directors, executives & senior managers	44,960	1,920	12,450	10,890
Construction project managers	6,470	280	2,300	1,570
Construction trades supervisors	5,890	250	1,800	1,430
Skilled trades and site based				

[5] The location quotient is a measure of relative concentration. A LQ of more than 1 means that the sector accounts for a greater share of total employment than the Great Britain average. A LQ of less than 1 means that it accounts for a smaller share.

Occupational group	OE estimates	SQW estimates based on OE regional analysis		
	South East	Dartford & Gravesham	Wider Area	Kent & Medway
Electrical installation trades	17,980	770	4,400	4,350
Carpenters and joiners	19,930	850	5,030	4,830
Plumbing and HVAC trades	17,940	760	4,200	4,340
Labourers	21,050	900	5,070	5,100
Painters and decorators	12,330	530	3,070	2,990
Bricklayers and masons	7,290	310	1,670	1,770
Plasterers	7,270	310	1,600	1,760
Logistics	4,840	210	1,140	1,170
Plant operatives	3,410	150	930	830
Roofers	5,470	230	1,250	1,330
Plant mechanics/ fitters	3,970	170	930	960
Floorers and wall tilers	3,640	160	940	880
Groundworkers	4,090	170	950	990
Scaffolders	3,850	160	960	930
Road and rail construction operatives	2,240	100	610	540
Glaziers and window trades	1,950	80	500	470
Steel erectors and metal workers	1,580	70	340	380
Other construction and building trades	22,800	970	6,760	5,520
Non-construction trades & operatives	6,290	270	1,550	1,520
Professional and technical				
Surveyors	11,480	490	2,790	2,780
Civil engineers	8,050	340	2,200	1,950
Architects	4,340	190	2,120	1,050
Other professional & technical	39,420	1,680	9,770	9,550

Occupational group	OE estimates	SQW estimates based on OE regional analysis		
	South East	Dartford & Gravesham	Wider Area	Kent & Medway
Office based				
Non-construction prof & technical	50,170	2,140	13,240	12,150
Other non-construction office based	36,350	1,550	8,550	8,800
Total	375,060	15,980	97,130	90,800

Source: Oxford Economics/ CITB (2025), Construction Workforce Outlook for England; SQW analysis. Note that columns do not sum, due to rounding.

Workforce characteristics

2.10 Regular surveys of the on-site construction workforce are carried out as part of the CITB's *Workforce Mobility and Skills Report*, which reports results at regional (i.e., South East) level[6]. The most recent report was published in 2023, using research carried out in 2022: while that year was characterised by some economic instability given recovery from the Covid pandemic and the energy crisis, overall workforce composition changes relatively slowly, and the findings remain relevant. The following paragraphs draw out some key headlines from the survey report, alongside other data where relevant.

Workforce demographics

2.11 Over the long term, the construction industry has an ageing workforce – in line with the rest of the economy, although the physically demanding nature of many roles in construction presents a particular challenge for the industry. The recent CITB report notes that **in recent years, the age profile has remained generally stable** in the South East, with those over 45 accounting for around a third of the workforce, and around 16% in the 16-24 age group.

2.12 **Overwhelmingly, the on-site workforce is male** (and the *Workforce Mobility and Skills Report* notes that while increasing diversity in the workforce is a route to greater recruitment in the long run, "even a doubling of the percentage of female entrants would have only a minor effect on the overall structure of the workforce"[7]. **In terms of ethnic background however, there has been a gradual shift over time towards greater diversity**: around 11% of construction workers in the South East were of ethnic minority origin in 2022[8] – broadly reflecting the composition of the regional workforce overall, and compared with less than 5% in 2012.

[6] CITB/ BMG Research (2023), *Workforce Skills and Mobility in the Construction Sector 2022*, based on face-to-face interviews with construction workers.
[7] Ibid., p.52
[8] And 19% in London

Work history and inter-occupational movement

2.13 **Around a third of construction workers in the South East have worked in the construction industry for over 20 years** (mirroring the workforce age profile noted above). Over time, there has been an increase in the proportion of the workforce that have continuously worked in the industry: in 2022, 71% in the South East reported that they had always worked in construction, an increase from 62% in 2018/19.

2.14 35% reported that they had worked in more than one construction trade or occupation over their careers, with labourer/ general operative cited as the most likely previous trade, reflecting progression over time from entry-level occupations. 81% reported that they would like to carry on in the same trade.

