

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

South East Report - April 2019





Study prepared by BMG Research from a commission by CITB.

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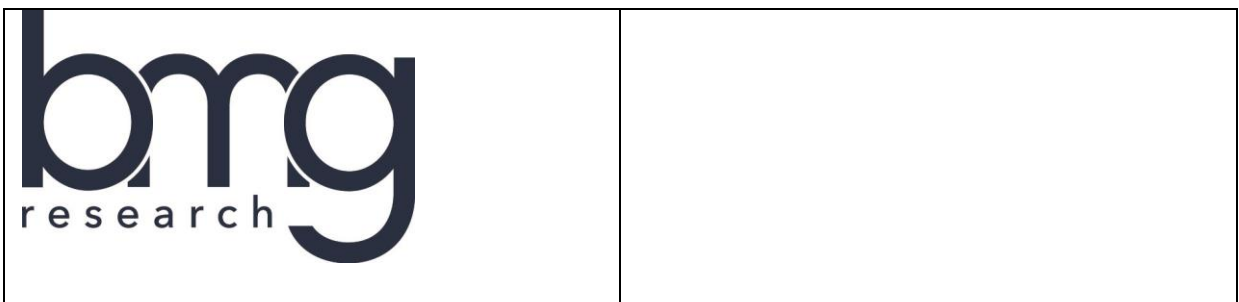




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Executive summary

Introduction

- CITB commissioned BMG Research to undertake the 2018/19 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 4048 construction workers undertaking manual roles on sites across the UK and 403 interviews were conducted with construction workers in the South East region.

Profile of the sample

- All but 1% of construction workers are male. Over two-fifths of the construction workers interviewed in the South East are aged under 35 (44%), which is a higher proportion than the UK population as a whole (36%), but similar to the UK average in the survey (45%). Just 5% of construction workers are aged 60 or over.
- Overall, 10% of the South East construction workforce is of BME ethnic origin, compared with 11% in the South East population as a whole. The UK average in the survey is 6% (compared with 15% of the UK population as a whole).
- By trade/occupation, the highest proportion of the South East sample is accounted for by labourers/general operatives (14%), site managers (12%) and carpenters/joiners (11%). There has been a decline in the proportion of labourers/general operatives and bricklayers since 2007 (the former declining from 21% in 2007 to 20% in 2012 to 19% in 2015 and 14% in 2018/19; the latter from 16% in 2007 to 11% in 2012, rising slightly to 13% in 2015 before falling to 6% in 2018/19).
- A third of all those interviewed in the South East perform a supervisory or management role on their site (34%); a slightly higher proportion than in 2015 (29%) and compared to the UK average in 2018/19 (30%).
- More than two-fifths of construction workers interviewed for the survey in the South East are employed directly by a company (44%), which is a lower proportion than the UK average (of 49%). A similar proportion of workers in the South East are self-employed (45%) and this is close to the UK average (of 43%). Since 2015 there has been a decrease in the proportion that are directly employed (from 53% in 2015) and an increase in the proportion that are self-employed (from 38% in 2015). Just 9% of construction workers in the South East work for an agency, which compares with 7% nationally and 8% within the South East in 2015.
- The likelihood of being directly employed decreases with time spent working in construction, from 59% of those that have worked in construction for less than a year to 43% of those that have been working in the industry for 5+ years.
- A third of construction workers in the South East (34%) are employed on a temporary rather than permanent basis. This is a higher proportion than the UK average (28%). By occupation,



the proportion is highest amongst bricklayers (71%) plant/machine operatives (56%) and electricians (45%) and lowest amongst scaffolders (24%) and site managers (17%).

- More than 3 in 5 construction workers in the South East work between 40 and 49 hours per week (65%, compared with a UK average of 60%), and 3 in 10 work more than 50 hours per week (30%), which is higher than the UK average (23%).

Work history

Time in the sector

- A third of South East construction workers have worked in the industry for at least 20 years (32%), which is the same as the UK average. Around three-fifths have done so for 10+ years (57%).
- More than three-fifths of construction workers in the South East have only ever worked within the construction industry (62%), slightly fewer than in 2015 (65%), and fewer than the UK average in 2015 (67%). More than half of the South East's construction workers (55%) have worked pretty much continuously, without spells out of work, and this is a similar proportion to that across the UK (56%).

Previous non-construction jobs

- Amongst the 3 in 10 construction workers in the South East that worked in another sector prior to starting work in construction (29% of all workers), the sector worked in beforehand is most likely to have been manufacturing (33%), closely followed by wholesale and retail/repair of motor vehicles (29%).
- In terms of the job roles that construction workers previously held in other sectors, the highest proportion worked in associate professional and technical occupations (49%), followed by managerial occupations (26%).

Occupational switching within the construction sector

- Nearly half of all construction workers in the South East (46%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is higher than in 2015 (37%) and compared to the UK average in 2018/19 (36%). The proportion that has worked in more than one role is higher amongst those with Level 4+ qualifications (72%) and those in a supervisory or management role (52%).
- Workers are most likely to have previously worked as a labourer/general operative (35%), while 1 in 7 have worked as a carpenter/joiner (15%).
- Thinking about their future plans in the construction sector, just over 8 in 10 construction workers in the South East would like to carry on in the same trade or occupation (84%), while 1 in 12 would like to change their trade/occupation (8%) and a further 3% would like to leave construction altogether. The proportion that wants to carry on as they are is slightly higher in the South East than the UK average (80%).



- The most popular occupation to which construction workers in the South East would like to change is site manager (41% of those who would like to change).
- Nine in ten construction workers in the South East that would like to change trade/occupation (91%) believe they will require further training or qualifications in order to do so. This is a higher proportion than the UK average (87%).
- The main reason for wanting to change trade/occupation is the belief that work will be better paid (69%), followed by wanting the opportunity to use their skills/abilities better (44%) and the belief that it will involve less physical work (38%).

Qualifications and skills

Skills cards/certificates

- Most construction workers in the South East, as across the UK as a whole, hold some form of construction skill card or certificate (98% cf. 98% in 2015, 96% in 2012 and a UK average in 2018/19 of 97%).
- Within the South East, there has been considerable improvement in the propensity for younger workers and those who have worked in construction for less than a year to hold a skill card/certificate since 2007 but this has stabilised since 2015, and these workers remain less likely than older and longer established workers to do so.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (87% in the South East; 85% across the UK).
- Card colours vary by age and particularly by occupation; younger workers are more likely to hold Red Trainee cards (43% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue cards (40% of 45+ year olds); labourers/general operatives are most likely to hold Green cards (88%); and plant and machine operatives (61%) are most likely to hold Blue cards.

Construction-specific qualifications

- Seventy-nine per cent of construction workers in the South East say they had no formal qualifications when they first started working in the construction industry. This is higher than the UK average (72%).
- By current trade/occupation, the proportion of workers that started their construction careers with no formal qualifications is highest amongst scaffolders (90%) and labourers/general operatives (84%).
- Compared with a fifth of construction workers in the South East that had qualifications when they first started working in construction (21%), more than three-quarters of all construction workers in the region now hold some sort of construction related qualification (77%, compared with 58% in 2015 and a UK average in 2018/19 of 72%).
- Within the South East, the proportion of workers that currently hold any qualifications is lower than average amongst workers who have worked in construction for less than 2 years (50% amongst those that have worked in construction for less than a year; 45% where it has been



between 1 and 2 years), while agency workers are less likely than average to hold any qualifications (53%).

- By trade/occupation, proportions vary from all bricklayers to the majority of electricians and plant/machine operatives (both 94%) down to just two-fifths of labourers/general operatives (39%).
- The qualifications most likely to be held by construction workers in the South East are NVQ/SVQ qualifications (61% of those with qualifications) while 1 in 8 construction workers in the region with qualifications hold City & Guilds qualifications (13%). Just 3% of construction workers with qualifications now hold an apprenticeship.

Basic skill needs

- One in ten construction workers in the South East believe they would benefit from some form of training in basic skills (10%), which is a lower proportion than in previous years (14% in 2015 and 20% in 2012) but similar to the UK average in 2018/19 (11%).
- In terms of the type of training required, there is an almost even split across reading, writing, and speaking English with just 3% identifying a need for further training in Maths.

Current study for qualifications

- One in seven construction workers in the South East are currently working towards formal qualifications relevant to the construction industry (15% cf. 10% in 2015, 9% in 2012 and a UK average in 2018/19 of 15%). This proportion is higher amongst 16 to 19 year olds (53%) and amongst those who have worked within the construction industry for less than a year (41%).
- Amongst workers with no qualifications, 11% are currently working towards a qualification.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role, more than two-fifths are certain that they would not like to do so (43%), a lower proportion than across the UK (51%), while nearly two-fifths would like to do so (38%) and a sixth are unsure (18%).
- Two in five construction workers in the South East (39%) and just over 4 in 5 of those who have had some form of supervisory or management responsibilities (81% cf. 73% in 2015 and 55% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions compare with 34% and 81% respectively across the UK.
- SMSTS (Site Manager Safety Training Scheme) is more frequently mentioned as the type of training received (43%), followed by Site Safety Supervisors Courses (41%) and in-house training (31%).

Overall skill levels

- The vast majority of construction workers in the South East (99%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. A fifth of the South



East's construction workers (19%) hold a skill card/certificate but have no other construction qualification. This compares with a higher UK average of 22%.

- Overall, nearly two-thirds of the South East's construction workers that provided a response have qualifications equivalent to Level 2 or above (64% cf. 56% in 2015 and 59% across the UK in 2018/19).

Geographic mobility

Work history in the region/nation

- That their employer sent them there (53%) or the fact that they grew up there/have always lived there (33%) are the most likely reasons why construction workers are based within the South East. A higher proportion state that it is because their employer sent them there in 2018/19 than in 2015 (44% in 2015) and this reflects the UK-wide picture.
- Around a third of construction workers in the South East have worked within their current region for their entire construction career (32%) and this is a similar proportion to 2015 (35%), but lower than the UK average in 2018/19 (44%). The majority of construction workers in the region have remained in the South East for all or most of their career (61%), but this is a lower proportion than the UK average of 77%.
- Three-fifths of construction workers in the South East (62%) were also based in the region for their last job and this proportion is higher than in 2015 (56%). Compared with other regions/nations, workers in the South East are amongst the least likely to have last worked in the same region as they do now.

Worker origins

- Overall, around half of all construction workers in the South East were interviewed in the same region they were living in when they started their construction career (51% cf. 55% in 2015). There are considerable variations in the extent to which workers have remained in their original locality, with the proportion being highest in Scotland (96%) and Northern Ireland (95%) and lowest in the East of England (44%). Workers in the South East are amongst the least likely to have started their careers in the same region as they work in now.
- Two-fifths of construction workers in the South East (41%) have remained in the same region in which they did their first qualification/training. Compared with other regions/nations, workers in the South East are the least likely to have done so; the highest proportion by region/nation being within Scotland (96%).

Travel to site

- Nearly half of construction workers in the South East have travelled at least 50 miles from their permanent/current home to work in the last 12 months (48%). South East's construction workers are on a par with the UK average in terms of their propensity to have travelled more than 100 miles from their permanent home to work in the last 12 months (17%).



- Overall, 7% of construction workers in the South East (6% in 2015) are currently staying in temporary accommodation while working at their site. This proportion is slightly higher than the UK average (5%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 27 miles (18 miles being the UK average) which is the same as in 2015.

Site duration and change

- More than two-fifths of temporary workers in the South East (43%) do not know how much longer they can expect to be working for their current company/agency. This compares with a UK average of 38%.
- When all respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase, a quarter expect to stay on that site for a year or longer (24% cf. UK average of 18%), which is lower than in 2015 (29%). One in ten workers do not know how much longer they can expect to be on site (9% cf. 22% in 2015), indicating less uncertainty than in the last 3-4 years.
- Nine in ten South East construction workers are confident that, when they finish their current job, their next job will allow them to travel to work from their permanent home on a daily basis (90% cf. 77% in 2015 and 69% in 2012). This is a higher proportion than the UK average in 2018/19 (84%). The remaining 10% say it depends/they don't know or that they won't be able to commute.

Sub-sector and sector mobility

Sub-sector mobility

- As in 2015, the vast majority of construction workers in the South East have been working on new housing (81% cf. 84% in 2015). For all other types of projects, the proportion of construction workers that have worked on them has increased since 2015.
- Overall, just over under a quarter of all construction workers in the South East have only worked on one project type (23%), which is a lower proportion than in 2015 (47%) and lower than within other regions/nations (UK average is 30%).

Leaving the sector

- In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Amongst construction workers of all ages in the South East, just under half say they definitely will be (47% cf. UK average of 48%); a further third think it is very or quite likely (37%); 3% consider it unlikely; 3% say they definitely won't be, and a further 6% hope to be retired by then, while 4% don't know.



Introduction

Aims and objectives

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

The primary aim of this project is to provide robust and reliable information from site-based workers across the UK construction industry on their qualification levels and the extent of both occupational and geographic mobility. This work will ultimately provide an evidence-base that has the potential to provide a common currency for subsequent skills planning, particularly in respect of profiling the existing workforce and offering insight into where gaps might emerge as a result of occupational/geographic movement. The final data and findings will be used to ensure that everyone in industry, government, training providers and others know exactly what we will need to continue to develop as an industry.

The specific objectives of this research project were to:

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

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

Method

The 2018/19 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2015. Overall, 4048 interviews with construction workers in manual roles across the UK were completed, split between the 12 standard regions/nations. In total, 403 interviews were conducted in the South East.



Sampling

This sub-section provides an overview of the sampling methodology employed for the 2018/19 Construction Workforce Mobility Survey: further detail is provided in the technical report that accompanies this analytical report.

Although this survey focuses on the mobility of individual workers, the sampling strategy was to select construction projects (generally referred to in this report as 'sites') with sufficient workers on-site each day to enable a minimum of 10 interviews. This site-based approach was employed to ensure cost-effective face-to-face interviewing, comparable to that used in the 2015 survey.

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

Project eligibility criteria:

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

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

Telephone-based site recruitment

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

Site visits

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



Interviews were completed using Computer Assisted Personal Interviewing (CAPI) techniques as well as self-completion techniques.

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

The following table shows the number of interviews achieved in each region/nation. In order to obtain strong bases for regional/national analysis, a quota of 400 completed questionnaires per region/nation was set, with an allowance of +/- 50 interviews per region/nation. However, at the analysis stage weighting factors were applied to survey data to ensure that for national analysis, regions/nations were represented in their correct proportions according to the size of the construction workforce as reported in the Annual Population Survey via Nomis for economically active adults aged 16+ in October 2017 – September 2018.

Figure 1: Interviews and weights by region/nation

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

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

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

Notes on reading this report

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

The base for statistics is described under each figure (table or graph) heading, with the base counts (unweighted) on dedicated rows of tables. Where tables include statistics on many different bases, the unweighted bases for 2018/19 data are shown in brackets.

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



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

Analysis by region/nation should be read with caution, particularly those on bases further restricted by the routing out of some respondents. Unweighted bases are shown throughout for guidance.

South East is referred to by the abbreviation 'SE' in tables.

Profile of construction site workers

This first section of the report provides a profile of construction site workers interviewed in the 2018/19 survey and where possible makes comparisons with 2015. The section examines:

- Personal demographics, including gender, age, ethnicity, nationality (including length of time that workers have been resident in the UK) and disability;
- Current occupation;
- Employment status i.e. whether employed directly, self-employed or by an agency;
- Employment contract basis i.e. whether working on a temporary or permanent basis.

The section then moves on to examine career histories, including:

- The number of years respondents have worked in the construction industry;
- Pre-construction employment histories;
- Occupational switching and progression within the construction sector.



Personal demographics

Figures 2 and 3 detail the demographic profile (gender, age, ethnicity, nationality and disability) of the 2018/9 sample of construction workers in the South East compared with the 2015 survey and with official statistics from the Annual Population Survey (where comparisons are possible).

The vast majority of construction workers in manual roles interviewed in the South East were male (99%). Male dominance is greater in the survey sample than in the UK construction workforce as a whole as this survey does not include those in office-based roles within the construction industry (either administrative or professional, where the incidence of female workers is higher) and interviews were conducted on relatively large construction sites (valued at £250,000+, with at least 10 workers), thereby excluding female construction workers on small building sites and maintenance and repair.

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

	SE 2018/19	UK 2018/19		UK Workforce[#]
	%	%		%
Male	99	98	Male	53
Female	1	1	Female	47
Transgender	0	<0.5	Transgender	-
Non-binary	<0.5	<0.5	Non-binary	-
Prefer not to say	0	<0.5	Prefer not to say	-
<i>Unweighted bases</i>	<i>403</i>	<i>4048</i>		<i>32,277,500</i>

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



Within the South East, the youngest age group (16 to 24 year olds) account for a sixth of construction workers (17%), a similar proportion to that of 2015 (16%) and 2012 (19%). Compared with 2015 there is a lower proportion of workers aged 25 to 34 years (28% cf. 34%), while the proportion of workers aged 35 to 44 is similar to 2015 (24% cf. 23%) and a slightly higher proportion to 2015 are aged 45 to 54 years (19% cf. 17%). The proportion of workers aged 55 and over is higher than in 2015 (12% cf. 9%). Workers aged 60 and over account for just 5% of construction workers, which is similar to 2015 (4%).

