

# Workforce Mobility and Skills in the UK Construction Sector 2022

South West Report - May 2023



Study prepared by BMG Research from a commission by CITB.

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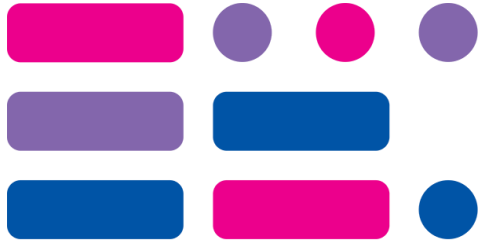
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## Executive summary

CITB commissioned BMG Research to undertake the 2022 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2018/19, 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 3,005 construction workers undertaking manual roles on sites across the UK and 201 interviews were conducted with construction workers in the South West region.

### Profile of the sample

As in previous years of the survey, the vast majority of construction workers in manual roles interviewed in the South West are male (96%), in line with the UK average.

Within the South West, the youngest age group (16 to 24 year olds) accounts for close to a quarter of construction workers (24%), an increase on 2018/19 (18%), and higher than the 2022 UK average (19%) and the UK workforce overall (13%). Just 2% are aged 60 or over, lower than the UK average (6%).

At 3%, the proportion of South West construction workers of ethnic minority origin is lower than the UK average (7%) and the total South West proportion of residents of an ethnic minority group aged 16 to 64 (6%).

The majority of construction workers in the South West (95%, compared to 91% in 2018/19) originated from the UK and just one in twenty (4%) hold a passport for another country, which is lower than in 2018/19 (7%) and compared to the UK average (13%).

The majority of South West construction workers have lived in the UK all of their life (87%) and this is significantly higher than the UK average (80%).

Just 3% of construction workers in the South West report that they have a long-term illness, health problem, or disability which limits the type of work they can do (5% in 2018/19), in line with the UK average.

Labourers/general operatives account for the highest proportion of construction workers in the South West, (16%, compared to 17% in 2018/19 and a UK average of 18%). Bricklayers, ground workers, carpenters/joiners, site managers and plant/machine operatives each account for around one in ten construction workers (13%, 10%, 9%, 9% and 8% respectively), largely in line with the UK average.

Three in ten (30%) construction workers in the South West say they perform a supervisory or management role on their site (as in 2018/19), which is similar to the UK average (28%).

Around a third (35%) of construction workers in the South West are self-employed, fewer than in 2018/19 (40%), and below the UK average (42%). There has been a significant increase in the proportion who report being directly employed, from 47% to 57%, placing

the South West above the UK average of 48%. Less than one in ten (7%) report working for an employment agency, in line with the UK average (9%).

Just over a fifth (22%) of construction workers in the South West are employed on a temporary, rather than a permanent basis (74%). This represents a significant decrease on the 43% who reported being in temporary employment in 2018/19.

Construction workers in the South West, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (70%, compared to a UK average of 59%), while 16% work more than 50 hours a week, down on 2018/19 (26%), but only slightly lower than the 2022 UK average of 19%.

## Work history

### Time in the sector

A quarter (26%) of all construction workers in the South West have worked in the construction industry for over 20 years, fewer than in 2018/19 (32%), and compared to the UK average (30%). While half (51%) have worked in the industry for at least 10 years, again, fewer than in 2018/19 (60%).

The proportion of South West construction workers who have worked pretty much continuously in the industry has remained stable over time at around a half (49%, compared to 48% in 2018/19 and 52% in 2015), remaining lower than the UK average of 61%. Consequently, the proportion who have only ever worked in construction has also remained stable over the last three years, at 57%, compared to 59% in 2018/19. Again, this places the South West below the UK average in this respect (71%).

### Previous non-construction jobs

Overall, 23% of construction workers in the South West say that their first job after full-time education was not in construction and that they moved into the industry after working in other sorts of jobs/sectors.

The most common sectors in which construction workers had started their careers were wholesale and retail trade (19%) and accommodation (17%). Manufacturing as a source of new construction workers has seen a significant decline since 2018/19 (7% compared to 51%). This pattern largely reflects that observed across the UK construction workforce.

In terms of the job roles that respondents have held in other sectors, the highest proportions were in elementary administration and service (27%), associate professional and technical (17%) and skilled trades (15%) occupations.

### Occupational switching within the construction sector

Overall, two in five (39%) of all construction workers in the South West have worked in more than one construction trade or occupation whilst working in the construction industry, fewer than in 2018/19 (46%), but broadly in line with the 2022 UK average (35%).