Travel to site

2.15 **The average reported distance to work for South East construction workers was 16 miles in 2022.** From Ebbsfleet, a 16 mile radius essentially encompasses the defined 'Wider Area', plus parts of Essex and East London, containing a total population of about 4.16 million:[9]

Table 2-4: Average construction worker journey to work, South East, 2022

	%
9 miles or less	30
10-49 miles	54
Over 50 miles	16

Source: CITB/ BMG Research

2.16 The 'longest distance travelled in the past 12 months' was substantially greater than this (an average of 43 miles), reflecting a propensity to travel to widely distributed sites, although distances travelled have fallen over time. 6% reported that they were currently staying in temporary accommodation while working at their site.

Employment duration

2.17 29% of surveyed workers in the South East were employed on a temporary basis. Two-thirds were confident that once they had finished their current job, they would get another job that would allow them to travel from home to work on a daily basis. However, this percentage share had fallen sharply from the previous survey; in parallel, the 2022 survey highlighted greater uncertainty of longevity of employment.

[9] 2021 census, via Datadaptive

Workforce migration

2.18 78% of workers in the South East reported that they had been living in either the South East or London before they entered their first construction job (with 74% the equivalent figure for workers in London). Generally, the propensity to stay working in the 'home region' has increased over time, with a strong relationship between London and the South East.

2.19 International migration makes an important contribution to the construction workforce, with a strong concentration in London and (to a lesser extent) the South East. However, the share of international migrants within the workforce has fallen in recent years, with new migrant workers generally increasingly in higher-skilled occupations and more likely to be from non-EU countries[10].

Skills and qualifications

2.20 The 2021 Census provides evidence on the qualifications profile of the construction workforce, although at the time of writing, this does not give a full picture at local or sub-regional level. For England and Wales as a whole, the overall formal qualifications profile for the industry shows a much lower share of the workforce with Level 4 qualifications or higher, and a somewhat higher share of the workforce with no formal qualifications[11]. On the other hand, the share of the workforce with Level 3 qualifications or a completed Apprenticeship is higher than in other sectors.

Table 2-5: Highest qualification achieved, construction, England and Wales (Census 2021, %)

Qualification	Construction	All industries
Level 4+	24.54	42.71
Level 3	23.44	19.76
Apprenticeship	12.76	4.72
Level 2	14.27	13.32
Level 1	10.39	8.78
Other qualifications	2.44	2.01
No formal qualifications	12.16	8.71

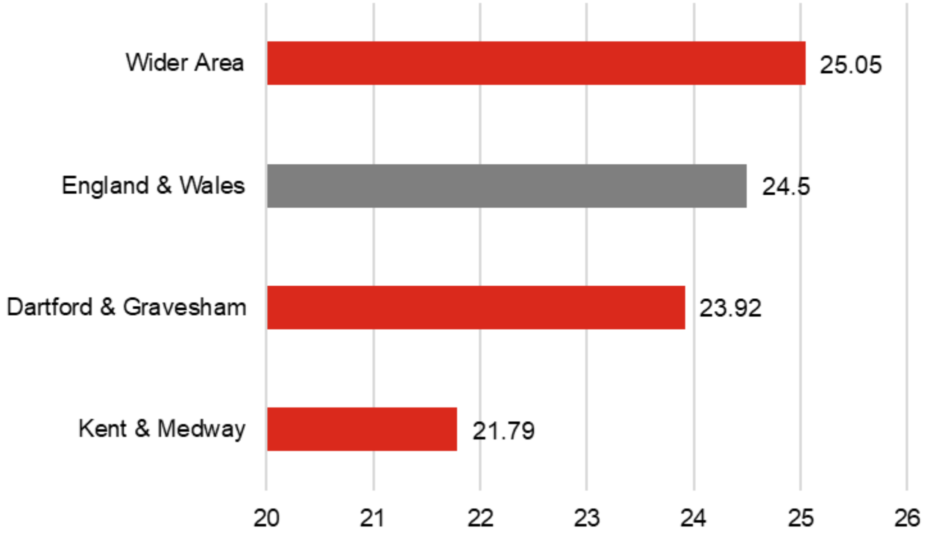
Source: Census 2021

2.21 Qualification levels are not fully broken down at local level, although the Census does indicate the proportion of the workforce that has achieved a higher education (Level 4+) qualification.