Compared with the UK construction workforce overall, there is a similar proportion of construction workers are aged under 35 years within the South East (44% in the South East; 45% across the UK cf. 36% of economically active adults across the UK).

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

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %		UK Workforce* %
16 to 19 years	4	3	5	5	5	16 to 19 years	4
20 to 24 years	13	13	14	11	12	20 to 24 years	9
25 to 34 years	28	34	30	30	28	25 to 34 years	23
35 to 44 years	24	23	23	26	23	35 to 49 years	33
45 to 54 years	19	17	16	19	20	50 to 64 years	27
55 to 59 years	7	5	11	10	7		
60+ years	5	4			4	65+ years	4
<i>Unweighted bases</i>	403	439	420	331	4048		32,277,500

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

In terms of ethnicity, the vast majority of construction workers in the South East are of White origins, consistent with 2015 (90% cf. 90% in 2015) but lower than in 2012 (95%).

Workers of Black (4%) and Asian (3%) ethnic origin (BME) make up similar proportions of the sample as in previous years.



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

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %	UK Population aged 16-64* %
White	90	90	95	96	94	85
Black	4	2	1	3	2	3
Asian	3	2	1	1	2	6
Mixed	2	-	-	-	1	1
Other/Not stated	<0.5	6	3	0	1	4
<i>Unweighted bases</i>	403	439	420	331	4048	41,217,200

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

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

Compared with the South East population as a whole (aged 16-64), a similar proportion of South East construction workers are of BME origins (10% cf. 11% amongst the South East population and 15% of the UK population).

Compared with other regions/nations, the South East has the second highest proportion of construction workers that are of BME origin after London.

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

Base: All respondents

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

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



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

Three-quarters of construction workers in the South East (75%) originated from the UK and the remaining 25% originated from another country. Romania accounts for 7% of construction workers in the South East, while India accounts for 3%. No more than 1% of construction workers originate from another single specified country. One in eight construction workers in the South East (13%) originate from an EU country other than the UK.

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

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

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

Around 1 in 5 construction workers in the South East (19%) hold a passport for another country. This compares with a UK average of 14%. The majority hold a UK passport (79%), with a further 2% reporting that they do not have a passport. Of those with a non-UK passport, more than four-fifths (84%, equating to 16% of all South East construction workers) state that it is an EU member state passport.

Of those construction workers in the South East that were born outside of the UK or have a non-UK passport, 12% have British citizenship, which compares with a UK average of 14%.

Overall, around three-quarters of South East construction workers have lived in the UK all of their life (73%). This proportion is lower than the UK average (80%).

Amongst all South East construction workers, three per cent indicate that they have a long term illness, health problem or disability which limits the type of work they can do. The most common illness/disability amongst these workers is to do with reduced physical capacity, such as an inability to lift, carry or otherwise move everyday objects, debilitating pain and lack of strength, breath, energy or stamina, asthma, angina or diabetes (54%). Next most common is to do with mobility, such as a wheelchair user, artificial lower limb(s), walking



aids, rheumatism and arthritis (23%) and then hearing issues (15%). A further 8% report severe disfigurement and another 8% report mental illness. Across the UK, 3% of construction workers indicate they have a long-term illness, health problem or disability, and the most common condition is a reduced physical capacity (50%).

Occupational profile

Current job role

All workers were asked what their current trade or occupation is at their site. Respondents in a supervisory role were asked to detail their trade/occupation background, as their supervisory roles would be asked about later in the survey. Figure 7 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from previous surveys.

In 2018/19 labourers/general operatives, site managers, and carpenter/joiners are the top three occupations amongst construction workers in the South East. This reflects the profile across the UK. There has been a decline in the proportion that are labourers/general operatives since 2007 (from 21% in 2007 to 14% in 2018/19) and in the proportion that are bricklayers (from 16% in 2007 to 13% in 2015 to 6% in 2018/19) and there are fewer bricklayers in the South East compared with the UK average (11%).



Figure 7: Occupational profile

Base: All respondents '-' = not applicable

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
Labourer/General operative	14	19	20	21	16
Site manager	12	9	0	0	11
Carpenter/joiner	11	7	17	15	10
Plant/machine operative (e.g. Fork lift/JCB)	8	7	9	14	7
Electrician	8	4	7	3	6
Bricklayer	6	13	11	16	11
Ground worker	6	3	0	0	4
Scaffolder	5	5	4	4	4
Dryliner	4	5	5	w/plasterer	3
Technical	4	2	2	1	4
Painter/decorator	3	3	3	2	2
Plumber	2	5	6	6	4
Project manager	2	1	0	0	1
Pipe fitter	2	<0.5	-	-	2
Roofer	1	2	5	3	2
Glazer/window fitter	1	-	-	-	1
Supervisor/foreman	1	2	-	-	2
Contracts manager	1	<0.5	-	-	<0.5
Banksman/banksperson	1	1	1	1	1
Concrete worker	1	-	-	-	1
<i>Unweighted bases</i>	<i>403</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4048</i>



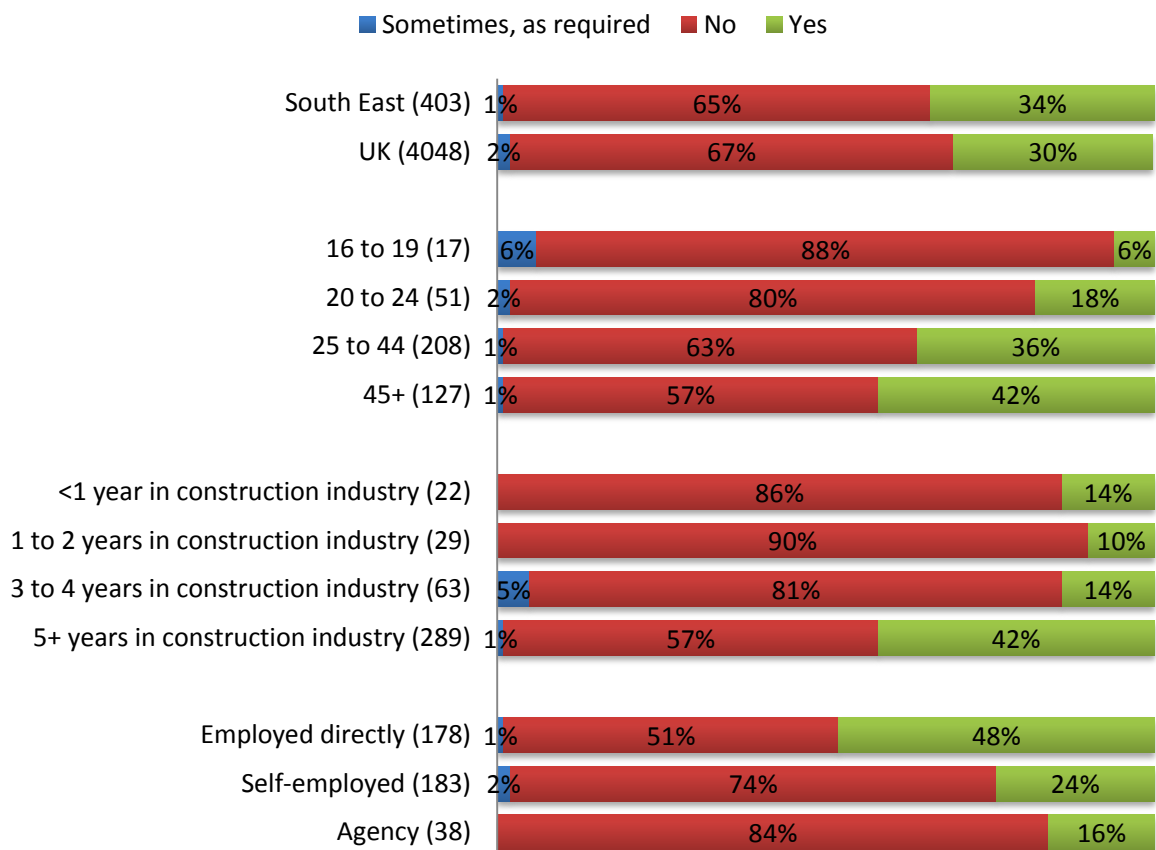
Supervisory roles

A third of all construction workers in the South East interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (34%). This is a slightly higher proportion than in 2015 (29%) and compared to the UK average in 2018/19 (30%).

The incidence of workers in a supervisory role is considerably lower amongst workers aged under 25 and amongst those that have worked in the construction industry for less than 5 years, as one would expect. Workers who are directly employed by a company (48%) are more likely than those that are self-employed (24%) or work for an agency (16%) to perform a supervisory or management role. These differences are summarised in the following figure.

Figure 8: Whether respondents perform a supervisory or management role

Base: All respondents



Unweighted bases in parentheses Q8



Employment status

More than two-fifths of construction workers in the 2018/19 South East sample are employed directly by a company (44%). This is a lower proportion than in 2015 (53% in 2015) and compared with the UK average in 2018/19 (49%).

A slightly higher proportion of construction workers in the 2018/19 South East sample is self-employed rather than directly employed (45%). This is a higher proportion than in 2015 (38%) and similar to the UK average in 2018/19 (43%).

Between 2012 and 2015, the proportion of construction workers in the region that were employed directly increased (from 30% to 53%) and those that were self-employed decreased (from 61% to 38%) but 2018/19's sample has shown a reversal of this trend.

Construction workers that have been working in the construction sector for at least 3 years are more likely to be self-employed than directly employed, while those that have been working in the sector for no more than 2 years are more likely to be directly employed.

The proportion of workers who are self-employed increases by age from 29% of 16 to 19 year olds to 44% of workers aged 25 to 44 and 50% of 45+ year olds. The proportion of respondents who are self-employed increases to 88% of bricklayers, to 60% of carpenters/joiners and to 55% of electricians. Just 9% of the sample is accounted for by construction workers who are working for an employment agency, similar to the proportions reported in 2015 and 2012 (both 8%).

Figure 9: Employment status

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	UK 2018/19 %	Years working in construction			
					<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	44	53	30	49	59	52	40	43
Self-employed	45	38	61	43	32	31	49	47
Working for an employment agency	9	8	8	7	9	14	10	9
Working on some other basis	1	1	0	<0.5	0	3	2	1
<i>Unweighted bases</i>	<i>403</i>	<i>439</i>	<i>420</i>	<i>4048</i>	<i>22</i>	<i>29</i>	<i>63</i>	<i>289</i>

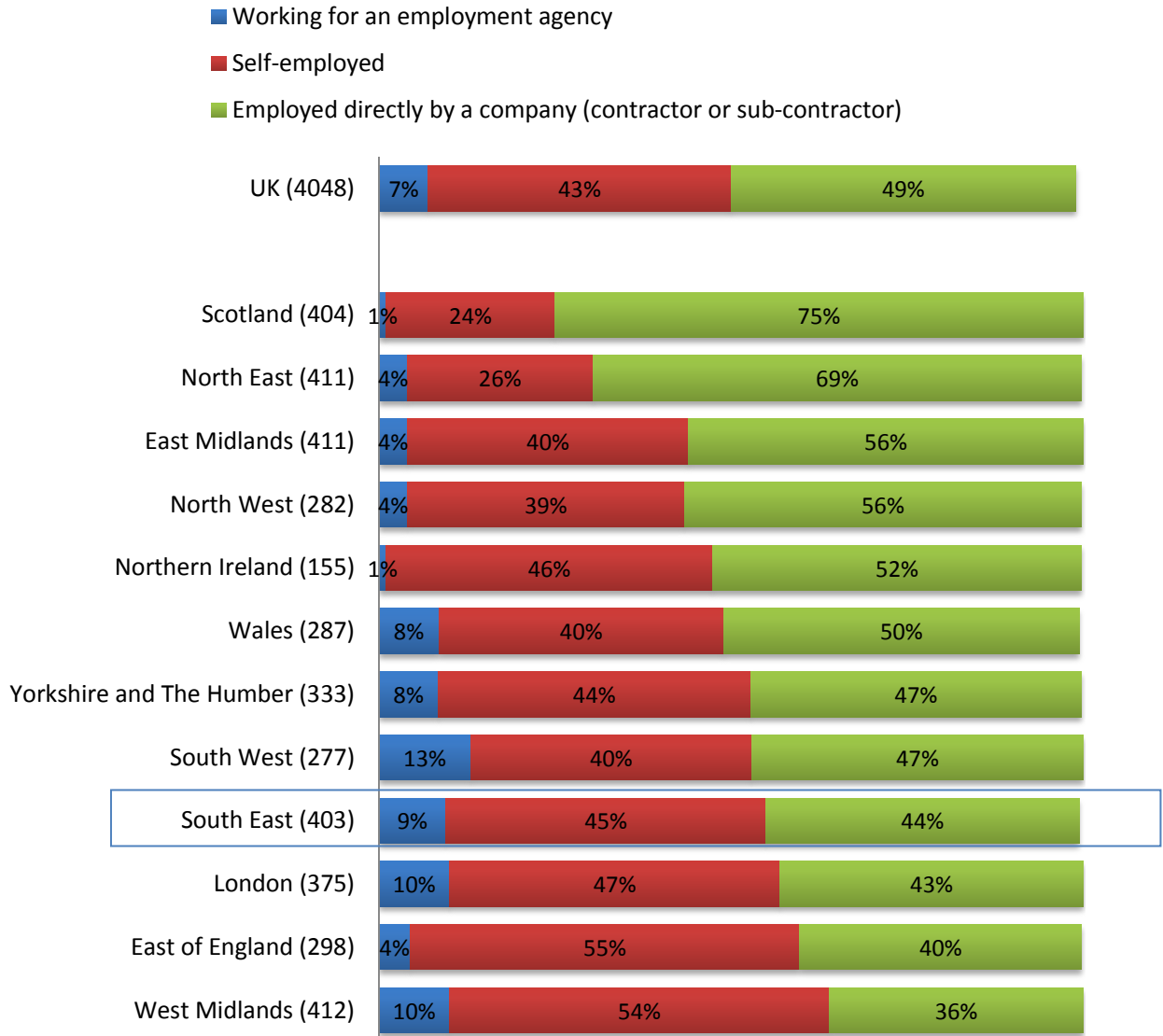
Q20



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

Figure 10: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses Q20



Employment contract basis

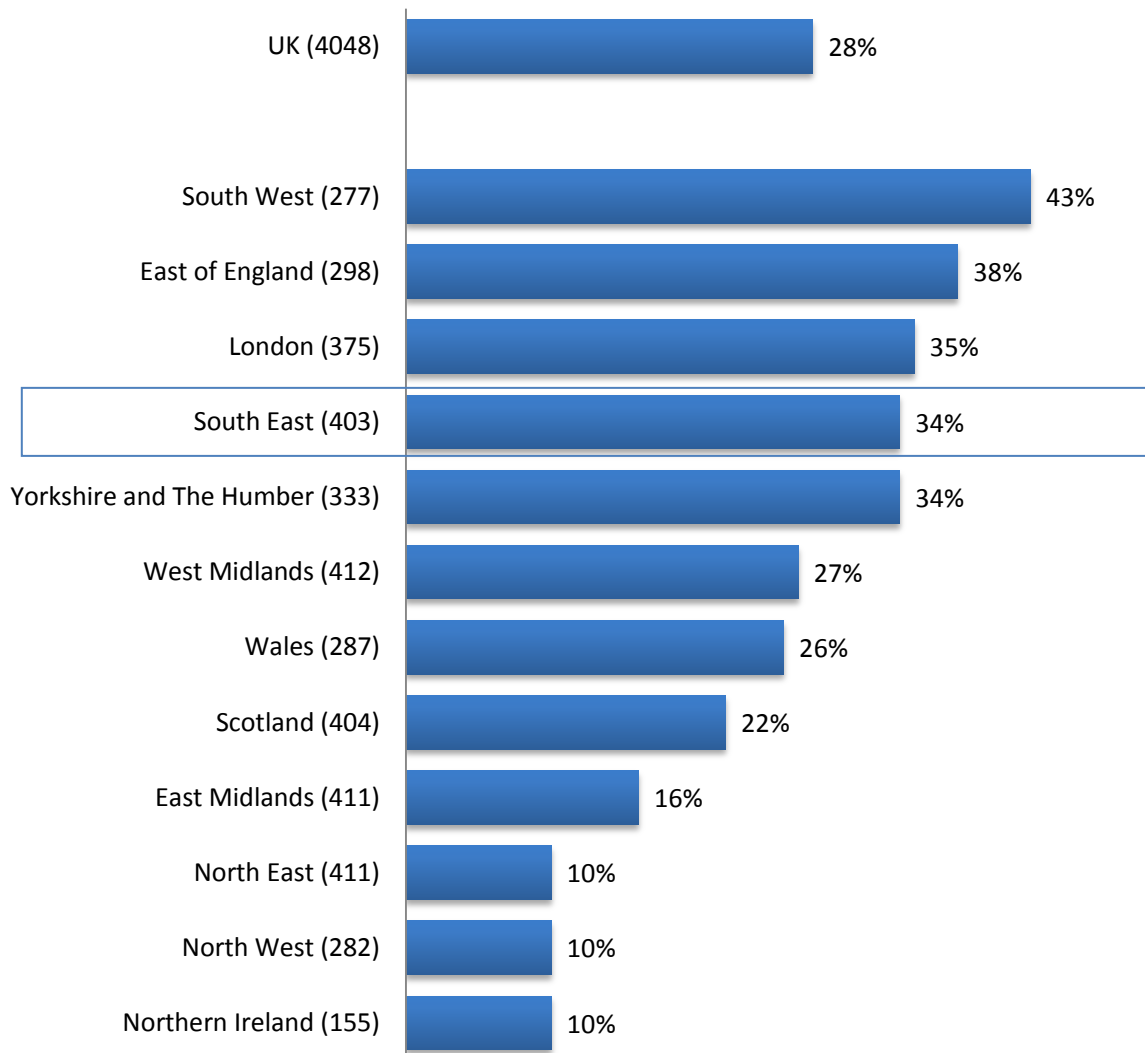
Overall, 1 in 3 South East construction workers (34%) is employed on a temporary rather than permanent basis (66%). This reflects a move towards more temporary employment in 2018/19 compared with 2015 when 1 in 6 (18%) was employed on a temporary basis.