Amongst this group, 14% had worked in 1 previous role, 44% had worked in 2 previous roles, 34% had worked in 3 roles/occupations and 8% had worked in 4 roles/occupations, much in line with the UK average. Workers are most likely to have previously worked as a labourer/general operative (51%). This is very much in line with UK averages.

Four in five (80%) construction workers in the South West would like to carry on in the same trade or occupation, as in 2018/19 and compared to the UK average. Close to one in twenty (4%) would like to change their trade/occupation, fewer than 2018/19 (10%), but closer to the 2022 UK average (7%). The remainder would like to leave construction (3%) or were unsure (13%).

## Qualifications and skills

### Skills cards/certificates

Almost all (97%) construction workers in the South East reported holding a skill card or certificate (e.g. CSCS or CSR), and this is in line with previous iterations of the survey. Along with Northern Ireland and the North East, this is the highest level of card/certificate holding in the UK, and is in contrast to the UK-wide picture, where the proportion holding cards/certificates has declined from 97% in 2018/19 to 93% in the latest survey.

In terms of the type of skill card or certificate held by construction workers in the South West, the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (85%). Overall, 16% hold the CPCS (Construction Plant Competence Scheme), as in 2018/19,, and 3% hold the CISRS (Construction Industry Scaffolders Record Scheme).

### Construction-specific qualifications

Over a half (54%) of construction workers in the South West report having had no construction-related qualifications when they started their first job. This is significantly lower than in 2018/19 (68%), but higher than the 2022 UK average (47%).

Overall, approaching seven in ten (68%) construction workers in the South West reported holding a construction-related qualification, lower than the 74% who did so in 2018/19. This reflects the UK-wide picture, where there has been a decrease in the proportion of workers holding a qualification, from 72% in 2018/19 to 69% in 2022.

As in previous years, the qualifications most likely to be held by construction workers in the South West are NVQ/SVQ qualifications (80%), and to an even greater extent than 2018/19 (63%). One in eight (13%) construction workers with qualifications hold City & Guilds qualifications (compared to 17% in 2018/19 and 21% in 2015), whilst 9% hold an apprenticeship, (10% in 2018/19) and 11% across the UK in 2022). One in twenty (5%) construction workers with qualifications hold an HNC/HND/BTEC Higher, and just 2% hold a Construction Award or a degree.

### **Current study for additional construction qualifications**

Overall, 12% of all construction workers in the South West are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). While this is in line with the UK average (13%), it is lower than 2018/19 (19%) in the region.

### **Supervisory and managerial qualifications and training**

Amongst those who do not currently perform supervisory/management roles and have not had this role before, a quarter (23%) want to become a supervisor or manager in the future and one in twenty (6%) previously held the role and want to return to that status (22% and 11% respectively in 2018/19). Close to half (48%) are certain that they do not want to, which is below the UK average (59%). The remaining 24% are unsure.

Over a third (36%) of all construction workers in the South West have received formal training designed to improve managerial or supervisory knowledge or skills, in line with the 33% who had in 2018/19, and the 2022 UK average of 33%. Among those who have or have had some form of supervisory or management responsibilities, just over four in five (82%) have received formal training, in line with 2018/19 (and the UK average (both 80%).

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) and Site Safety Supervisors Course are the most frequently mentioned (both 42%), followed by in-house training (25%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

### **Basic skill needs**

Overall, 16% of construction workers in the South West believe they would benefit from some form of training in basic skills (compared to 11% in 2018/19, 12% in 2015 and 28% in 2012). This is a similar proportion to the UK average (19%), which has seen an increase since 2018/19 (11%).

### **Overall skill levels**

As in previous years, the vast majority (97%) of construction workers in the South West have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview); only 3% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

At 12%, the proportion of construction workers who are working towards a construction qualification is in line with the UK average (13%), but lower than 2018/19 (19%).

Overall, three in five (61%) construction workers in the South West have qualifications equivalent to Level 2 or above, in line with 2018/19 and the UK average (both 61%).

## Geographic mobility

### Work history in the region/nation

When asked what made them decide to work in the region/nation that they are currently working in, construction workers in the South West were most likely to say it is because they grew up there (59%), but this has declined compared to 2018/19 (68%), although it is above the 2022 UK average (46%). There has been a corresponding increase in the proportion who say their employer sent them there, from 17% to 34% in the latest survey, although this is below the 2022 UK average (47%).

Half (50%) of construction workers in the South West have worked within their current region for their whole career, returning this to the level seen in 2015 (50%), following a dip in 2018/19 (43%), and now placing the region in line with the UK average (49%). A further third (33%) have worked in their current region for most of their career, meaning that 83% have remained in the South West for all or most of their career, in line with previous years and the UK average (all 83%).

Similarly to 2018/19 and 2015, construction workers in the South West are among the most likely to state that their last site was in the same region (84%).