[10] CITB (June 2023), *Migration and Construction*
[11] Although as noted above, there are built environment technical and professional roles that fall outside of the construction sector definition.

This is somewhat below the England and Wales average in Dartford and Gravesham and Kent and Medway, although slightly higher in the Wider Area extending into southeast London:

Figure 2-2: Level 4+ qualifications (% of people working in the construction sector)



Source: Census 2021, Education by Industry data tables

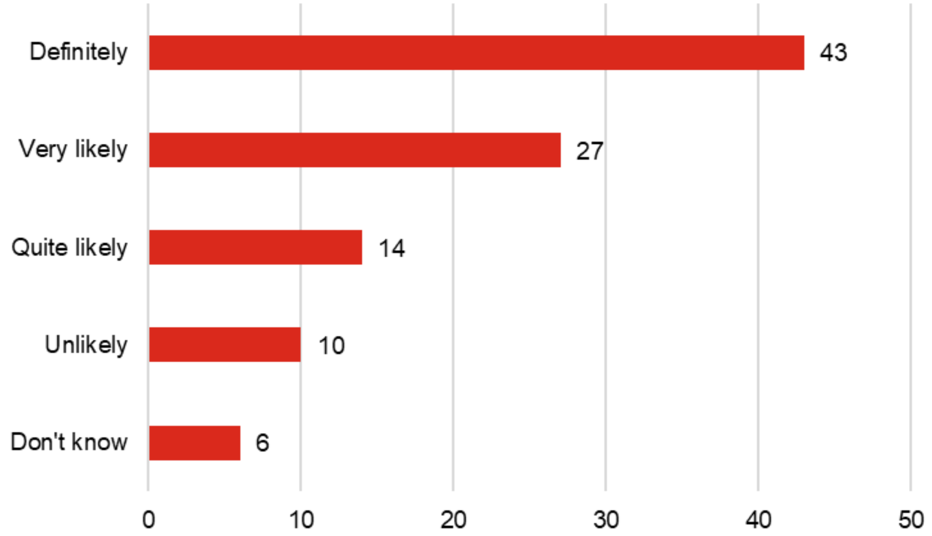
2.22 In addition, 93% of construction workers surveyed in the in the South East for the CITB/ BMG study reported holding a skills card or certificate (mostly CSCS), with 10% working towards formal qualifications relevant to the industry. 45% reported holding no construction-related qualifications when they started their first job, a proportion that has declined substantially over time, probably reflecting the changing composition of the workforce as older workers retire and younger workers (more likely to have pre-existing qualifications) enter.

2.23 However, 20% of workers reported that they believed they would benefit from some form of basic skills training (mostly in written or spoken English), with an increase in this self-reported need over time.

Potential sector outflow

2.24 To assess the potential outflow from the sector over the next five years, workers were asked how likely it was that they would still be working in the construction sector in five years' time. Excluding those aged 60 and over (who are likely to be considering retirement at some point in that period), 84% considered they were likely to want to still be working in the sector.

Table -2-6: Likelihood of construction workers in the South East to still be wanting to work in the sector in five years' time (% of respondents, n=283)



Source: CITB/ BMG Research

Self-employment and business stock

2.25 Self-employment is very high in the construction industry. Across all industries, around 13% of people in employment nationally were self-employed in 2024[12]. But the CITB workforce survey found that 42% of on-site construction workers were self-employed in 2022, rising to over half of all workers with over five years' experience (with employment agency contracts accounting for the majority of workers with less than one year's experience).

2.26 Consequently, construction accounts for a higher proportion of the business stock than it does of total employment, with about a fifth of all businesses in Dartford and Gravesham operating in the construction sector. Growth in the business stock has also been strong in recent years – apparently more rapid than growth in total employment, suggesting a potential increase in fragmentation over time.

Table 2-7: Comparison of construction business stock growth and concentration

	Businesses (2024)[13]	Annual growth rate, 2014-24	Share of total business stock	Location quotient[14]
Dartford & Gravesham	2,010	4.4%	20.0%	1.6
Wider Area	15,600	4.1%	18.0%	1.5
Kent and Medway	14,290	4.2%	16.8%	1.4

[12] ONS, Annual Population Survey
[13] Measured as local units
[14] The location quotient is a measure of relative concentration. A LQ of more than 1 means that the sector accounts for a greater share of total business stock than the UK average. A LQ of less than 1 means that it accounts for a smaller share.