Amongst workers who are employed by an agency, the proportion on temporary contracts is significantly higher than it is amongst those who are self-employed or employed directly (79%, compared with 50% and 9% respectively).

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

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

Base: All respondents



Unweighted bases in parentheses Q21

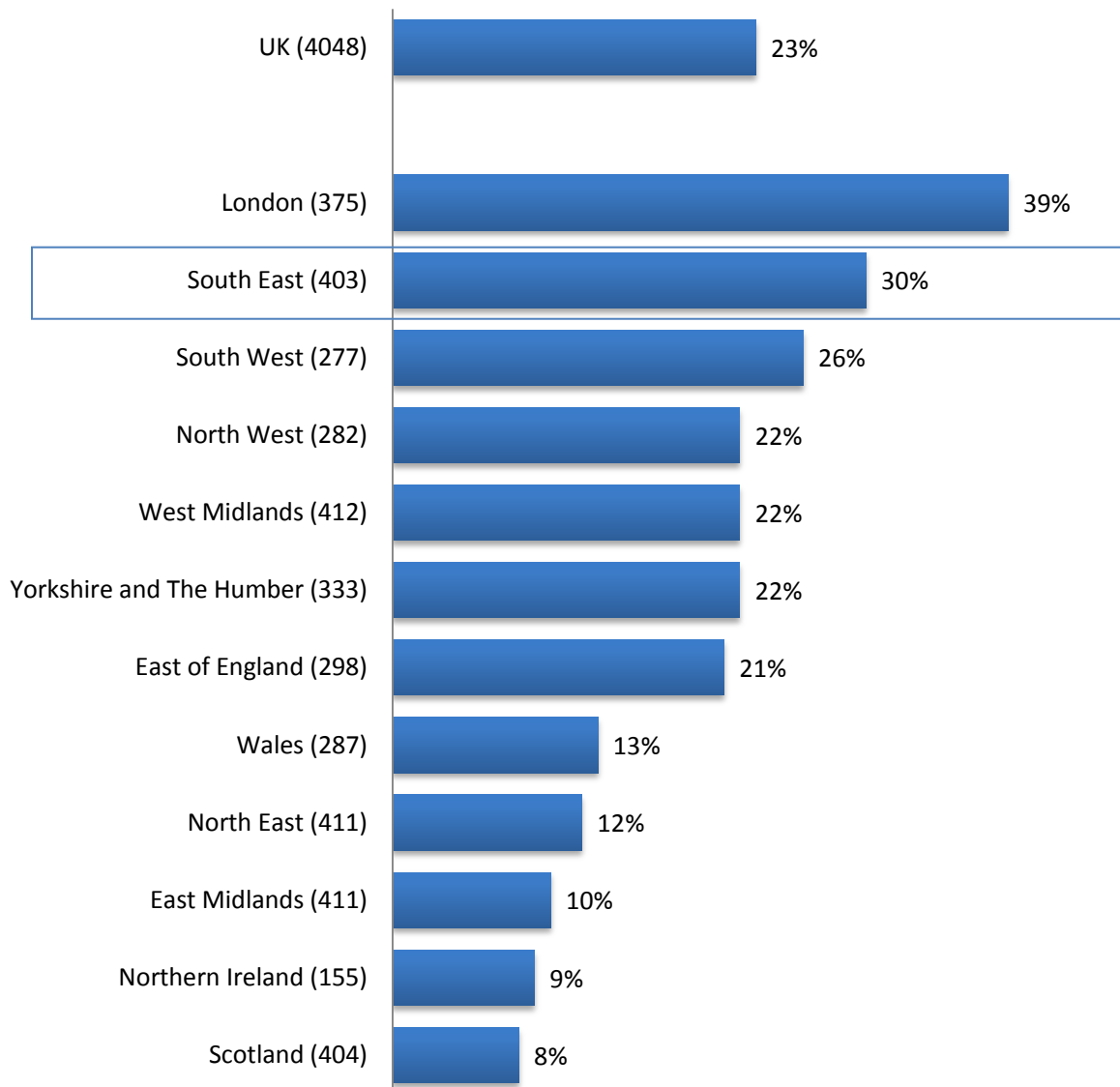


By current trade/role, the proportion working on a temporary basis is higher than average amongst bricklayers (71%), plant/machine operatives (56%) and electricians (45%) and lowest amongst scaffolders (24%) and site managers (17%).

Hours worked

Construction workers in the South East, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (65%, compared with a UK average of 60%). Three in ten (30%) work more than 50 hours a week, which is higher than the UK average (23%).

Figure 12: Proportion of workers that typically work 50 or more hours per week
 Base: All respondents Unweighted bases in parentheses



Unweighted bases in parentheses Q22



Work histories

Time in the sector

A third of South East construction workers have worked in the construction industry for over 20 years (32%) and nearly three-fifths have worked in the industry for at least 10 years (57%).

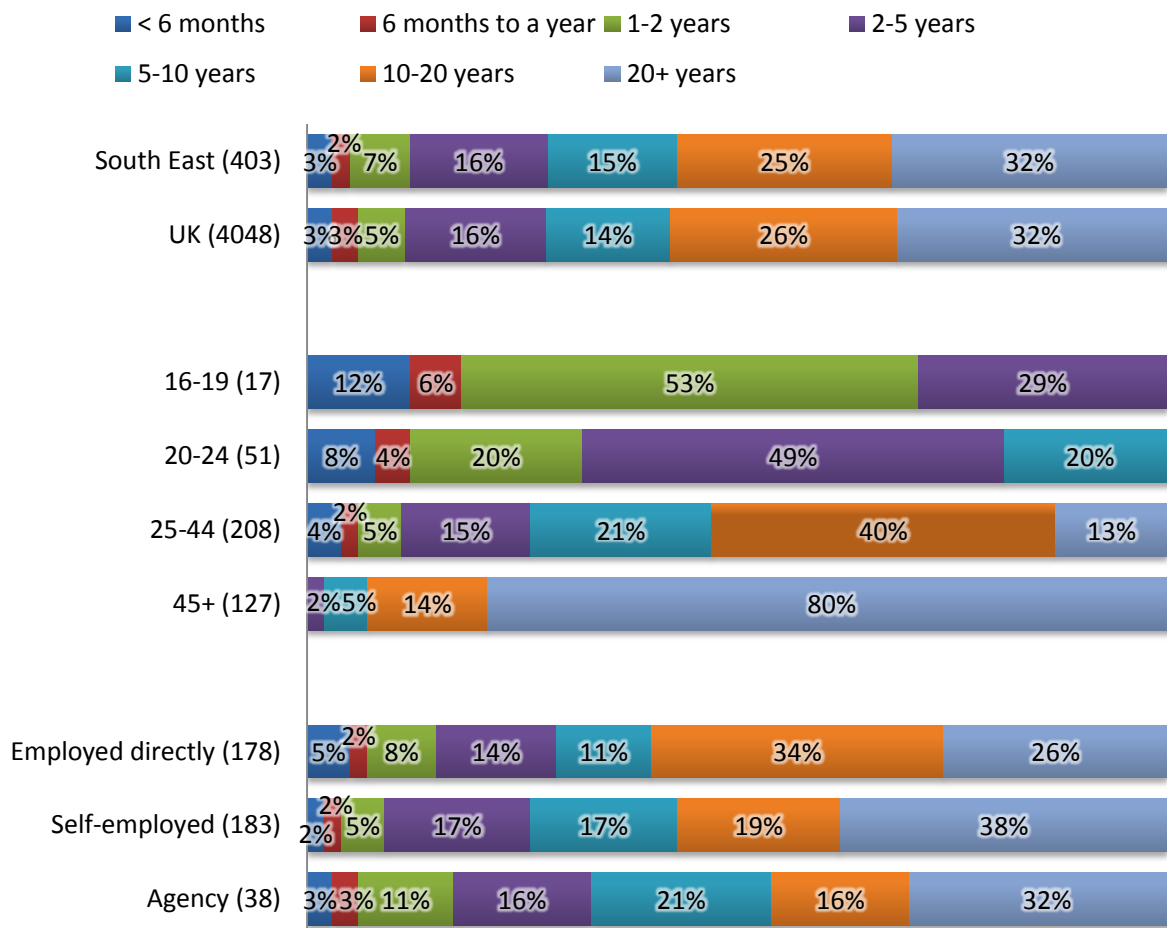
The region displays a similar profile to that of the UK overall in terms of length of time in the construction sector amongst workers.

The length of experience in the industry increases with age to the approximately four-fifths of workers aged 45 and over in the South East that have more than 20 years' experience of working in the construction sector (80%).

Figure 13: Years spent working in the construction sector

Base: All respondents

Unweighted bases in parentheses



Unweighted bases in parentheses Q1



Compared with 2015, Figure 14 shows that, in 2018/19, workers are more likely to have worked in the construction sector for more than 20 years; 32% have 20+ years' experience, compared with 28% in 2015, whilst 43% have 10 or fewer years' experience, compared with 49% in 2015.

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

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
Less than 6 months	3	3	2	3	3
Up to a year	5	8	5	7	6
Up to 2 years	13	16	11	12	12
Up to 5 years	28	28	23	27	28
Up to 10 years	43	49	45	44	42
Up to 20 years	68	71	71	67	68
More than 20 years	32	28	28	33	32
<i>Unweighted bases</i>	403	439	420	331	4048



Pre-construction employment histories

More than three-fifths of workers in the South East have only ever worked in the construction industry (62% cf. 67% across the UK and 65% within the South East in 2015). This includes more than half who have worked in construction pretty much continuously (55%); 3% for whom this is their first job; and a further 3% that have only ever worked in the construction sector, but have had spells out of work.

There is little difference by age group, although younger workers are more likely than older workers to say that this is their first job and that they have not worked in any other industry (12% of 16 to 19 year olds).

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

*All respondents * caution: small sample base*

	SE 2018/19 %	SE 2015 %	UK 2018/19 %	Age %			
				16 to 19	20 to 24	25 to 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	55	52	56	47	53	55	58
I have only worked in construction jobs but have had spells of being out of work	3	5	4	6	2	3	3
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	7	8	7	0	4	8	9
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	29	23	23	35	27	30	27
This is my first job. I haven't worked in any other industry.	3	8	7	12	4	2	3
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	2	2	3	0	10	1	0
<i>Unweighted bases</i>	<i>403</i>	<i>439</i>	<i>4048</i>	<i>17*</i>	<i>51</i>	<i>208</i>	<i>127</i>

Q2



Overall, 3 in 10 construction workers in the South East 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 (29%). This is a higher proportion than that reported in 2015 (23%).

Those who had worked in other sectors before starting their construction careers were asked to give details of what they were doing immediately before they started working in construction. In a third of cases, construction workers had previously worked in manufacturing (33%), which is a lower proportion than across the UK as a whole (45%), while slightly fewer had worked in wholesale and retail/motor vehicle repair beforehand (29%), which was a higher proportion than the UK average (19%).

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

Base: Where first job was not in construction

	SE 2018/19 %	SE 2015 %	UK 2018/19 %
C – Manufacturing	33	13	45
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	29	25	19
B – Mining and quarrying	13	-	6
A - Agriculture, Forestry and Fishing	13	5	9
Q – Human health and social work activities	4	-	1
H - Transportation and storage	3	12	6
N - Administrative and support service activities	0	2	1
<i>Unweighted bases</i>	<i>117</i>	<i>110</i>	<i>862</i>

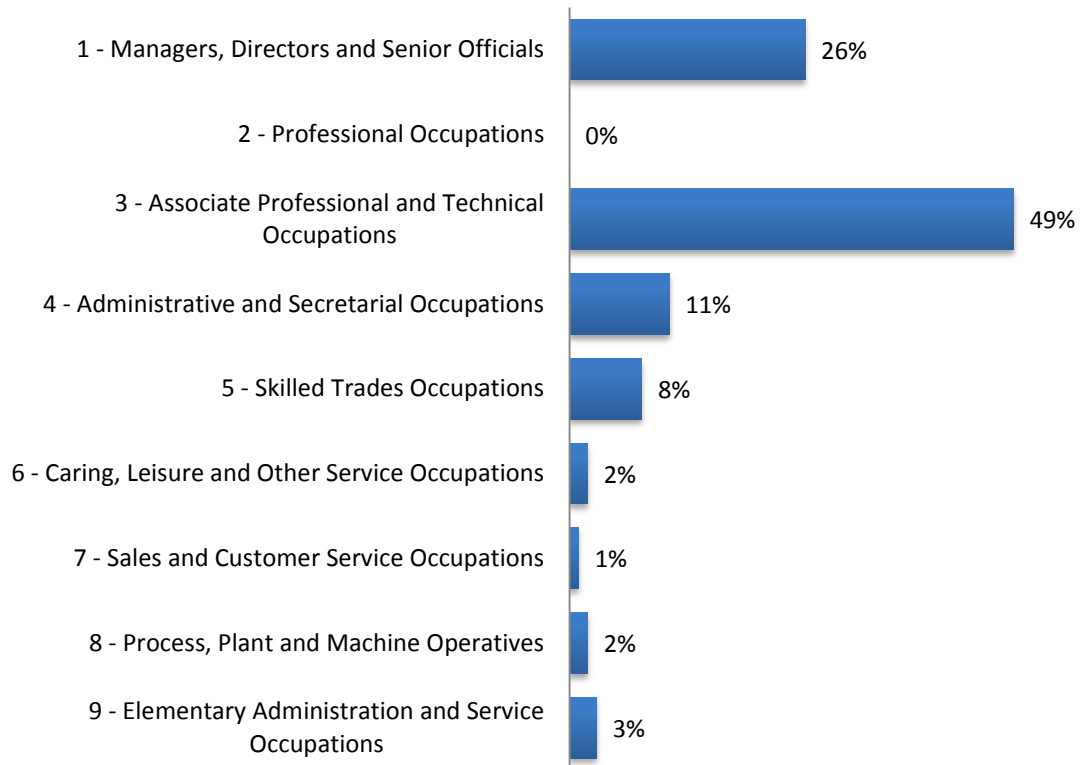
Q3

In terms of the job roles that South East construction workers have undertaken in other sectors, around half had worked in associate professional and technical occupations (49% cf. 28% across the UK) and around a quarter had worked in managerial occupations (26% cf. 19% across the UK).

Around 1 in 10 workers that had worked in other sectors had worked in administrative and secretarial occupations (11%), while slightly fewer had worked in skilled trades occupations (8%). These figures compare with 6% and 27% across the UK as a whole.



Figure 17: Job roles undertaken in other sectors
Base: Where first job was not in construction



Unweighted base = 117 Q3



Occupational switching and progression within construction

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

Overall, nearly half of all construction workers in the South East have worked in more than one construction trade or occupation whilst working in the construction industry (46%), which is a higher proportion than in 2015 and compared with the UK average in 2018/19 (37% and 36% respectively).

The proportion of workers that have had more than one role increases with age (to 56% amongst those aged 45+ cf. 24% amongst those aged 16 to 19 years).

Workers with the highest level of qualifications (Level 4 and above) are more likely to have had more than one role or occupation within the construction sector (72%), as are those in a supervisory or management role on site (52%).