### Worker origins

Again, similarly to 2018/19 and 2015, construction workers in the South West are among the most likely to be interviewed in the same region/nation in which they were living when they started their construction career (81%), and this proportion is higher than in 2018/19 and 2015 (both 76%).

### Travel to site

A third (32%) of construction workers in the South West have worked no more than 20 miles away, continuing an upward trend since 2015 (16%) and 2018/19 (28%), and in line with the 2022 UK average of 33%.

A further third (32%) have worked between 21 and 50 miles away, in line with 2018/19 and 2015 (both 31%), and with the 2022 UK average (34%).

This leaves a third (32%) who have worked more than 50 miles away from their permanent or current home, in line with the UK average (32%), including 14% who have worked more than 100 miles away (compared to a UK average of 12%).

The average furthest distance travelled is 47 miles in the South West, similar to the UK average of 46 miles.

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 15 miles, further than in 2018/19 (12 miles) but nearer than in 2015 (24 miles) and 2012 (26 miles). In 2022, it is in line with the UK picture, where the average distance is 16 miles.

Over half (53%) of those providing a response travel less than 10 miles to work, compared to the 63% who did so in 2018/19, 46% travel between 10 and 49 miles, compared to 36% in 2018/19, and the remaining 2% travel further than this, compared to 1% in 2018/19.

### **Use of temporary accommodation**

In the South West, less than one in twenty (3%) construction workers reported that they are currently staying in temporary accommodation while working at their site, fewer than in previous years (5% in 2018/19 and 6% in 2015), and compared to the UK average (5%).

### **Site duration and change**

All the workers in the South West who are currently employed on a temporary basis (22% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 4% who expect to work for up to two weeks, 7% who expect to work for two to four weeks, 23% for one to six months, 20% for six months to a year, and 22% for more than a year, which is significantly higher than the UK average of 11%.

A quarter (24%) do not know how much longer they expect to be working, which is a lower proportion than 2018/19 (36%), and compared to the UK average (32%).

Overall, 7% of construction workers in the South West do not expect to work on that site for more than a month, continuing the downward trend since 2015 (24%) and 2018/19 (18%). Just 1% believe they will be there for less than a week (compared to 6% in 2018/19).

Close to half (48%) anticipate being on site for more than a month but less than a year, in line with the 49% who did so in 2018/19, and the 2022 UK average of 53%.

One in five (20%) expect to be on site for more than a year, in line with 2018/19 (18%), but significantly higher than the UK average of 13%.

A quarter (25%) are uncertain in this regard, somewhat higher than 2018/19 (15%), but in line with the 2022 UK average of 22%.

While a majority (63%) of all construction workers in the South West are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis, this suggests less certainty and confidence than in 2018/19 (78%), with the region being below the UK average in this respect (69%).

### **Sub-sector and sector mobility**

#### **Sub-sector mobility**

New housing continues to be the most common type of construction work undertaken (84%, compared to 81% in 2018/19), and to a greater extent than the UK average (78%).

This is followed by private industrial work (32%), commercial work (31%), housing repair and maintenance (29%), public non-housing work (29%) and infrastructure projects (17%).

This places the South West below the UK average in relation to commercial work, housing repair and maintenance and infrastructure projects (39%, 42% and 23% respectively).

In terms of the number of types of work undertaken, the results are in line with the UK average, with 47% undertaking one type, 19% two types, 20% three or four types, and 10% more than this.

### **Leaving the sector**

More than three quarters (78%) of construction workers in the South West think it is likely that they will still want to do so, including 35% who say they definitely will be, and 33% who think it is very likely. This is slightly lower than the UK average of 82%. The proportion who say it is unlikely that they will still want to work in construction in five years' time in the region is the same as the UK average (of 7%).

## Introduction

### Aims and objectives

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

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

The specific objectives of this research project are to:

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

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

This report discusses the findings within the South West region.

## Method

The 2022 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2018/19. Overall, 3,005 interviews with construction workers in site-based roles across the UK were required, split between the 12 standard regions/nations. In total, 201 interviews were conducted in the South West.

### Sampling

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

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

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

Project eligibility criteria were:

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

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

### Telephone-based site recruitment

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

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

### Site visits

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

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

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

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

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

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

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

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



### Methodological points to note

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

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

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

### Notes on reading this report

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

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

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

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

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

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

## Profile of construction site workers

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

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

### Personal demographics

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

#### Gender

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

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

*Base: All respondents*

	<b>SW 2022</b>	<b>UK 2022</b>	<b>UK Workforce*</b>
	<b>%</b>	<b>%</b>	<b>%</b>
Male	96	97	52
Female	1	2	48
Transgender	<0.5	<0.5	-
Non-binary	-	<0.5	-
Prefer not to say	2	<0.5	-
<i>Unweighted bases</i>	<i>201</i>	<i>3,005</i>	<i>33,808,600</i>

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

## Age

Within the South West, the youngest age group (16 to 24 year olds) accounts for close to a quarter of construction workers (24%), a directional increase on 2018/19 (18%), and a larger proportion than the survey data for the UK overall in 2022 (19%) and the UK workforce overall (13%).