	Businesses (2024)[13]	Annual growth rate, 2014-24	Share of total business stock	Location quotient[14]
UK	3,173,655	3.6%	12.3%	1.0

Source: ONS, UK Business Count

2.27 Overwhelmingly, the sector is dominated by small and micro businesses, reflecting the high number of sole traders: 87% of all construction businesses in Dartford and Gravesham employed four or fewer people, for example (and most of these will be one or two people), notwithstanding the presence of some larger employers such as Laing O'Rourke:

Table 2-8: Enterprises by employment sizeband, 2024

Employment sizeband	Dartford & Gravesham		Wider Area		Kent & Medway	
	No	%	No	%	No	%
0-4	1,750	87.1	13,745	88.1	12,445	87.1
5-9	135	6.7	1,085	7.0	1,060	7.4
10-19	70	3.5	430	2.8	435	3.0
20-49	25	1.2	220	1.4	235	1.6
50-99	15	0.7	70	0.4	70	0.5
100-249	10	0.5	35	0.2	35	0.2
250+	5	0.2	10	0.1	10	0.1
Total	2,010		15,600		14,290	

Source: ONS, UK Business Count

3. Workforce demand

Summary

- Construction vacancy rates rose sharply in the aftermath of the Covid-19 pandemic. But they have now returned to 2019 levels, and nationally are broadly in line with the all-industries average.
- Analysis of projections developed by CITB and Oxford Economics suggest net annual growth to 2029 of about 910 construction jobs across the Wider Area, 770 in Kent and Medway and 140 in Dartford and Gravesham. It is anticipated that all construction sub-sectors will see net growth over the next five years in London and the South East, and projected growth is widely distributed across occupational groups.
- However, net growth is less than half of the total workforce requirement over the same period. Taking account of people retiring or otherwise exiting the industry, the annual requirement is potentially in the order of around 1,900 in the Wider Area, 1,700 in Kent and Medway and 300 in Dartford and Gravesham.

Introduction

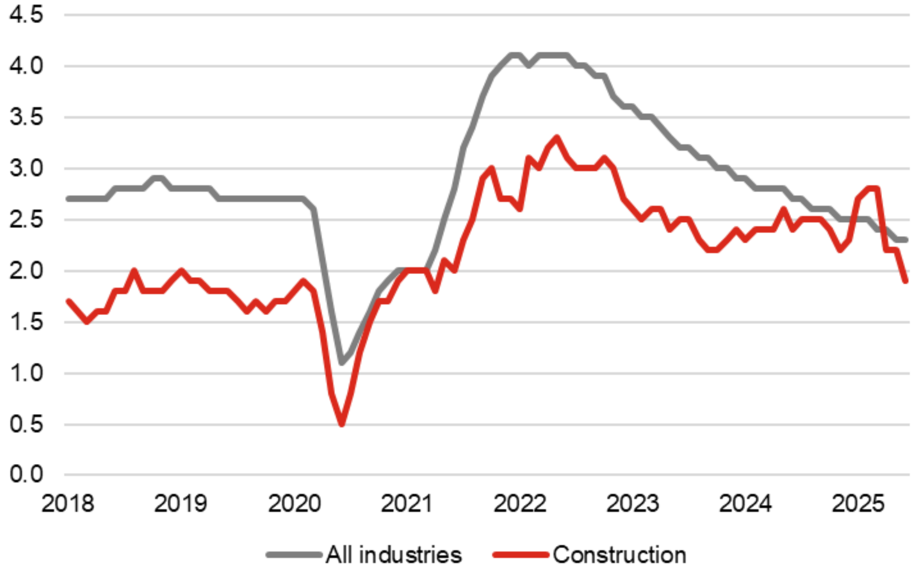
3.1 Building on the analysis of the existing workforce in Chapter 2, this chapter looks at potential future demand. It considers vacancy rates, quantitative demand forecasts based on national and regional analyses, and those major projects in the region that are likely to drive demand.

Vacancies

3.2 Following a peak in construction vacancy rates in 2022/23, in the aftermath of the pandemic, vacancies have returned to 2019 levels, although rates remain slightly higher in the South East relative to other regions[15]. The total national vacancy rate in construction (1.9 vacancies for every 100 employee jobs on the latest data) is now slightly below the national all-industries rate, although it has broadly tracked it over the past year[16].