As in 2015, there are also variations by current job role, with plant/machine operatives (75%), site managers (70%) and scaffolders (57%) most likely to have had more than one role/occupation within construction. Carpenters/joiners (23%), electricians (27%) and bricklayers (29%) are less likely than average to have had any other trade within the construction sector. The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector.

Figure 18: Other construction roles under taken, by current occupation

Base: All respondents

MORE likely to have had more than one role			LESS likely to have had more than one role		
	SE 2018/19 %	UK 2018/19 %		SE 2018 /19 %	UK 2018/19 %
Plant/Mach. Op. (32)	75	55	Labourer /Gen. Op. (57)	39	29
Site manager (47)	70	69	Bricklayer (24)	29	24
Scaffolder (21)	57	34	Electrician (33)	27	17
			Carpenter/Joiner (43)	23	22

Unweighted bases for 2018/19 South East in parentheses

Q6



Respondents who have worked in other roles/occupations within the construction industry, other than the role they are currently in, were asked to specify which trades/occupations they have previously worked in, with each respondent able to list all previous occupations. Figure 19 summarises the previous trades/occupations most frequently listed by those who have worked in other roles in the construction sector.

Workers are most likely to have previously worked as a labourer/general operative (35%) while 1 in 7 workers has previously worked as a carpenter/joiner (15%) and 1 in 10 as a plasterer (10%) or bricklayer (9%).

Figure 19: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	SE 2018/19	UK 2018/19
	%	%
Labourer/General operative	35	34
Carpenter/joiner	15	19
Plasterer	10	8
Bricklayer	9	12
Plant/machine operative (e.g. Fork lift/JCB)	8	10
Painter/decorator	8	7
Electrician	7	5
Roofer	6	8
Site manager	6	5
Ceiling fixer	6	5
Floorer	5	4
Scaffolder	5	4
Plumber	5	5
Banksman/Banksperson	4	6
Ground worker	4	5
Dryliner	3	8
Pipe fitter	3	4
Technical e.g. surveyor, maintenance technician	3	3
Contracts manager	3	1
Steel erector/rigger	2	4
Welder	2	2
Supervisor/foreman	2	1
Tilers	2	1
Mechanical fitter	1	1
Glazer/window fitter	1	1
Concrete worker	1	<0.5
Other	9	7
<i>Unweighted base</i>	<i>181</i>	<i>1328</i>

Q7



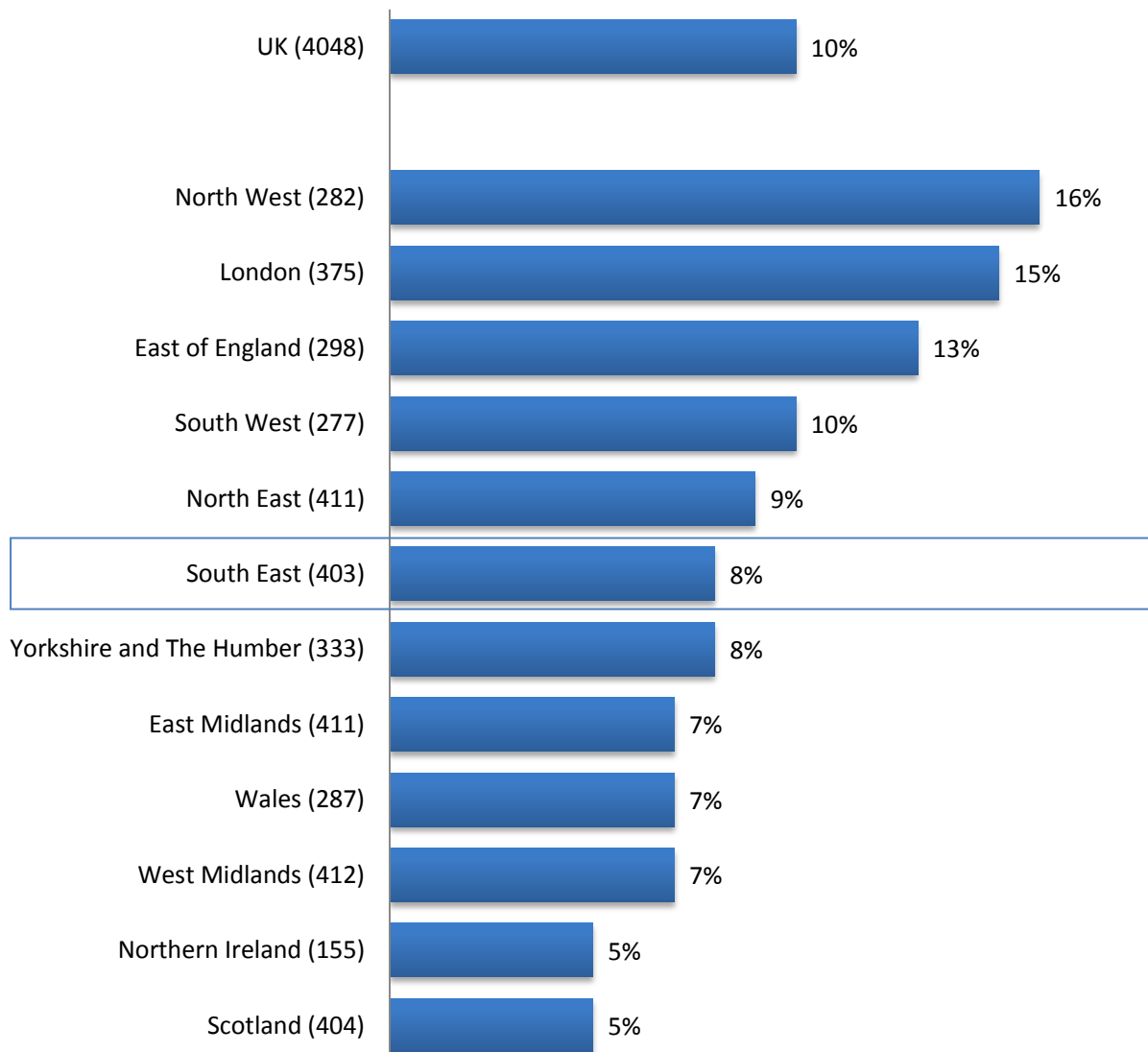
Future career plans

Thinking about their future plans in construction, more than 8 in 10 construction workers in the South East would like to carry on in the same trade or occupation (84%); 1 in 12 would like to change their trade/occupation (8%); and just 3% would like to leave construction. The remainder (5%) are not sure.

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

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

Base: All respondents



Unweighted bases in parentheses Q33



Construction workers aged 20 to 24 years are more likely than those in other age groups to want to change their trade or occupation (14%). Older workers are more likely than average to want to carry on as they are (90% of 45+ year olds).

By current trade/occupation, those working as bricklayers (96%), scaffolders (95%) and site managers (94%) are more likely than average to want to carry on as they are.

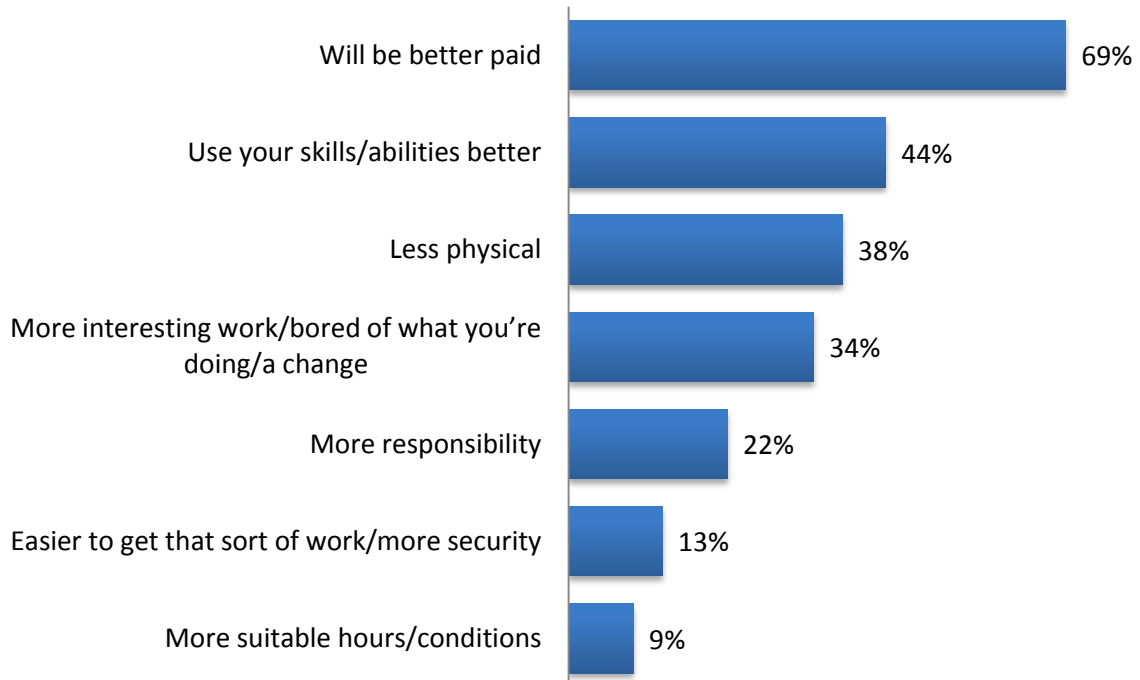
Amongst those who would like to change trade or occupation, a wide range of alternative trades/occupations are mentioned. However, the highest proportion overall would like to be a site manager (41%).

In 9 in 10 cases where construction workers in the South East would like to change trade or occupation, they believe they will require further training or qualifications in order to do this (91%). This is a higher proportion than in 2015 (73%) and compared with the UK average in 2018/19 (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (69%), while more than two-fifths wants to use their skills/abilities better (44%) and just under two-fifths want work that is less physical (38%). A third believe they would have more interesting work (or that they are bored with what they are currently doing) (34%), while just over a fifth (22%) wants more responsibility.

Figure 21: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 32 Q36



Qualifications and skills

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

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

Construction skill cards and certificates

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

Figure 22 summarises the proportion of workers by region/nation that hold any card and compares these proportions with previous surveys and the UK as a whole. Workers in the South East are amongst those most likely to hold skill certificates or cards. After a slight increase in this indicator in 2015 there has been no change.

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

Base: All respondents

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



As in previous surveys, the incidence of workers holding skill cards or certificates remains lower amongst younger workers (88% amongst 16 to 19 year olds) and those who have worked within construction for a shorter period of time (91% amongst those that have worked in the industry for less than a year). Although, in the South East, the extent to which younger and newer workers hold skill cards or certificates is greater than elsewhere. Thus, within the South East, the considerable improvement in the propensity for younger workers and workers that have started working in construction to hold a skill card or certificate since 2012 has been maintained.

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

Base: All respondents

		SE 2018/19	SE 2015	SE 2012	SE 2007	UK 2018/19
		%	%	%	%	%
Total (403)		98	98	96	71	97
Age	16 to 19 years (17) *	88	89	68	25	85
	20 to 24 years (51)	98	96	95	58	97
	25 to 44 years (208)	99	99	99	74	98
	45+ years (127)	98	97	95	82	98
Length of time in construction	<1 year in construction (22)	91	92	84	37	89
	1 to 2 years (29)	100	97	85	61	97
	2 to 5 years (63)	98	98	97	48	96
	5+ years (289)	98	98	97	77	98
Contract-type	Employed directly (178)	97	98	88	77	96
	Self- employed (183)	98	98	99	67	98
	Agency (38)	97	97	100	60	97
<i>Unweighted bases for 2018/19 South East in parentheses</i>						

Q12



In terms of the type of skill card or certificate held by construction workers in the South East, the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (87%), as it was in 2015 (91%). Overall, 10% hold the CPCS (Construction Plant Competence Scheme) card/certificate and this proportion increases to 12% of 25-44 year olds.

Figure 24: Type of skill card/certificate held

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	UK 2018/19 %
CSCS (Construction Skills Certification Scheme) (GB)	87	91	91	85
CSR (Construction Skills Register) (NI)	0	<0.5		3
CISRS (Construction Industry Scaffolders Record Scheme)	6	5	3	3
CPCS (Construction Plant Competence Scheme)	10	13	9	11
Other	7	3	4	4
<i>Unweighted bases</i>	403	439	420	4048

Q12

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

- Plant/machine operatives (72%) are more likely to hold CPCS (Construction Plant Competence Scheme);
- More than four-fifths of scaffolders (86%) hold CISRS (Construction Industry Scaffolders Record Scheme);
- All bricklayers, carpenters/joiners and labourers/general operatives hold CSCS (Construction Skills Certification Scheme (GB)).

Workers that hold a CSCS card were asked what colour their cards are. Figure 25 summarises the types of cards held by workers. Overall, within the South East, 4% of CSCS card holders have Red Trainee cards and 5% have Red Experienced worker cards; more than a third of CSCS card holders have Green cards (37%) and more than a quarter have Blue cards (27%). One in twenty CSCS card holders has Gold cards for advanced craft/skilled workers or supervisors (both 7%).



Figure 25: Colour of CSCS cards held

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

	CSCS %
Red - Trainee	4
Red - Experienced worker card	5
Green - construction site operative card for general site workers	37
Blue - skilled	27
Gold - supervisor card	7
Gold - Advanced craft/skilled worker	7
Black - contracts manager card	7
Academically Qualified Persons Card - Degree, HND, HNC, National Certificate, National Diploma	3
Other	2
<i>Unweighted bases</i>	351

Q13

As expected, younger workers are more likely to hold Red Trainee cards (43% of 16 to 19 year olds with a CSCS card*), while older workers are significantly more likely to hold Blue cards (40% of 45+ year olds). Workers currently employed by an agency are more likely to hold Green cards (77%), compared with those employed directly or self-employed (28% and 38% respectively). * Caution: small sample base here.

Card colours also vary significantly according to current occupation/trade, as Figure 26 summarises. Some significant differences include that labourers/general operatives are most likely to hold Green cards (88%); and plant and machine operatives (61%) are most likely to hold Blue cards.

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

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

	<i>Unweighted bases</i>	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold %	Black %
Labourer / Gen. Op.	57	4	2	88	2	0	0
Plant / Mach. Op.*	18	0	0	33	61	0	0
Carpenter / Joiner	43	7	5	12	37	33	2
Electrician	20	5	0	20	10	50	0
Bricklayer	24	0	4	21	63	13	0
Scaffolder*	12	0	17	8	58	17	0
Site manager	43	7	12	9	9	21	30



Construction qualifications held

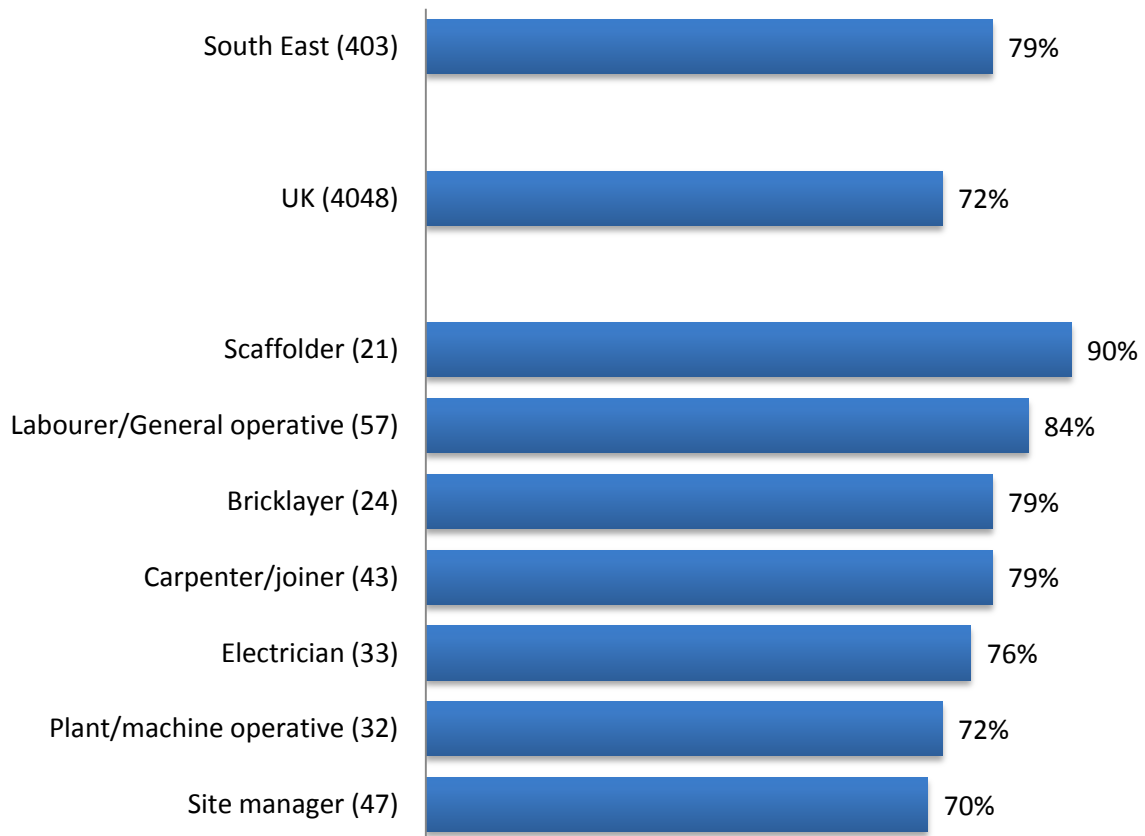
All workers were asked about the construction-specific qualifications they held after leaving full time education and started their first proper job in construction.