The proportion aged 25 to 44 is in line with 2018/19, 2015 and 2012 (49% compared to 47%, 46% and 52% respectively) and the UK average (50%), and lower than the UK workforce overall (56%).

Those aged 45 to 59 account for 22%, in comparison to 31% in 2018/19 and 26% in 2015 and lower than the 28% in the UK workforce overall.

Just 2% are aged 60 or over, lower than the UK average (6%).

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

Base: All respondents

	SW 2022 %	SW 2018/9 %	SW 2015 %	SW 2012 %	UK 2022 %		UK Workforce* %
16 to 19 years	7	6	8	6	6	16 to 19 years	4
20 to 24 years	17	12	14	15	13	20 to 24 years	9
25 to 34 years	25	25	28	29	26	25 to 34 years	23
35 to 44 years	24	22	18	23	24	35 to 49 years	33
45 to 54 years	15	24	20	18	17	50 to 64 years	28
55 to 59 years	7	7	6	8	8		
60+ years	2	3	5		6	6	65+ years
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>407</i>	<i>3,005</i>		<i>33,808,600</i>

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

## Ethnicity

In terms of ethnicity, the vast majority of construction workers in the South West continue to be of White origin (94% compared to 95% in 2018/19, 98% in 2015 and 2012).

On this basis, 3% are of Black, Asian or Mixed origin, lower than the UK average (7%) and the UK working age population (12%).

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

Base: All respondents

	SW 2022 %	SW 2018/9 %	SW 2015 %	SW 2012 %	UK 2022 %	UK population aged 16 to 64* %
White	94	95	98	98	91	84
Black	0	1	1	<0.5	2	4
Asian	0	0	<.0.5	<0.5	2	6
Mixed	2	2	-	-	1	2
Other/Not stated	<0.5	1	<0.5	2	3	4
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>407</i>	<i>3,005</i>	<i>41,439,500</i>

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

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

At 3%, the proportion of South West construction workers of ethnic minority origin is lower than the UK average (7%) and the total South West proportion of residents of an ethnic minority group aged 16 to 64 (6%).

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

Base: All respondents

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

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

## Country of origin

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

As was the case in 2018/19, the majority of construction workers in the South West (95%, compared to 91% in 2018/19) originated from the UK and the remaining 5% originated from another country, 2% from within the EU, and 2% from outside the EU.

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

Base: All respondents

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

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

### Holding of passports

Around one in twenty (4%) construction workers in the South West hold a passport for another country, which compares with 7% in 2018/19, and with the UK average of 13%. The majority hold a UK passport (80%), with a further 13% reporting that they do not have a passport, higher than the UK average of 7%.

### Length of time living in the UK

In line with 2018/19, the majority of South West construction workers have lived in the UK all of their life (87% compared to 86% in 2018/19). As was the case in 2018/19, this is higher than the UK average of 80%. Of the 9% who have not lived in the UK all their lives, the vast majority (8%) have lived in the UK more than five years.

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

Base: All respondents

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

Q39

### Disability

Amongst all construction workers in the South West, 3% report that they have a long-term illness, health problem, or disability which limits the type of work they can do (as compared to 5% in 2018/19), in line with the UK average of 3%.

## Occupational profile

### Current job role

All workers were asked what their current trade or occupation is at their site. Respondents in a supervisory role were asked to detail their trade/occupation background, as their supervisory roles would be asked about later in the survey. Figure 8 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from the 2018/19 and 2015 surveys.

As in the 2018/19 and 2015 surveys, labourers/general operatives account for the highest proportion of construction workers in the South West, (16%, compared to 17% in 2018/19 and 22% in 2015), and in line with the UK average (18%).

Bricklayers, ground workers, carpenters/joiners, site managers and plant/machine operatives each account for around one in ten construction workers (13%, 10%, 9%, 9% and 8% respectively). Again, these are largely in line with the UK average.