[15] CITB (June 2025), Construction Workforce Outlook
[16] ONS (June 2025), VACS02: Vacancies by industry

Figure 3-1: Vacancies per 100 employee jobs, UK



Source: ONS, Vacancies by industry

Quantitative demand forecasts

CITB projections

3.3 Looking to the future, the CITB's *Construction Workforce Outlook* sets out a quantitative forecast of labour requirements in the construction industry, using projections developed by Oxford Economics. Between 2024 and 2029, this estimates that some 7,090 new workers will be required by the industry in the South East each year – a greater number than net growth in total employment, given 'replacement demand' for workers retiring or otherwise exiting the sector. While in some parts of the UK, demand is static or negative in some construction sub-sectors, the South East and London are expected to see growth in every category, including in professional and technical and managerial roles.

3.4 The CITB/ Oxford Economics forecasts are only produced to regional level. However, we have used the Oxford Economics forecasts for London and the South East to estimate annual demand in Dartford and Gravesham, the Wider Area and Kent and Medway, using the same approach taken in Chapter 2 to estimate local employment by occupational group. In summary, this anticipates an annual requirement as follows:

Table 3-1: Construction workforce forecasts, 2024-29

	Dartford & Gravesham	Wider Area	Kent and Medway
All construction industry jobs			
Net annual jobs growth	140	910	770
Annual new workers	300	1,930	1,720

	Dartford & Gravesham	Wider Area	Kent and Medway
Construction industry jobs, less non-construction office-based			
Net annual jobs growth	110	740	630
Annual new workers	230	1,510	1,330

Source: SQW analysis, based on Oxford Economics/ CITB and ONS BRES. All numbers are rounded

3.5 Table 3-2 breaks this down further, by occupational group:

Table 3-2: Annual construction workforce requirements, 2024-29

Occupational group	OE forecasts, South East		SQW estimates, based on OE regional analysis		
	% annual growth	No	Dartford & Gravesham	Wider Area	Kent & Medway
Managers and supervisors					
Directors, executives & senior managers	0.7	850	40	250	200
Construction project managers	1.4	170	10	50	40
Construction trades supervisors	1.2	140	10	40	30
Skilled trades and site based					
Electrical installation trades	1.0	330	10	80	80
Carpenters and joiners	1.1	370	20	90	90
Plumbing and HVAC trades	0.9	310	10	80	80
Labourers	0.8	340	10	90	80
Painters and decorators	0.6	180	<10	40	40
Bricklayers and masons	1.2	140	<10	40	30
Plasterers	1.0	130	<10	30	30
Logistics	1.7	120	<10	30	30
Plant operatives	1.9	90	<10	30	20
Roofers	1.1	110	<10	30	30
Plant mechanics/ fitters	1.4	90	<10	20	20

Occupational group	OE forecasts, South East		SQW estimates, based on OE regional analysis		
	% annual growth	No	Dartford & Gravesham	Wider Area	Kent & Medway
Floorers and wall tilers	1.2	70	<10	20	20
Groundworkers	1.2	80	<10	20	20
Scaffolders	1.1	70	<10	20	20
Road and rail construction operatives	0.9	<50	<10	10	10
Glaziers and window trades	1.0	<50	<10	10	10
Steel erectors and metal workers	1.4	<50	<10	10	10
Other construction and building trades	1.0	410	20	130	100
Non-construction trades & operatives	1.0	110	<10	30	30
Professional and technical					
Surveyors	0.7	230	10	70	60
Civil engineers	1.0	190	<10	60	50
Architects	0.8	90	<10	40	20
Other professional & technical	0.6	750	30	210	180
Office based					
Non-construction prof & technical	0.7	930	40	250	230
Other non-construction office based	0.6	660	30	170	160
Total	**0.8**	**7,090**	**300**	**1,930**	**1,720**

Source: Oxford Economics/ CITB; SQW analysis. Note that the columns do not sum due to rounding.

3.6 These figures are derived from estimates, and should be treated with caution. But the key point is that **annual worker requirements are roughly double net employment growth** in the sector, as existing workers exit the industry or retire.