Overall, 79% of construction workers in the South East say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 70% in 2015 and 72% of all UK construction workers in 2018/19.

By current trade/occupation within the South East, the proportion of workers that started their construction careers with no formal qualifications is highest amongst scaffolders (90%) and labourers/general operatives (84%) and lowest amongst site managers (70%).

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

Base: All respondents *caution: small sample base



Unweighted bases in parentheses Q15/Q16



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

Overall, more than three-quarters of South East construction workers reported holding some sort of construction-related qualification at the time of interview (77%), compared with a significantly lower proportion in 2015 (58%). Compared with the UK average, South East construction workers were more likely to hold some sort of construction-related qualification at the time of the interview (72% across the UK).

As Figure 28 summarises, the proportion of workers that hold any qualifications is lower than average amongst those who have worked in construction for less than 2 years (50% of those that have worked in construction for less than a year and 45% of those that have worked in the sector for between 1 and 2 years) and amongst agency workers (53%).

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

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

		SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
Total (403)		77	58	62	52	72
Age	16 to 19 years (17)*	71	30	42	25	52
	20 to 24 years (51)	63	52	62	36	63
	25 to 44 years (208)	77	61	63	60	74
	45+ years (127)	84	61	64	48	76
Length of time in construction	<1 year (22)	50	22	9	0	34
	1 to 2 years (29)	45	43	33	19	52
	2 to 5 years (63)	73	59	63	31	63
	5+ years (289)	83	64	68	61	79
Current contract type	Employed directly (178)	81	66	69	51	75
	Self-employed (183)	79	55	62	62	73
	Agency (38)	53	29	40	15	49

Unweighted bases for 2018/19 South East in parentheses

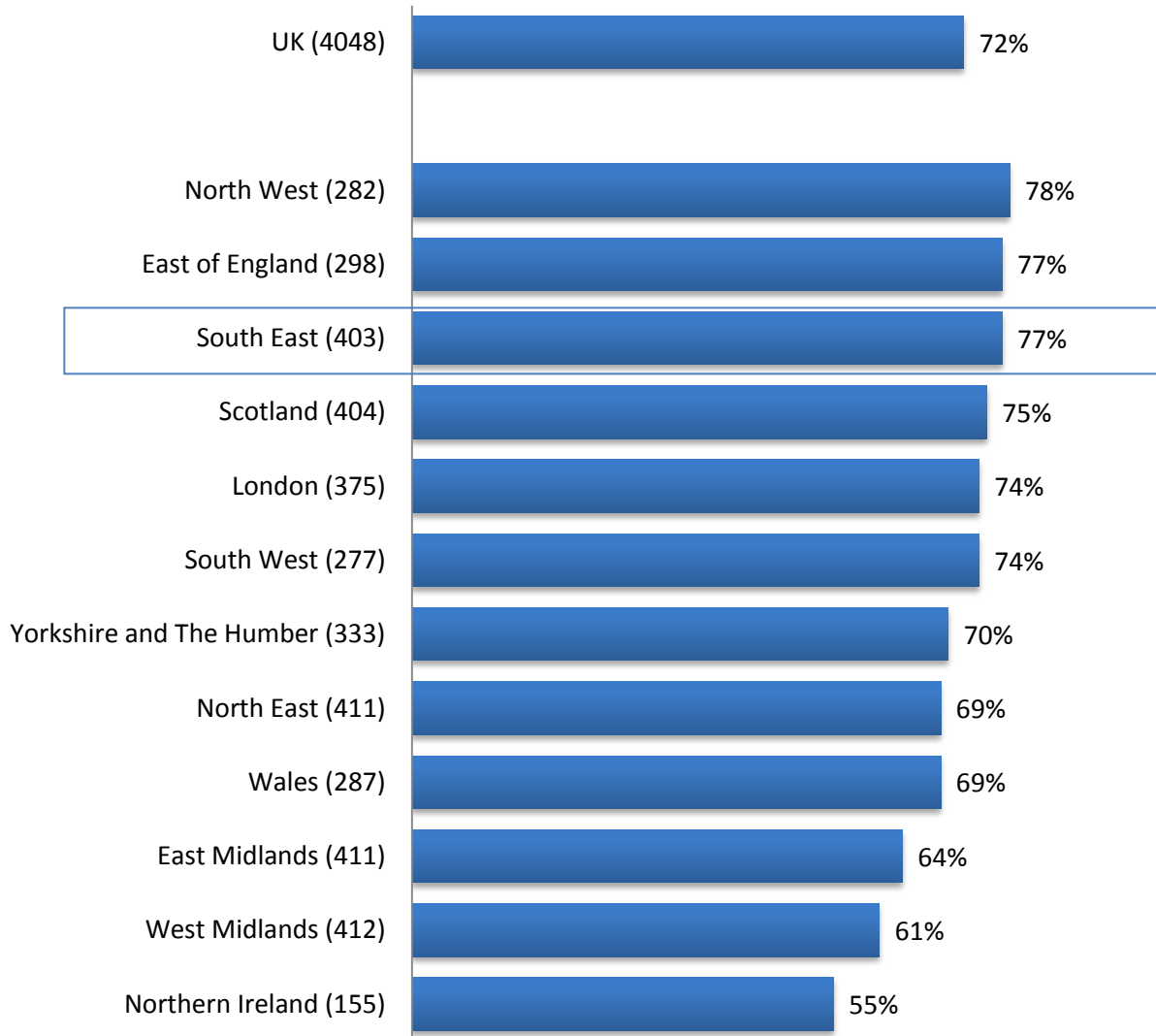
Q15/Q16



The South East is above the UK average in terms of the propensity of its construction workforce to hold any construction-specific qualifications (see Figure 29).

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

Base: All respondents



Unweighted bases in parentheses Q15/Q16

The likelihood that workers hold any qualifications also varies significantly by current job role. Bricklayers (100%), electricians (94%) and plant/machine operatives (94%) are more likely than average to hold qualifications. Only two-fifths of labourers/general operatives (39%) hold any.



Type of construction qualifications held

Based on the qualifications that workers had when they first started working in the construction industry and any they have gained since, Figure 30 summarises the types of qualifications that workers hold and compares the figures to the 2015 survey (amongst those who have any qualifications and who provided a response).

The qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (61%), which is lower than the proportion reported in 2015 in the South East (67% in 2015) but higher than the UK 2018/19 average (58%). One in eight South East construction workers with qualifications hold City & Guilds qualifications (13%), a lower proportion than in 2015 (17%), and similarly to the UK 2018/19 average (14%). In the South East just 3% of construction workers with qualifications hold an apprenticeship. The proportion reported in 2015 within the South East was atypically high but this year's compares with a slightly higher UK average of 6%.

Figure 30: Main type of qualification held

Base: Workers with qualifications (valid responses)

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
NVQ/SVQ	61	67	68	56	58
City & Guilds	13	17	17	34	14
Apprenticeship	3	25	1	1	6
HNC/HND/BTEC Higher	6	3	1	2	6
Degree	6	6	0	0	7
Other	21	8	3	0	24
<i>Unweighted bases</i>	<i>287</i>	<i>196</i>	<i>173</i>	<i>161</i>	<i>2122</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 basic skills to help with their work.

Overall, 1 in 10 construction workers in the South East believe they would benefit from some form of training in basic skills (10%) and this represents a downward trend since 2012 (14% in 2015 and 20% in 2012). The 2018/19 proportion is similar to the UK 2018/19 average (11%).

In terms of the type of training required there is an almost even split across reading, writing, speaking English, and Maths, as Figure 31 summarises.

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

Base: All respondents

	SE 2018/19	SE 2015	SE 2012	SE 2007	UK 2018/19
	%	%	%	%	%
ANY	10	14	20	10	11
Reading	5	6	9	5	5
Writing	5	6	8	5	5
Speaking English	8	8	8	5	6
Maths	3	3	9	4	5
<i>Unweighted bases</i>	<i>403</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4048</i>

Q37

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

- Younger workers aged 16-24 (15% cf. 4% aged 45+);
- Those who have worked in the industry for less than a year (32%);
- Self-employed workers (14%);
- Labourers/general operatives (25%) and carpenters/joiners (14%).



Current study for additional construction qualifications

Overall, 15% of all construction workers in the South East are currently working towards a formal qualification relevant to the construction industry (excluding supervisory or managerial qualifications). This is the same as the UK average in 2018/19 and compares with 10% in 2015 and 9% in 2012 in the South East.

As in previous surveys, the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (53% of 16 to 19 year olds) and amongst those who have worked within the construction industry for less than a year (41%). Workers employed directly (19%) are also more likely than those who are self-employed (12%) or working through an agency (11%) to be currently working towards a qualification. Of those who have no qualifications, 11% are currently working towards one. Figure 32 summarises these findings.

Figure 32: Proportion working towards additional construction qualifications

Base: All respondents * caution: small sample base

		SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
Total (403)		15	10	9	11	15
Age	16 to 19 years (17)*	53	55	37	25	55
	20 to 24 years (51)	24	21	12	21	24
	25 to 44 years (208)	14	8	13	9	14
	45+ years (127)	8	7			6
Length of time in construction	<1 year (22)	41	24	16	13	38
	1 to 2 years (29)	24	12	33	22	31
	2 to 5 years (63)	25	20	10	17	25
	5+ years (289)	10	7	6	10	9
Contract type	Employed directly (178)	19	14	N/A	N/A	20
	Self- employed (183)	12	7	N/A	N/A	9
	Agency (38)	11	6	N/A	N/A	11
Highest qualification level	None (92)	11	10	N/A	N/A	16
	Level 1 (16)	25	30	N/A	N/A	27
	Level 2 (102)	10	11	N/A	N/A	12
	Level 3 (67)	16	11	N/A	N/A	14
	Level 4+ (18)	22	13	N/A	N/A	21

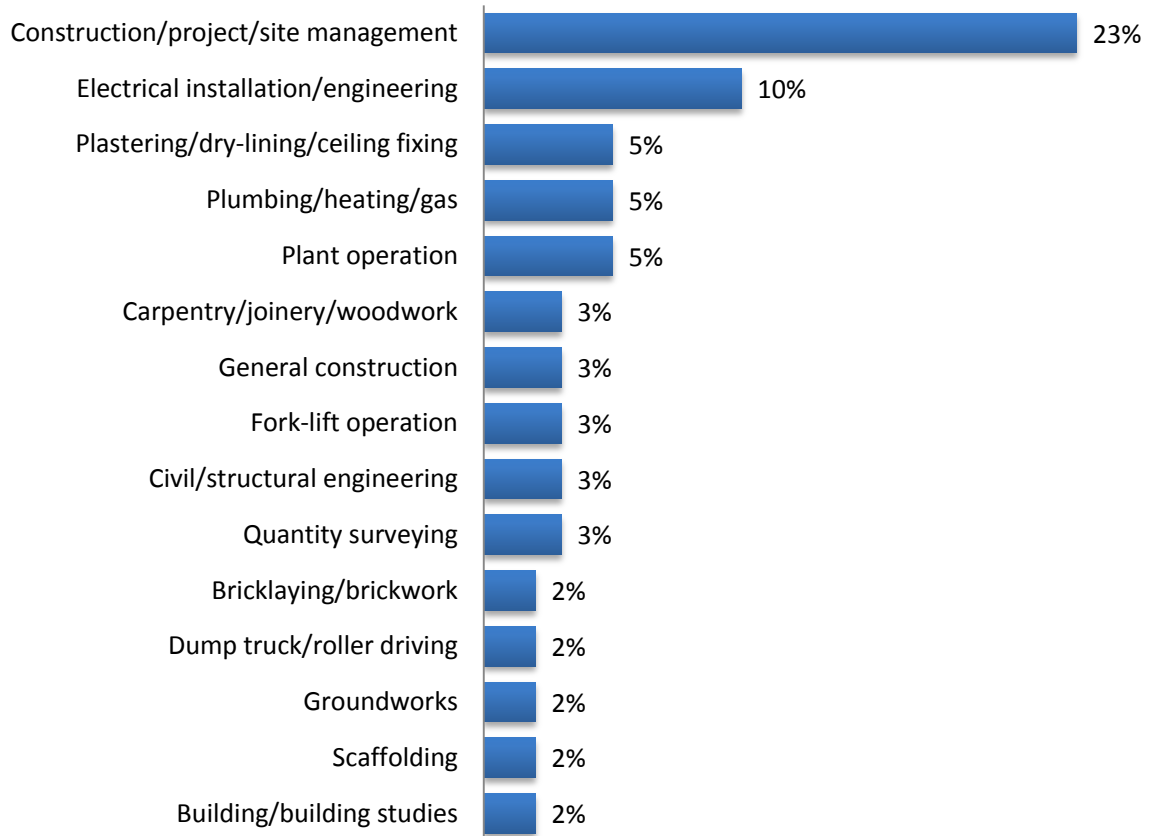
Unweighted bases for 2018/19 South East in parentheses

Q18



Of those who are currently studying for a qualification, the most popular type of qualification is an NVQ/SVQ (39%). In terms of the subject of the qualifications being worked towards, construction/project/site management (23%), followed by electrical installation/engineering (10%) are most popular, as Figure 33 illustrates.

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



Unweighted base = 61 Q19

Supervisory and managerial qualifications and training

As reported earlier, around a third of all construction workers in the South East perform a supervisory or management role at their site (34%). Amongst those who do not currently perform supervisory/management roles, 3 in 10 want to become a supervisor or manager in the future but have not done it before (30%) and a further 8% want to be a supervisor/manager and have done it before. One in six workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (18%), while more than two-fifths are certain that they do not want to be (43%).



The likelihood that workers want to be supervisors/managers also diminishes amongst those that have worked in the industry for at least 5 years, with 51% of those having worked in construction for 5+ years not wishing to be supervisors/managers, compared with a South East average of 43%. Analysis by contract type reveals that those who currently work for an agency are more likely than those employed directly or those who are self-employed to want to be a supervisor/manager but have not done it before (44%, 38% and 21% respectively).

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

*Base: Where do not perform supervisor/management roles on site *caution: small sample base*

		Unweighted bases	Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
South East		260	30	8	43	18
UK		2824	24	6	51	20
Age	16 to 19 years*	15	40	0	33	27
	20 to 24 years	41	44	2	27	27
	25 to 44 years	131	37	9	35	19
	45+ years	73	10	11	70	10
Length of time inc construction	<1 year*	19	53	0	32	16
	1 to 2 years	26	46	0	31	23
	3 to 4 years	51	39	4	29	27
	5+ years	164	23	12	51	15
Contract type	Employed directly	90	38	6	41	16
	Self-employed	135	21	10	51	19
	Agency	32	44	9	22	25
Highest qualification level	No Qualifications	81	35	4	43	19
	Level 1*	15	33	7	33	27
	Level 2	74	28	8	41	23
	Level 3	38	21	24	42	13
	Level 4+*	2	0	0	100	0

Two in five construction workers in the South East (39% cf. 26% in 2015 and 34% across the UK in 2018/19) and 4 in 5 of those who have had some form of supervisory or management responsibilities (81% cf. 73% in 2015, 55% in 2012 and 81% across the UK in 2018/19) have received any formal training designed to improve managerial or supervisory knowledge or skills.