### Figure 8: Occupational profile

Base: All respondents. Mentions 1%+

	SW 2022 %	SW 2018/19 %	SW 2015 %	UK 2022 %
Labourer/General operative	16	17	22	18
Bricklayer	13	11	20	10
Ground worker	10	-	-	5
Carpenter/joiner	9	9	10	9
Site manager	9	8	8	9
Plant/machine operative (e.g. Fork lift/JCB)	8	6	5	9
Electrician	6	6	6	5
Roofer	5	3	2	3
Scaffolder	4	5	4	3
Pipe fitter	2	2	<0.5	1
Plumber	2	-	-	3
Supervisor/foreman	1	1	1	2
Banksman/Banksperson	1	1	1	2
Floorer	1	1	1	1
Steel erector/rigger	1	1	2	2
Technical e.g. surveyor, maintenance technician	1	2	2	3
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>3,005</i>

Q5



### Supervisory roles

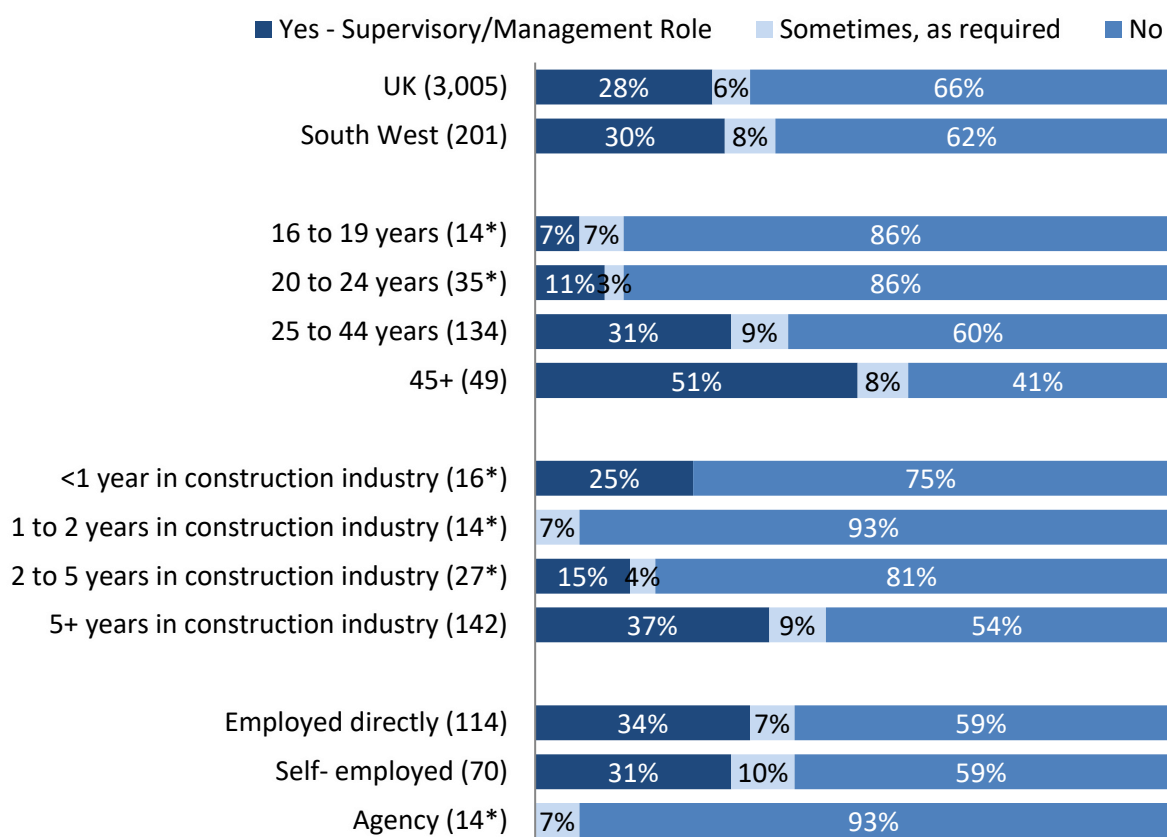
Three in ten (30%) construction workers in the South West say they perform a supervisory or management role on their site in line with 2018/19 (30%) and the UK average (28%). As was the case previously, the incidence of workers in a supervisory role increases with age, from 7% of 16 to 24 year olds to 51% of those aged 45+.

Similarly, a higher than average proportion of those who have worked in the construction industry for more than 5 years have supervisory roles (37%).

Workers employed on a permanent basis are more likely than average to perform a supervisory role (36%).

**Figure 9: Whether respondents perform a supervisory or management role**

Base: All respondents



Q8. Unweighted bases in parentheses

\* Caution: low base

### Employment status

Around a third (35%) of construction workers in the South West are self-employed, a directional decrease on 2018/19 (40%), placing the South West below the UK average of 42%.

There has been a significant increase in the proportion who report being directly employed since 2018/19, from 47% to 57%, placing the South West above the UK average of 48% in 2022 in this respect.