Skills Imperative forecasts

3.7 Separately, the Department for Education publishes labour market forecasts developed as part of the *Skills Imperative* programme[17]. For Kent and Medway, these forecasts indicate total demand (including replacement demand) of 45,000 workers in construction between 2020 and 2035l, equivalent to 2,900 openings per annum, a substantially higher estimate (albeit over a longer time period) than the Oxford Economics/ CITB forecasts. The Skills Imperative also anticipate an increase in self-employment in the sector over time, projecting forward from recent trends.

[17] DfE/ Cambridge Econometrics/ Warwick University (updated 2024), Skills Imperative: Labour market and skills projections 2020-35

4. Training and skills provision

Summary

- There were 740 construction Apprenticeship starts in 2024/25 in the Wider Area. These accounted for about 8% of all Apprenticeship starts, in line with the national average. Annual Apprenticeship achievements equate to about half the annual number of starts.
- There were around 2,500 construction further education enrolments in the Wider Area in 2023/24. Recently commissioned analysis found that around 75% of all provision was in plumbing, carpentry and electrical, with relatively small numbers in professional, associate professional and technical areas. However, there is a substantial construction higher education offer, especially at MidKent College and LSEC.
- There has been recent investment in new facilities for green skills, reflecting future need – although there is a challenge in raising employer demand given high volumes of work in *existing* technologies.
- There is a substantial volume of commercial provision, which has grown in recent years and also offers pre-employment as well as in-work training.

Introduction

4.1 This chapter looks at the supply of training and skills provision relevant to construction, considering Apprenticeships, further education, higher education and private provision. Earlier in 2025, a market assessment for the manufacturing, engineering and construction sectors was carried out covering Kent and Medway and drawing on a survey of providers: this contains a schedule of available provision. A list of current provision has also been made available by the CITB. Rather than duplicating these studies, this chapter draws on them where relevant.

Apprenticeships

4.2 In 2024/25, there were 740 Apprenticeship starts in 'construction, planning and the built environment' in the Wider Area, and 670 in Kent and Medway. The construction share of all Apprenticeships was in line with the national average, with Higher (Level 4+) and Intermediate (Level 2) Apprenticeships somewhat more prevalent than Intermediate qualifications, and with an increase in Higher Apprenticeships in recent years. The great majority of Apprenticeship starts are delivered to under 19 and 19-24 age groups:

Table 4-1: Apprenticeship starts 2024/25 (year to April)

	Dartford & Gravesham	Wider Area	Kent & Medway
Total starts	100	740	670
Construction as % of all starts	9	8	7
Intermediate	20	230	230
Advanced	20	200	160
Higher	50	280	260
Under 19	40	360	340
19-24	40	290	250
25+	10	90	80

Source: DfE. Numbers are rounded

4.3 In 2023/24 (the last full year for which data are available), there were 410 Apprenticeship achievements in the Wider Area, around half the number of starts in that year. Nationally, Apprenticeship achievement rates have fallen over time (from about 65% in 2018/19 to about half today)[18]. The CITB's recent analysis of the national Apprenticeship landscape calls for an achievement rate target of 70%, noting that Apprenticeship achievement numbers would need to be three times the current rate to keep pace with workforce demand.

Table 4-2: Apprenticeship achievements, 2023/24

	Achievements	Achievements as % of starts
Dartford and Gravesham	40	44.4
Wider Area	410	50.6
Kent and Medway	400	54.1
England	12,840	53.0

Source: DfE

4.4 As well as Mid-Kent College, EKC Group, North Kent College and LSEC, there are several non-FE construction Apprenticeship providers, including IPS International based in Medway, and CITB's National Construction College South at Erith.

[18] CITB (2025), *Construction Apprenticeships: Opportunities, Challenges, Support*

Further education

4.5 Table 4-3 sets out total enrolments in construction, planning and the built environment for 2024/25. Provision is quite strongly oriented to Levels 1 and 2:

Table 4-3: Further education enrolments in construction, 2023/24[19]

	Dartford & Gravesham	Wider Area	Kent & Medway
Entry level	100	300	300
Level 1	170	1,070	950
Level 2	70	790	940
Level 3	20	210	150
Level 4+	0	10	10
Total	350	2,500	2,310

Source: DfE, Enrolments and achievements by SSA

4.6 There are three further education providers within the Wider Area: North Kent College, MidKent College and LSEC, with EKC Group also a substantial provider across Kent and Medway.