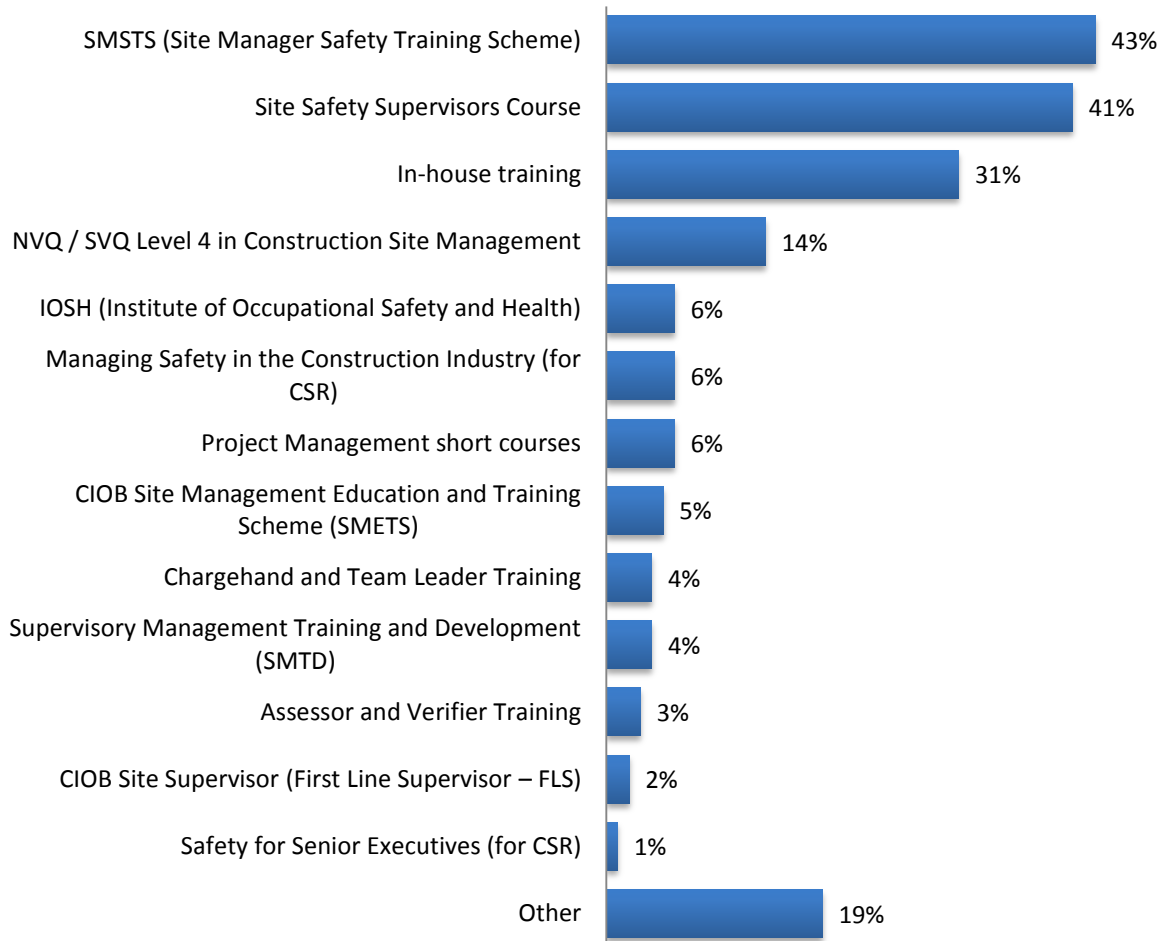


The proportion that has undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years than amongst those that have worked in the sector for less time (48%, compared with 15%). Construction workers employed directly are more likely than agency workers to have received formal training in this area (47%, compared with 26%). Nearly all site managers in the sample (94%) have received formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken, the proportions mentioning each type are summarised in Figure 35. SMSTS is most frequently mentioned (43%), closely followed by Site Safety Supervisors Courses (41%) with around a third mentioning in-house training (31%). These three were also the most frequently mentioned in 2015 and 2012.

Figure 35: Types of managerial/supervisory training undertaken

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



Unweighted base = 157 Q11



Overall skill levels

An overview of the qualification and skill levels of construction workers surveyed has been derived by combining data from various separate measures and is presented in Figure 36 below.

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

A fifth of the workforce (19%) holds a skill card/certificate, but has no other construction qualification. This indicator has declined sharply since 2012 (55% in 2012 and 36% in 2015), reflecting an increase in the proportion of the workforce that hold a construction qualification and, in 2018/19, an increase in the proportion that are working towards a qualification (from 10% in 2015 to 15% in 2018/19).

Figure 36: Qualification status summary

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	99	98	96	83	99
Holds a formal construction qualification or a skills card/certificate	99	98	96	80	98
Holds a skills card/certificate	98	98	96	80	97
Holds a skills card/certification but no other qualification	19	36	55	31	22
Working towards a qualification	15	10	9	11	15
<i>Unweighted bases</i>	<i>403</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4048</i>



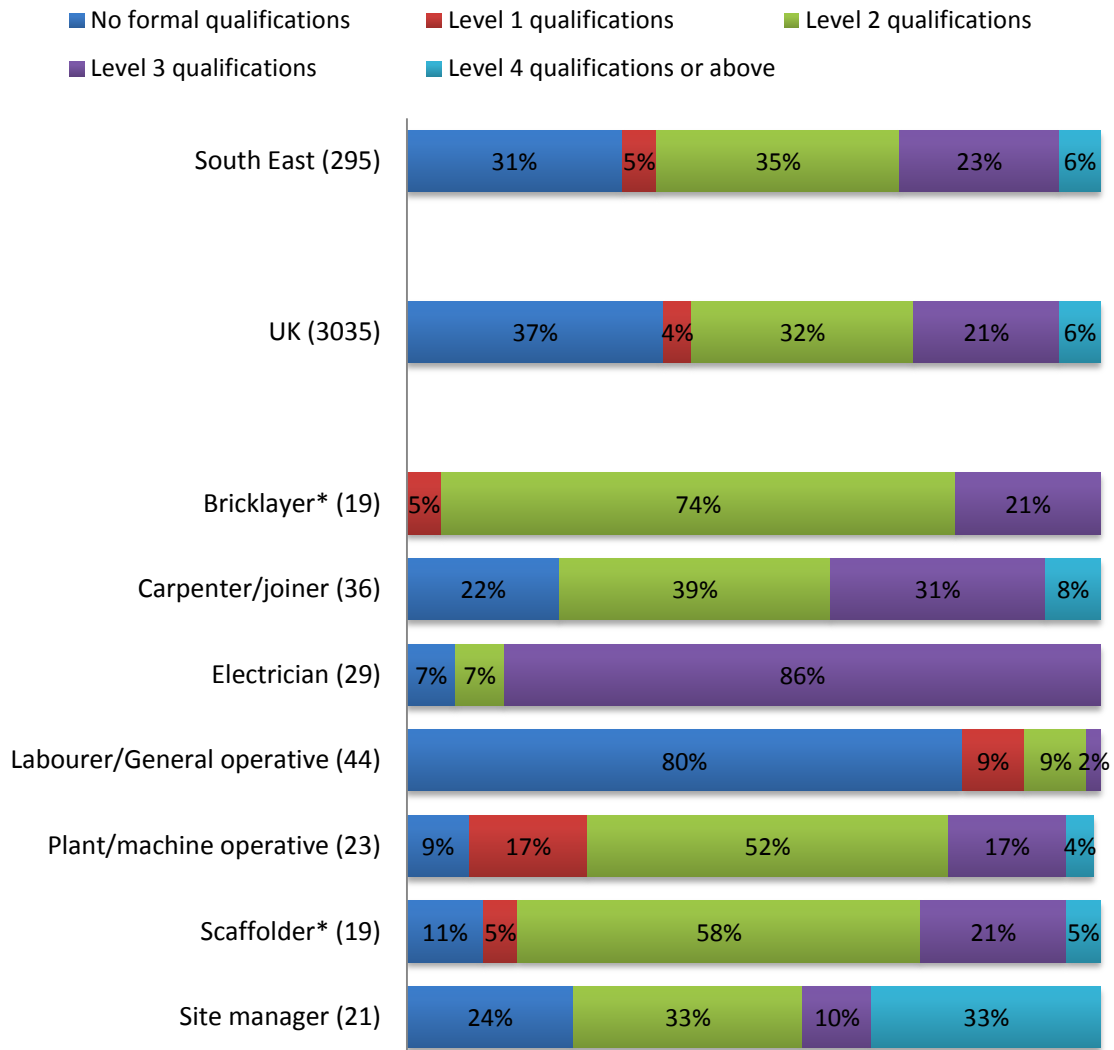
Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. Figure 37 summarises construction workers' highest level of qualification, overall and by occupation, based on where the information provided enabled a level to be assigned (27% of all South East construction workers did not provide sufficient information).

Overall, nearly two-thirds of construction workers in the South East providing a response have qualifications equivalent to Level 2 or above (63%, cf. 56% in 2015; 59% across the UK in 2018/19).

By occupation, site managers (providing a response) are most likely to hold the highest level of qualifications; a third holds qualifications at Level 4 or above (33%). Electricians are more likely than other occupations to hold qualifications equivalent to Level 3 (86%), with none holding Level 4+ qualifications.

Figure 37: Current qualification level, by occupation

Base: All respondents who provided a valid response *caution: low sample bases



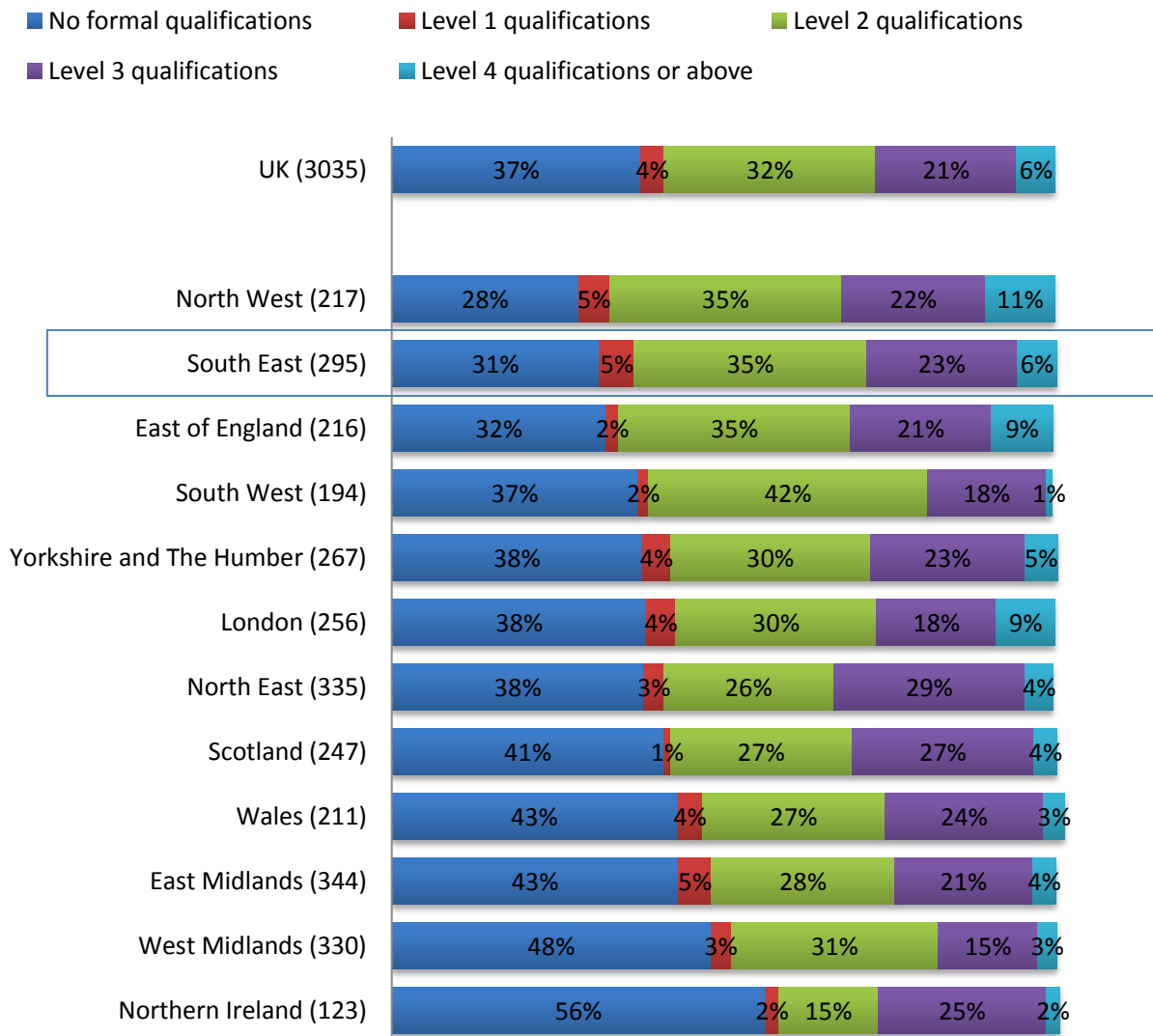
Unweighted bases in parentheses Q15/Q16



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

Figure 38: Current qualification level, by region/nation

Base: All respondents who provided a valid response



Unweighted bases in parentheses

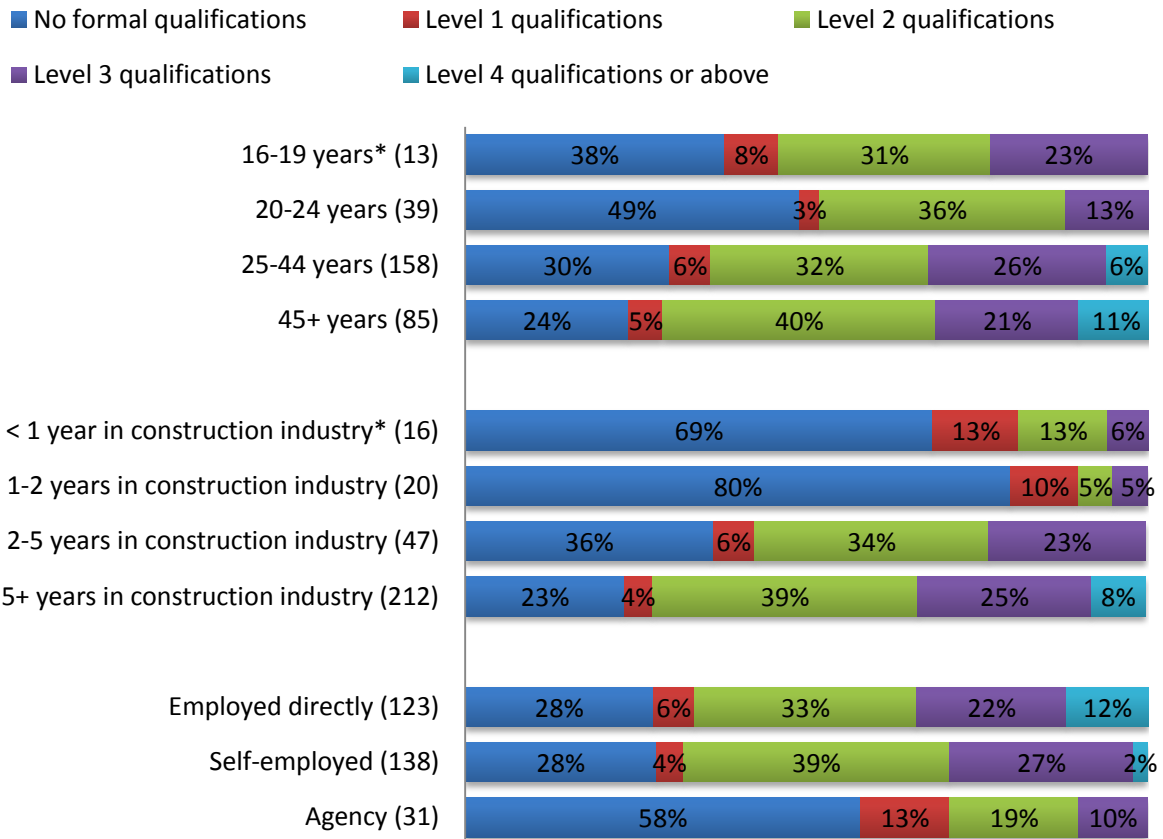


Looking at other sub-groups of construction workers, workers that have worked in construction for 5+ years are more likely than those having spent less time in the industry to have qualifications at Level 3 or 4+ (34%, compared with 15% that have less than 5 years' experience).

In terms of contract type, workers employed directly by a company are more likely to have higher level qualifications, compared with workers who are self-employed and agency workers; 1 in 3 workers employed directly have qualifications equivalent to Level 3 or above (34%), compared with slightly fewer self-employed construction workers (29%) and just 1 in 10 agency workers (10%). Figure 39 illustrates these variances and levels of qualifications held by other key variables.

Figure 39: Current qualification level, by other key variables

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



Unweighted bases in parentheses Q15/Q16



Geographic mobility

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

- Reasons for working in current location;
- Comparisons of current location, with workers' region/nation of origin;
- Proportion of construction workers' career that has been spent working in the current region/nation;
- Whether current site is commuted to daily from their permanent address or temporary accommodation is used;
- Miles travelled to site each day;
- Whether next site is commutable or requires temporary accommodation.



Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. Within the South East, similarly to across the UK as a whole, the most likely reason for working in a region/nation is because their employer sent them there (53% cf. 51% across the UK), while the proportion stating that it is because they grew up there/have always lived there was mentioned by fewer workers in the South East than across the UK as a whole (33% cf. 43% across the UK).