Fewer than one in ten (7%) report working for an employment agency, which is slightly lower than the UK average (9%).

### Figure 10: Employment status

Base: All respondents

	SW 2022 %	SW 2018/19 %	SW 2015 %	UK 2022 %	Years working in construction %			
					<1	1-2	2-5	5+
Employed directly by a company (contractor or sub-contractor)	57	47	67	48	44	43	67	58
Self-employed	35	40	26	42	44	43	22	35
Working for an employment agency	7	13	7	9	13	14	7	6
Working on some other basis	1	0	<0.5	1	0	0	4	1
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>3,005</i>	<i>16*</i>	<i>14*</i>	<i>27*</i>	<i>142</i>

Q20

\* Caution: low base

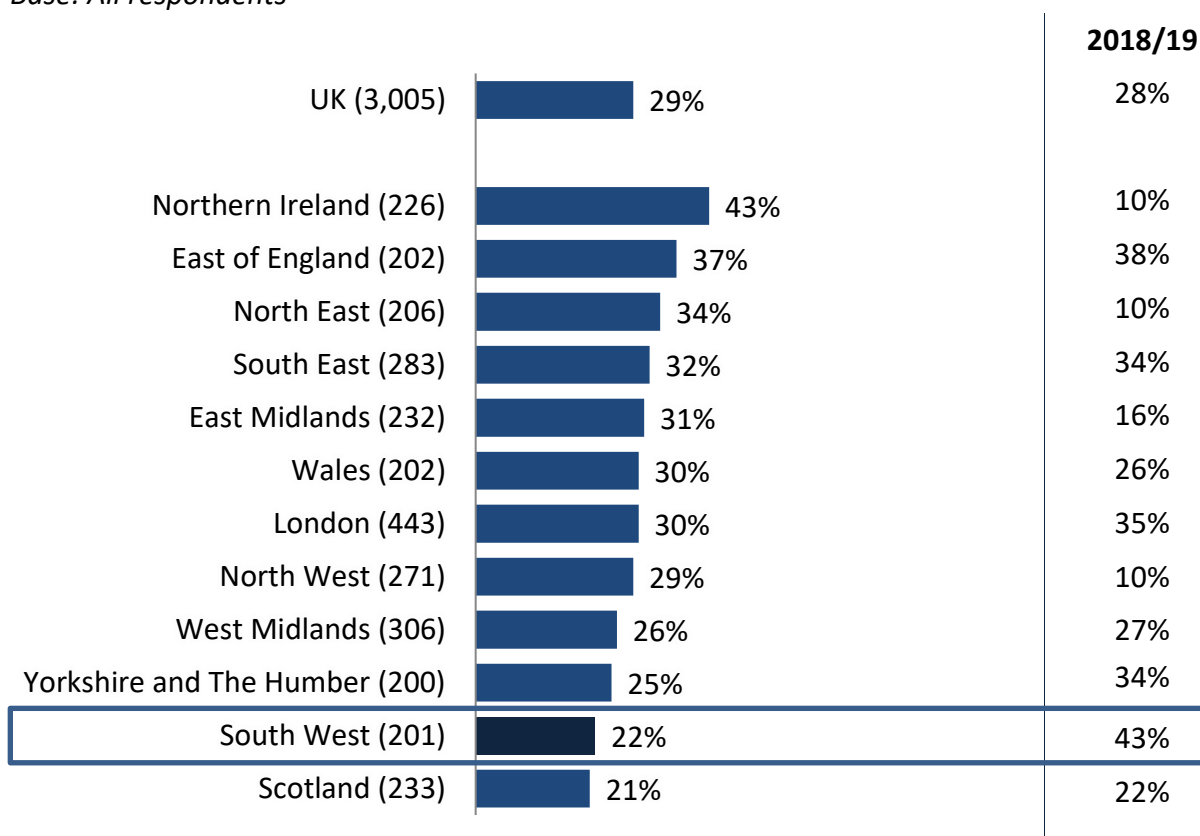
### Employment contract basis

Just over a fifth (22%) of construction workers in the South West are employed on a temporary, rather than a permanent basis (74%).

This represents a significant decrease on the 43% who reported being in temporary employment in 2018/19, where the South West had the highest proportion of workers employed on this basis of any region/nation. This year, only Scotland has a lower proportion of temporary workers.