North Kent College

4.7 The North Kent College offer is primarily provided from its campuses in Gravesend, which includes a construction centre with dedicated facilities for brickwork, painting and decorating, carpentry, plumbing, electrical installation and multitrades, with some additional provision offered at Hadlow and Tonbridge. North Kent College also has a specialist refrigeration and air conditioning facility at Gravesend, to support entry into those activities and heat pump installation.

MidKent College

4.8 MidKent's construction provision is delivered from its Maidstone campus, offering courses in carpentry and joinery (L1-3), bricklaying (L1-2), electrical installation (L1-2), multitrade skills (L1), painting and decorating (L2 apprenticeship) and plumbing (L1-3). The College also has a substantial higher education offer through University Centre Maidstone, which is predominantly focused on construction-related qualifications. These include L4 Apprenticeships in building design, construction design and quantity surveying; and HNC and

[19] Note that: a) 'enrolments' count enrolments for every learning 'aim' in the period. Learners may be enrolled against more than one aim, so will be counted more than once in these data; b) data are rounded, and small numbers are suppressed (so there are likely to be more enrolments for Level 4+ than stated, since in most cases the actual numbers are below 10).

HND courses in building services engineering, civil engineering, construction management and quantity surveying.

4.9 At the end of 2024, a new Green Construction Skills Centre opened at the Maidstone campus, funded through the Local Skills Improvement Fund, and focused on the installation of energy efficient heating systems, insulation and smart building technologies. It is still early days for the Centre, and there is clearly strong policy support for its focus and there will be rising demand over the medium to long term. However, the College noted that there have been challenges in raising short-run demand, especially from employers and people already in the workforce seeking to upskill: while there is a recognition of the need to adapt to new technologies in general terms, it was noted that very high current demand for work with *existing* technology dampens engagement. Promoting the facility to employers was highlighted as a high priority[20].

LSEC

4.10 London South East Colleges Group (LSEC) is the main further education provider in Bexley, Bromley and Greenwich, operating from seven campuses. It offers courses in electrical installation (L1-3), green skills (heat pump and solar panel installation and retrofit at L2-3), brickwork/ bricklaying (L1-2), carpentry and joinery (L1-2) and L2 apprenticeships in property maintenance and demolition operations.

4.1 There is also a higher education offer at LSEC's Holly Hill campus in Belvedere. Course provision currently offered includes HNC/ HND qualifications in Building and Surveying, Building Studies and Construction Management and Quantity Surveying, accredited by the University of Greenwich.

4.2 As at MidKent College, LSEC has recently delivered a 'Green Skills Lab', with LSIF funding, focused on upskilling the existing workforce as well as new entrants in EV charging installation, retrofit, etc. and forming part of the Local London network of green skills provision. The College reported that recent work has been done to develop a programme of micro credentials: while the new Green Skills Lab is at a relatively early stage (as is MidKent's facility), there is some evidence of demand coming through.

EKC Group

4.3 EKC Group is somewhat further afield than the other three colleges, but it has a very substantial presence through six colleges in East Kent. The offer includes UK Shared Prosperity Fund supported courses at L2-L3 in retrofit and air and ground source heat pump systems offered in Folkestone and Ashford, and Ashford also hosts a specialist Plumbing and Electrical Centre.

[20] Consultation with MidKent College

Looking across the FE landscape…

4.4 The recent *Market Assessment for Engineering, Manufacturing and Construction* considered the overall range of courses offered across the further education providers in Kent and Medway[21]. Based on provider survey responses, this identified some 124 courses supporting 3,785 learners at Levels 1-7. While this analysis excludes LSEC, it illustrates the broad range. The report notes that:

- Plumbing, electrical and carpentry "dominate the provision by learner volume", accounting for about three-quarters of total learners (at all levels) in core construction.
- Learner numbers in professional, associate professional and technical subjects, such as architecture, surveying and construction management, are relatively low. The report notes the LSIP's view based on employer feedback that there is potentially a gap in provision in these areas.