Figure 40: Reasons for choosing to work in current location

Base: All respondents

	SE 2018/19 %	SE 2015 %	UK 2018/19 %		SE 2012 %
Employer sent you here	53	44	51	Employer sent me	41
You grew up here/have always lived here	33	45	43	Family	35
Family reasons	5	5	5		
Came to the area to take up this or another job	4	9	3	More regular opportunities	18
There are more jobs available in this area	7	6	5	More jobs here	29
Construction work is better paid in this area	6	3	3	Better paid jobs	23
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	2	1	2	Prefer living here	14
Better promotional prospects in this area	<0.5	0	1	More chance of promotion	0
It's local to me	1	0	1		
<i>Unweighted bases</i>	<i>403</i>	<i>439</i>	<i>4048</i>		<i>420</i>

Q28

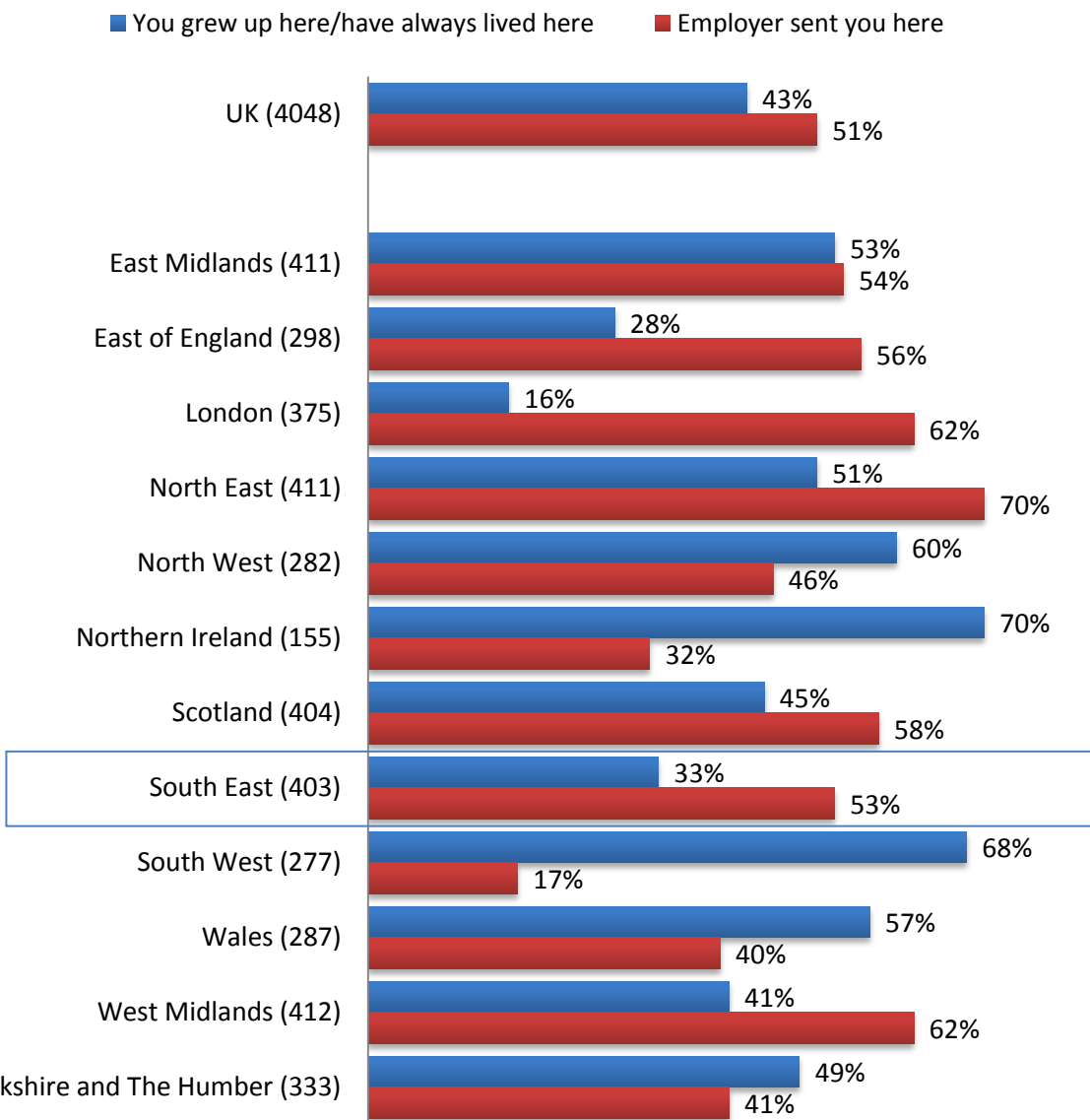


Workers that are directly employed are more likely than those that are self-employed or are agency workers to give the reason for working in their current region/nation as their employer having sent them there (69% cf. 45% and 13% respectively). Three-fifths of agency workers (61%) work where they do because they grew up/have always lived there, compared with a quarter of those employed directly (26%) and a third of the self-employed (34%).

There are significant differences by region/nation in the proportions that give these two main reasons for working in their current location. These differences are summarised in the following figure. Construction workers in the South East are less likely than the UK average to cite having always lived there, but as likely to say their employer sent them.

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

Base: All respondents



Unweighted bases in parentheses Q28



A third of all workers in the South East have worked within this region for their entire construction career (32%), compared with a similar proportion in 2015 (35%) and a lower proportion in 2012 (25%). With a further 29% that have remained in this region most of the time, this means the majority of all workers have remained in the South East for all or most of the time (61%), a lower proportion than the UK average (77%).

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

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
All of your time	32	35	25	48	44
Most of it	29	37	33	34	33
Around half your time	14	11	12	6	9
A small proportion of your time	20	9	23	8	10
Only on this job (this is the first site you've been to in this region/nation)	4	5	5	3	2
Don't know	<0.5	3	1	1	1
<i>Unweighted bases</i>	403	439	420	331	4048

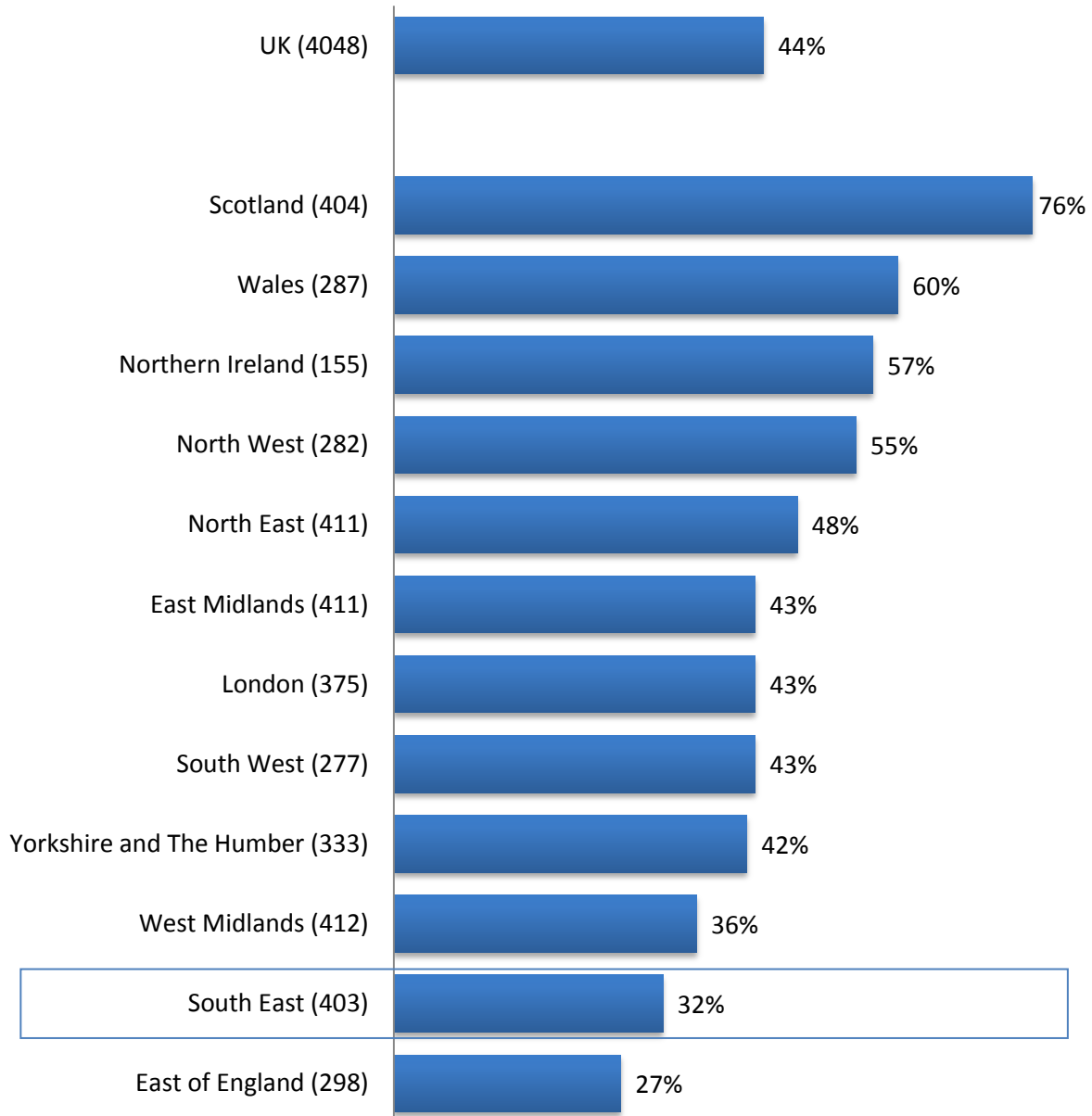
Q26/Q27



The proportion of construction workers in the South East that have spent all of their time in the region is higher amongst younger workers (47% of 16 to 24 year olds) and similarly high amongst those that have worked in the construction industry for the shortest period of time (55% of those that have worked in the industry for less than a year and 62% of those that have worked in the industry for between 1 and 2 years).

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

Base: All respondents



Unweighted bases in parentheses Q26



The proportion of workers that reported their employer operates (takes on construction contracts) only within particular regions/nations, nationwide or internationally is shown in Figure 44. In the South East, two-thirds (66%) indicate their employer operates nationwide, with a quarter (26%) stating that their employer operates in particular parts of the UK including the South East, while 5% are unsure.

Figure 44: Region/nation employer operates in (takes on construction contracts), compared with region/nation working in currently

Base: All respondents

*denotes less than 0.5%

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

Q25



Region/nation worked in before current site

Thinking about the last construction site they worked on, before this one, in the majority of cases, workers' last sites were in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 45 illustrates. As in 2015, construction workers in the South East are amongst those least likely to state that their last site was in the same region (62%), but the proportion is higher than in 2015 (56%). The only region with a lower proportion on this measure is the East of England (52%).

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

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

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

Q32



Worker origins

Workers were asked which region/nation they were living in just before they got their first job in construction in the UK. Overall, half of all construction workers in the South East were living in the South East when they started their construction careers (51% cf. 55% in 2015). Again, only within the East of England is there a lower proportion of construction workers that were living in that region when they started their careers (44%). Figure 46 summarises this data.

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

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

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

Q40



Thinking next about where workers studied for their first construction qualification, Figure 47 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that two-fifths of construction workers in the South East (41%) achieved their first qualification there. This is the lowest proportion across all regions/nations and is lower than reported in the South East in 2015 (55%).

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

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

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

Unweighted bases for 2018/19 in parentheses

Q17



Travel to site

Relative locations of current workplace to home

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

More than two-fifths of construction workers in the South East are travelling into the region for work from another region/nation in which their current residence is based (45%) and this is a similar proportion to 2015 (42%). Compared with other regions/nations, construction workers in the South East are most likely to be travelling into the region from another region/nation.

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

Base: All respondents who provided a valid response

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

Unweighted bases for 2018/19 in parentheses

Q52/Q54



The extent to which construction workers live in the same region/nation in which they work is further illustrated in Figure 49. More than half the construction workers in the South East are currently living in the same region as the site they work in (55%), which compares with 58% in 2015. In terms of workers travelling from a different region, they are equally likely to be travelling from the East Midlands (11%), East of England (10%), London (9%) and the South West (9%).

Figure 49: Region/nation of current site in relation to current residence

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

Region/nation of current residence	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	90	9	0	0	0	0	0	11	0	*	14	6
East of England	1	60	18	0	0	0	0	10	0	0	*	0
London	0	16	63	0	0	0	0	9	0	0	*	1
North East	0	0	*	96	0	0	0	0	0	0	0	2
North West	*	0	*	*	94	0	0	0	0	0	4	1
Northern Ireland	0	0	2	0	0	100	0	1	0	0	0	0
Scotland	0	0	1	1	0	0	100	*	0	0	0	0
South East	1	11	14	0	0	0	0	55	2	0	0	*
South West	0	1	0	0	0	0	0	9	94	2	*	0
Wales	0	0	*	0	1	0	0	2	2	98	1	0
West Midlands	6	2	1	0	0	0	0	4	2	0	80	1
Yorkshire and the Humber	2	1	1	3	5	0	0	*	0	0	1	88
Unweighted bases	309	270	341	335	257	145	196	362	243	258	308	290

Q52/Q54

Furthest distance worked in last 12 months

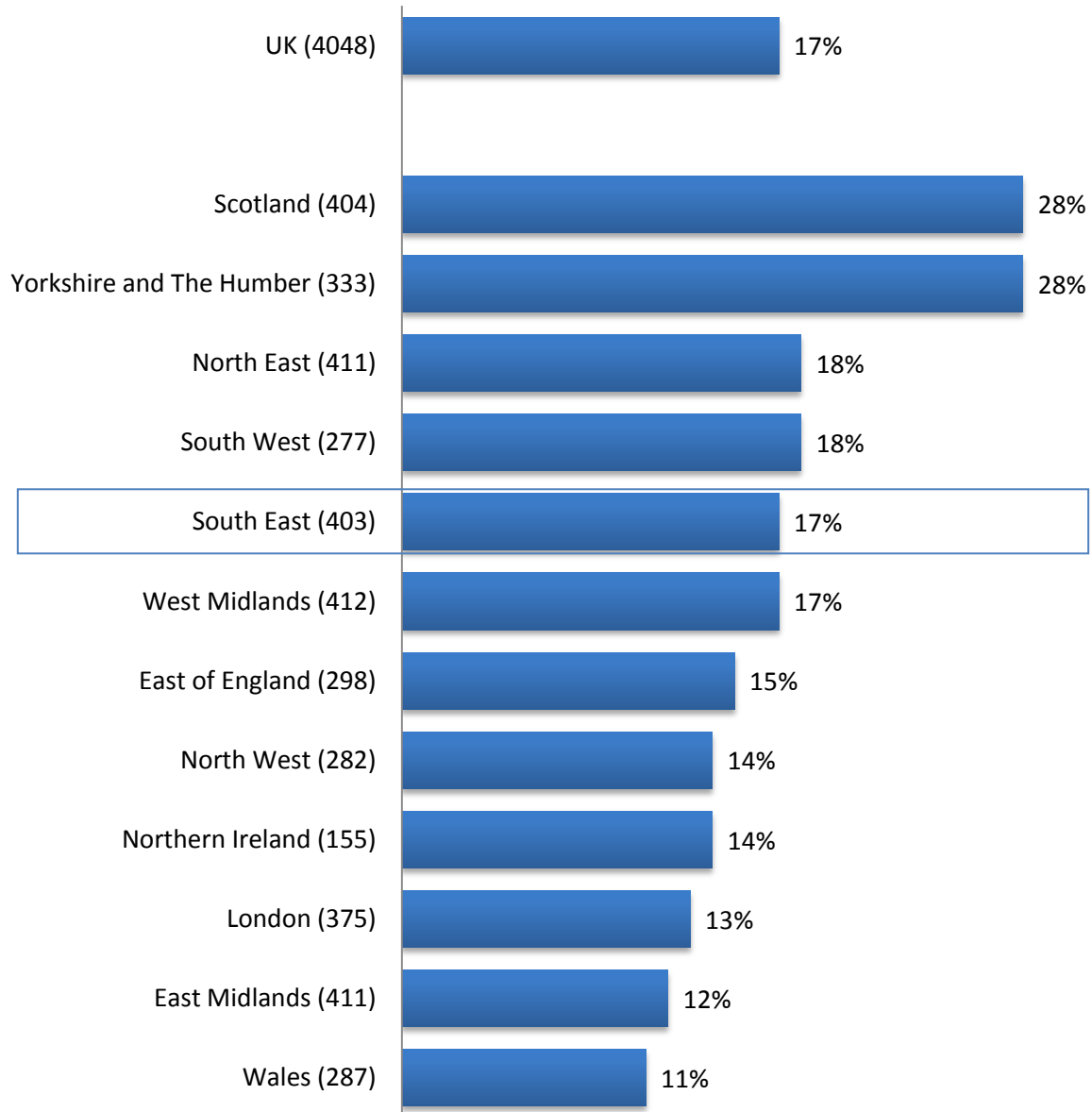
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within the South East, around 1 in 5 construction workers have worked no more than 20 miles away (19%) and a third have worked between 21 and 50 miles away (33%). The average maximum distances travelled to work by South East construction workers in 2018/19 were shorter than in 2015 when 16% had worked no more than 20 miles from their home, and 27% had never travelled further than between 21 and 50 miles to work. This leaves nearly half that have worked more than 50 miles away from their permanent home (48%), with 1 in 3 that have worked between 51 and 100 miles away (31%), and 1 in 6 that have worked more than 100 miles away (17%).