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

Base: All respondents



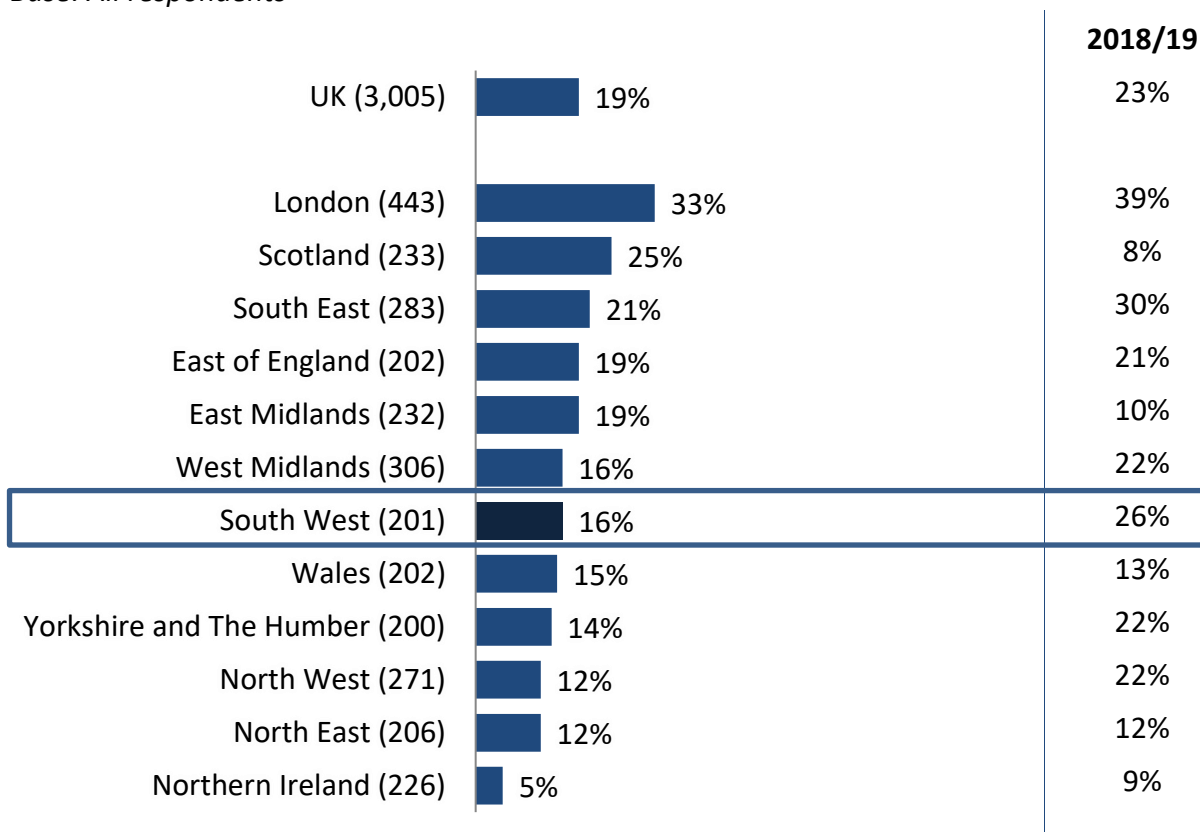
Q21. Unweighted bases in parentheses

### Hours worked

Construction workers in the South West, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (70%, compared to a UK average of 59%), while 16% work more than 50 hours a week, down on 2018/19 (26%), but broadly in line with the UK average of 19%.