Commercial provision

4.5 Beyond the FE sector, several commercial providers have an important role in the delivery of construction skills. These include:

- **The CITB National Construction College South** at Erith, one of three National Construction Colleges. This offers a range of open courses, including an L2 Apprenticeship in scaffolding, and a series of CISRS scaffolding short courses.
- **O'Halloran and O'Brien Training Academy**, operated by a groundworks, civils and concrete structures contractor in Gravesend. OHOB offers an extensive range of short courses for NPORs and CSCS card accreditation and NOCN accredited courses. It also offers pre-employment courses to encourage people into the industry, including a two-week 'bootcamp' funded by Ebbsfleet Development Corporation focused on steel fixing, form work, plant and groundworks. In consultation, one stakeholder commented favourably on OHOB's offer, noting that bootcamp-type courses are often developed without meaningful employer involvement, but that OHOB had been successful in both engaging with employers and generating interest among residents.
- **Gravesend Skill Centre** in Northfleet, supported by FM Conway, offering site safety tests and training and L2 diplomas in construction operations, formwork, steel fixings and specialist concrete operations, as well as a pre-employment bootcamp.

[21] Gravesham BC/ Industry4Council [Technical Professional Education Ltd/ Wharf Consulting Ltd/ Invicta Analytics (2025), *Kent and Medway Market Assessment for Manufacturing, Engineering and Construction*

- **CST Training** in Dartford, offering Site Environmental Awareness Training Scheme (SEATS) courses (short CITB-sponsored courses for supervisors and managers) and other refresher training.
- **Able Skills** in Dartford, offering courses from entry level to L2 in electrical, gas, plumbing, carpentry, tiling, plastering and decorating.

5. Perspectives on an additional offer

Summary

- Stakeholders were in general terms supportive of a new skills training offer at Ebbsfleet, with the main focus on developing new approaches to Apprenticeship training, with a view to increasing participation and reducing the attrition rate.

The challenge of developing new talent…

5.1 There will be significant demand for construction labour over the next few years. Estimates based on the CITB's construction workforce outlook anticipate over 1,900 new workers per annum in the Wider Area (and about 300 in Dartford and Gravesham), both to keep pace with net growth and to replace existing workers as they leave the industry. At the same time, changing regulation and technology will drive demand for upskilling and reskilling, and much recent investment is focused on addressing this.

5.2 In purely quantitative terms, the supply of new entrants to the market does not appear to be excessive relative to potential demand: compare c.300 new annual job openings in Dartford and Gravesham with about 40 annual Apprenticeship achievements, especially in the context of likely rising demand in London and elsewhere in the Greater South East. Stakeholders also noted the long-term need to address the ageing of the workforce, which is likely to become increasingly challenging:

> *"There's a view from the sector that the workforce is getting older and it's hard to attract talent in"*
>
> *"Most schemes to attract new people into the industry are short term – but we need to continue the momentum over time"*
>
> *"We need to get industry to deliver… the biggest challenge is tutor shortages making it difficult to deliver training"*

… and the potential offer in a new facility

5.3 In this context, consultees made a number of observations about the 'gap' that a new skills training facility at Ebbsfleet could fill. These tended to concentrate on Apprenticeships in particular:

- First, **it ought to be a route to piloting new forms of delivery.** For example, the prospect of 'fast track' or alternative format Apprenticeships was raised as a way of addressing the current high attrition rates and providing a different offer to the market. This could potentially involve tuition in concentrated multi-day blocks (the example offered by Skills Centre London – with which the OHOB Training Hub and Gravesend Skills Centre are associated – was highlighted).

- Linked with this latter point, **complementarity with the existing private sector offer will be important.** This obviously applies to the FE offer as well, which delivers a very substantial share of Apprenticeships, but the point was that there ought to be scope to add to and build on 'industry-owned' provision, especially in trying to engage with more employers

- There were few observations on **specific trades** on which a new facility might be focused. However, it was noted that there could be a case for focusing on those areas of activity that especially lack training provision because the composition of employment is so strongly oriented to micro businesses. Roofing was highlighted as an example of a segment that is under-served at present, but where demand is growing and there are potentially strong links to the net zero/ decarbonisation agenda.

- Aside from Apprenticeship delivery, **flexible and accessible short course** provision was highlighted, with an easily accessible hub in Ebbsfleet potentially providing a focal point for CSCS tests, etc. One consultee whose firm mainly sends employees elsewhere in the UK for ongoing training commented on the potential value that they might gain from having a closer offer.

Building a clearer understanding of the gap and the potential

5.4 While respondents were positive about the potential of a skills training hub at Ebbsfleet, some were limited in their view of demand, since direct interaction with any new facility is more likely to with subcontractors rather than housebuilders themselves. It would be helpful as the proposal is developed further to consult with a number of subcontractors. It may also be useful to consult again with training providers (in the public and private sectors) when there is an outline proposal to test.

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