Workers based in the South East are on a par with the UK average with regard to their propensity to have travelled more than 100 miles from their permanent home to work in the last 12 months (17%).



Figure 50: Proportion of workers that have travelled more than 100 miles from their permanent home to work, in the last 12 months, by region/nation

Base: All respondents



Unweighted bases in parentheses Q29



Use of temporary accommodation

Nationally, 1 in 20 (5%: 6% in 2015) construction workers reported that they were currently staying in temporary accommodation while working at their site. By region/nation, the South East proportion is towards the higher end of the range (7%), with the highest proportion in London (10%).

Figure 51: Percentage of workers in temporary accommodation

Base: All respondents

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

Q41/Q42

Journey distance to work

Within the South East, the average (mean) distance from workers' current residences (taking into account temporary residences) to their current site was 27 miles, which is the same as the average reported in 2015, but less than the average of 37 miles reported in 2012. The South East mean compares to a lower mean of 18 miles across the UK.

Three in ten (29%) travelled less than 10 miles from their current residence to the site they work, whilst 21% travelled between 10 and 19 miles, 33% travelled between 20 and 49 miles, 16% travelled between 50 and 99 miles, and 1% travelled more than 100 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (34% of all construction workers in the South East) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 8% expect to work for another week or so, or less; 4% expect another month; 10% between a month and 3 months; 9% between 3 and 6 months; 13% between 6 months and a year, and 14% expect to still be working for their current company/agency in more than a year's time. More than two-fifths



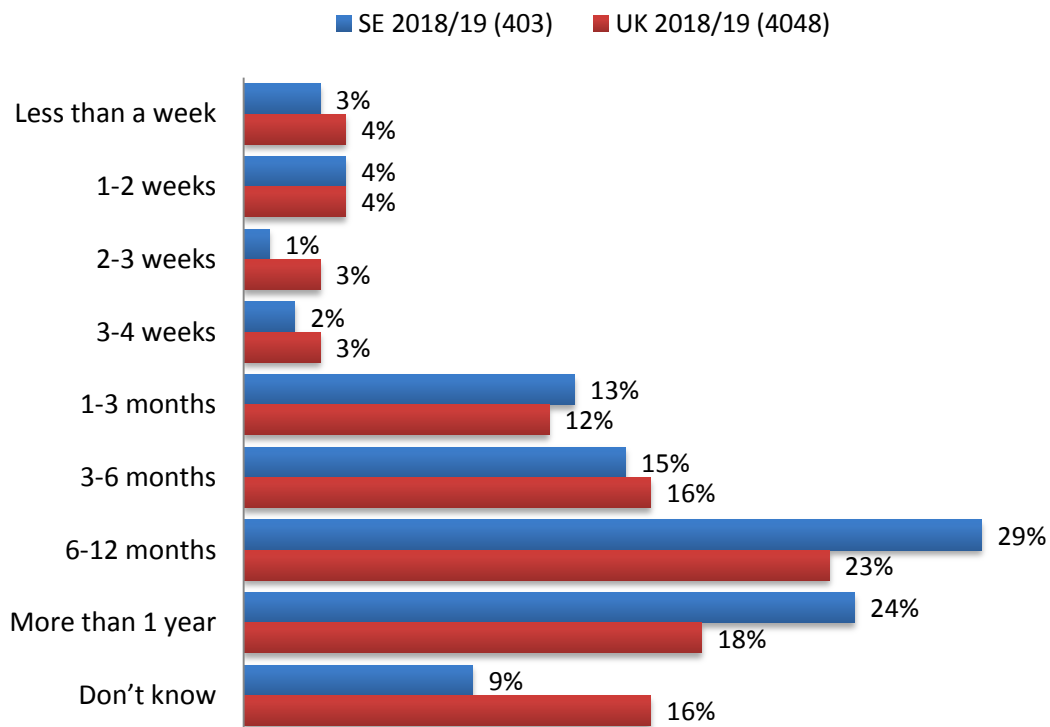
of temporary workers in the region did not know how much longer they could expect to be working for their current company/agency (43%; 38% across the UK).

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

Around 1 in 10 construction workers in the South East (11% cf. 21% in 2015 and 22% in 2012) do not expect to work on that site for more than a month, including 3% that only expect to be there for a week or less. More than half anticipate being on site for more than a month but less than a year (57%), while a quarter expect to stay on that site for a year or longer (24%), which is slightly fewer than in 2015 (29%) when a significant increase compared with 2012 was reported (12%). It compares with a UK average in 2018/19 of 18%. In around 1 in 10 cases (9% cf. 22% in 2015 and 18% in 2012) workers did not know how much longer they could expect to be on-site. Thus, there would appear to be less uncertainty and insecurity amongst construction workers in the South East this year.

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

Base: All respondents



Unweighted bases in parentheses
Q24

The youngest workers, aged 16 to 24 are slightly more likely to be unsure of how much longer they can expect to work for (12% did not know).

Amongst the various trades/job roles, site managers are more likely to indicate that they expect to work at that site for more than a year (36%); whilst bricklayers (4%), scaffolders (10%) and electricians (12%) are least likely to indicate that this is the case.



Expected next site location

Nine in ten construction workers in the South East are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis, and this is a higher proportion than in previous surveys (90% cf. 77% in 2015 and 69% in 2012). Just 3% of workers are sure that this will not be the case, while a further 3% said that it depends where the work is and 4% did not know.

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

Construction workers who have worked in construction for the longest period of time are more likely to be confident of this (91% of those who have worked in the industry for 5+ years, cf. 86% of those who have worked in construction for under a year). Younger workers are significantly less confident (82% of 16 to 24 year olds). Workers that are certain that their next job will not be within commuting distance of their permanent home were asked to indicate which region/nation they expect to be working in next. The following figure summarises their responses by region/nation (although the base sizes within each region/nation are very small, so some caution is needed) and it gives an indication of the likely pattern of movement between regions/nations. A quarter of construction workers in the South East (25%) that do not expect to be able to commute daily to their next job expect to remain in the region for their next job. Most of the remainder are evenly split between London (17%) and the West Midlands (17%).

Figure 53: Expected location of next site/job

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

* denotes less than 0.5%

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

Q31



Sub-sector and sector mobility

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

Sub-sector mobility

All workers were asked which (if any) of six types of construction work they have spent periods of at least 3 months at a time working in.

Following on from 2015, the vast majority of construction workers in the South East have worked on new housing (81% cf. 84% in 2015). Compared with 2015, there has been an increase in the proportions of construction workers that have been working on other types of projects.

A quarter of all construction workers in the South East have only worked on one project type (23%), a decrease on 2015 (47%), and there has been an increase in the proportion of workers that have spent significant periods working in four or more sub-sectors (in aggregate, 47% cf. 26% in 2015). This suggests less stability in the types of projects available to work on but also more flexibility within the workforce.

Figure 54: Type of projects spent significant periods on

Base: All respondents

	SE 2018/19 %	SE 2015 %	SE 2012 %	SE 2007 %	UK 2018/19 %
New housing	81	84	82	95	79
Housing repair and maintenance including extensions/loft conversions	54	41	47	44	46
Commercial work such as shops, office, pubs etc	59	35	51	44	51
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	54	30	43	31	45
Public non-housing work such as schools, sports facilities, landscaping	60	33	60	42	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	31	21	32	20	31
ONE TYPE ONLY	23	47	18	30	30
TWO TYPES	15	12	22	24	16
THREE TYPES	15	13	17	12	14
FOUR TYPES	12	6	13	15	12
FIVE TYPES	16	9	16	13	13
SIX TYPES	19	11	11	6	14



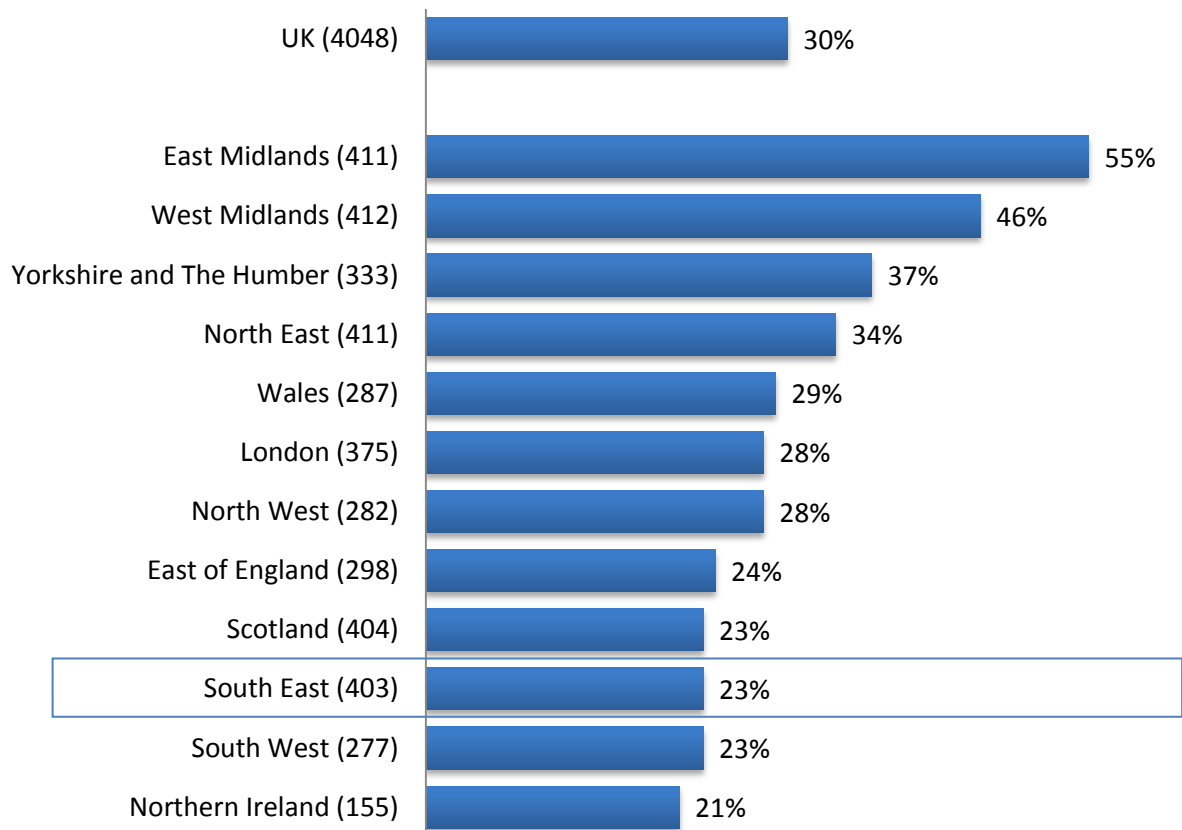
<i>Unweighted bases</i>	403	439	420	331	4048
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Q3/Q4

The number of project types worked on varies significantly by region/nation, as Figure 55 illustrates. The South East is amongst the least likely regions/nations to have construction workers who have only worked on one project type (23% cf. 30% in the UK).

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

Base: All respondents



Unweighted bases in parentheses Q4



The likelihood that workers have worked only on one project type declines as age increases, (from 47% of 16 to 19 year olds* to 13% of 45+ year olds). By current trade/occupation, the proportion is lowest amongst scaffolders (5%), who are most likely to have worked on 5 or 6 project types (62%), and electricians (6%; 55% have worked on 5 or 6 project types).

* caution: small sample base

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

Base: All respondents

	<i>Unweighted bases</i>	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Bricklayers	24	42	0	4	13	8	33
Carpenters/joiners	43	16	14	21	21	9	19
Electricians	33	6	12	9	18	27	27
Labourers/general operatives	57	44	23	7	9	11	7
Plant/machine operatives	32	16	13	19	3	13	38
Scaffolders	21	5	5	14	14	10	52
Site managers	47	21	13	19	9	19	19

Leaving the sector

In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Overall, 7 in 10 (70%) felt it was at least very likely that they would still want to, which is a lower proportion than the UK average (74%). This included, within the South East, just under half of construction workers that say they definitely will be (47%). More than a third think it is very or quite likely (37%; 23% very; 14% quite); 3% consider it unlikely; 3% say they definitely won't be; and a further 6% hope to be retired by then, while 4% don't know.



Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 19% of construction workers aged 45 and over and 65% of those aged 60 and over. The proportion that feel they will definitely still want to work in the construction sector, or that it is very likely, in five years is highest amongst the youngest workers (76% of 16 to 19 year olds*) and declines to two-thirds of workers aged 45 and over (68%). * caution: small sample base

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

Base: All respondents

	SE 2018/19 %	UK 2018/19 %	Age			
			16 to 19 %	20 to 24 %	25 to 44 %	45+ %
Definitely will be	47	48	35	51	49	45
Very likely	23	26	41	12	25	23
Quite likely	14	11	18	20	16	6
Quite unlikely	2	2	0	4	2	2
Very unlikely	1	2	0	2	1	1
Definitely will not be	3	1	0	4	2	3
Hope to be retired	6	4	0	0	<0.5	19
Don't know	4	5	6	8	5	2
<i>Unweighted bases</i>	<i>403</i>	<i>4048</i>	<i>17</i>	<i>51</i>	<i>208</i>	<i>127</i>

Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 49% believe they will definitely want to be working in the construction sector, 24% believe it is very likely they will want to be working in the construction sector and 14% believe it is quite likely they will want to be working in the construction sector. Only 6% think on any level that they will not want to be working in the construction sector in 5 years' time which is less than in 2015 and continues a downward trend from 2012 (8% in 2015 and 16% in 2012).

Overall, 6% of all construction workers felt it was unlikely that they would still want to work in the construction sector in five years' time. These workers were asked the reasons why. They were most likely to cite the fact that work outside of construction might be less physical (26%, 9 respondents), while more a fifth thought that outside of construction they might find more interesting work (that they might be bored of what they are doing now and need a change); might be better paid; and/or that they might be able to use their skills/abilities better (each mentioned by 22%, 7 respondents). One in six cited more suitable hours/conditions outside of construction (17%, 6 respondents) while 1 respondent mentioned having more responsibility in non-construction jobs.



The South East construction workforce 2018-19 summary

Across the wide range of issues covered within the 2018/19 survey there are indications of more flexible, adaptive working patterns across the UK construction workforce and this is strongly reflected among the South East workforce. Within the South East there has been a decrease in the proportion of workers employed directly by companies, from 53% in 2015 to 44% in 2018/19, and there has been a corresponding increase in the proportion that is self-employed (from 38% in 2015 to 45% in 2018/19). A higher proportion of workers in the South East than UK-wide are employed on a temporary basis in 2018/19 (34%, compared to 28%).

Workers in the region, on average, travel longer distances to their current site than the UK average (27 miles compared with 18 miles) and there has been no change in this respect since 2015.

South East construction workers are much more likely to report that they work at their current site because their employer sent them there, than because they have always lived in that area or their employer sent them there (53% and 33% respectively). They are less likely than the UK average to report being long term residents of the area in which they currently work and there is more recent mobility among South East workers compared with the UK as a whole in this respect. Compared with workers in most other regions/nations, they are less likely to have also been based in the South East for their last job (workers in the East of England being the least likely) and also amongst the least likely (again, alongside workers in the East of England) to have started their construction careers and the least likely to have obtained their first qualification/training in construction in the same region in which they are now based.

There is a little more uncertainty with regard to the duration of current projects amongst temporary workers within the region than average across the UK; 43% do not know how long they expect to continue with their current employer/agency, compared with a UK average of 38%. Just one in ten of all South East workers are not sure how much longer they can expect to be on site.

Compared with 2015 and the UK average in 2018/19, South East workers were more likely to be confident that their next job will be at a location that will allow them to travel to work from their permanent home on a daily basis (90%, compared with 77% in 2015 and a 2018/19 UK average of 84%).

South East construction workers are more likely to have worked in more than one trade than they were in 2015 (46%, compared with 37% in 2015) and less likely to have worked in just one project area (23%, compared with 47%). This is in line with the UK trend.

Construction workers in the South East are more likely than the UK average to aspire to supervisory or managerial roles.

In terms of skills and qualifications it is encouraging to note that the vast majority of South East construction workers continue to hold some form of skill card or certificate and that high proportions of younger and less experienced workers do so. There are higher levels of



qualified workers in the region compared with the UK and a similar proportion of workers in the South East to the UK average are working towards a construction qualification (15%).



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