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

Base: All respondents



Q22. Unweighted bases in parentheses

## Work histories

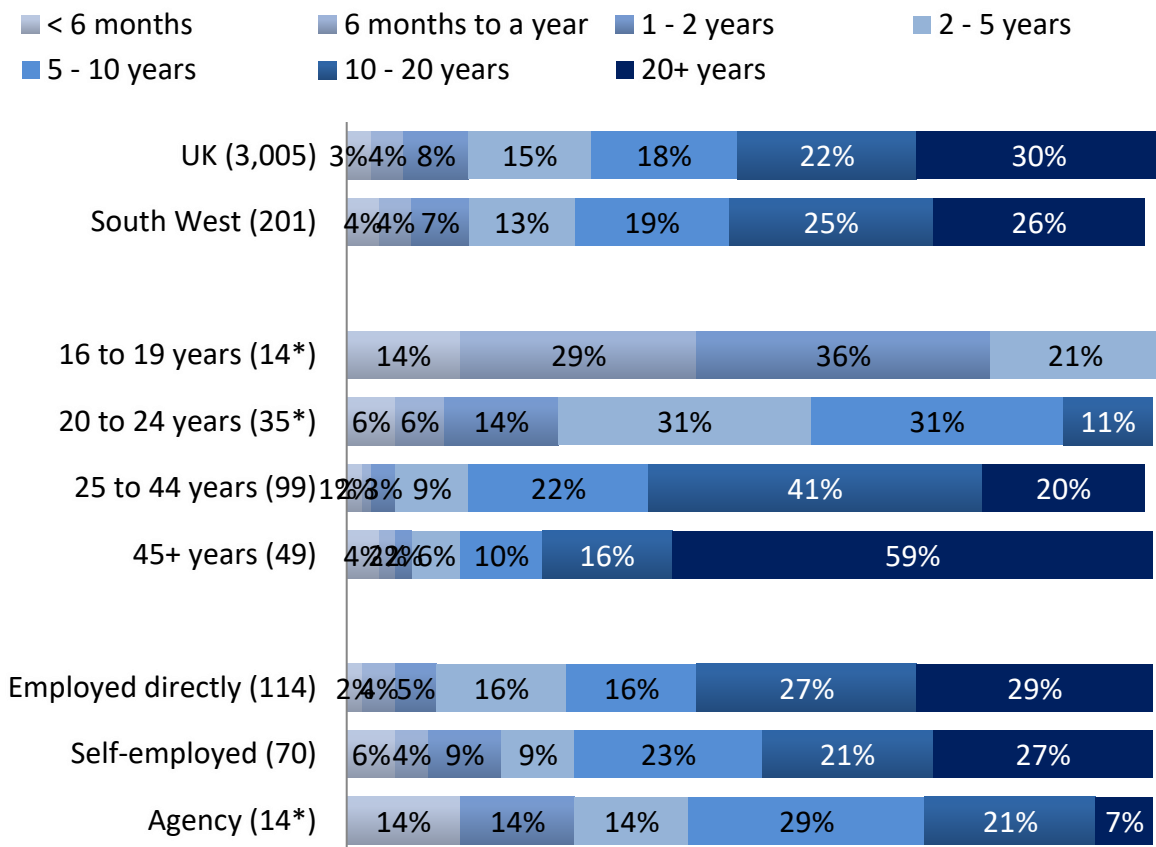
### Time in the sector

A quarter (26%) of all construction workers in the South West have worked in the construction industry for over 20 years, which is lower than in 2018/19 (32%), and compared to the 2022 UK average (30%). While half (51%) have worked in the industry for at least 10 years, which is somewhat down on 2018/19 (60%).

As would be expected, the length of experience in the industry increases with age, with three in five of all construction workers aged 45 and over having more than 20 years' experience of working in the sector (59%, compared to 74% in 2018/19).

**Figure 13: Years spent working in the construction sector**

Base: All respondents



Q1. Unweighted bases in parentheses

\* Caution: low base

## Pre-construction employment histories

The proportion of South West construction workers who have worked pretty much continuously in the industry has remained stable over time at around a half (49%, compared to 48% in 2018/19 and 52% in 2015), remaining lower than the 2022 UK average of 61%.

Consequently, the proportion who have only ever worked in construction has also remained stable over the last three years at 57%, compared to 59% in 2018/19. Again this places the South West below the UK average in this respect (71%).

### Figure 14: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.

All respondents

	SW 2022 %	SW 2018/19 %	SW 2015 %	UK 2022 %	Age %			
					16 - 19	20 - 24	25 - 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	49	48	52	61	50	43	52	49
I have only worked in construction jobs but have had spells of being out of work	5	6	3	6	0	9	5	2
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	14	10	6	8	7	14	12	20
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	23	26	23	18	14	23	25	20
This is my first job. I haven't worked in any other industry.	2	5	11	4	7	3	2	2
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	6	5	3	4	21	9	4	6
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>3,005</i>	<i>14*</i>	<i>35*</i>	<i>99</i>	<i>49</i>

Q2

\* Caution: low base

Overall, 23% of construction workers in the South West say that their first job after full-time education was not in construction and that they moved into the industry after working in other sorts of jobs/sectors.

The most common sectors in which construction workers had started their careers were wholesale and retail trade (19%) and accommodation (17%), with the latter seeing a significant increase since 2018/19 (0%). Manufacturing has seen a significant decline since 2018/19 (7% compared to 51%). This pattern largely reflects that in the UK, with a decline in those who started their careers in manufacturing.

**Figure 15: Industry worked in before starting work in the construction sector**

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

	<b>SW 2022 %</b>	<b>SW 2018/19 %</b>	<b>UK 2022 %</b>
G – Wholesale and retail trade; repair of motor vehicles and motorcycles	19	22	22
I – Accommodation	17	0	10
O – Public admin and defence	12	0	5
N – Administrative and support service activities	8	1	5
C – Manufacturing	7	51	20
H – Transportation and storage	7	0	10
<i>Unweighted bases</i>	<i>59</i>	<i>72</i>	<i>624</i>

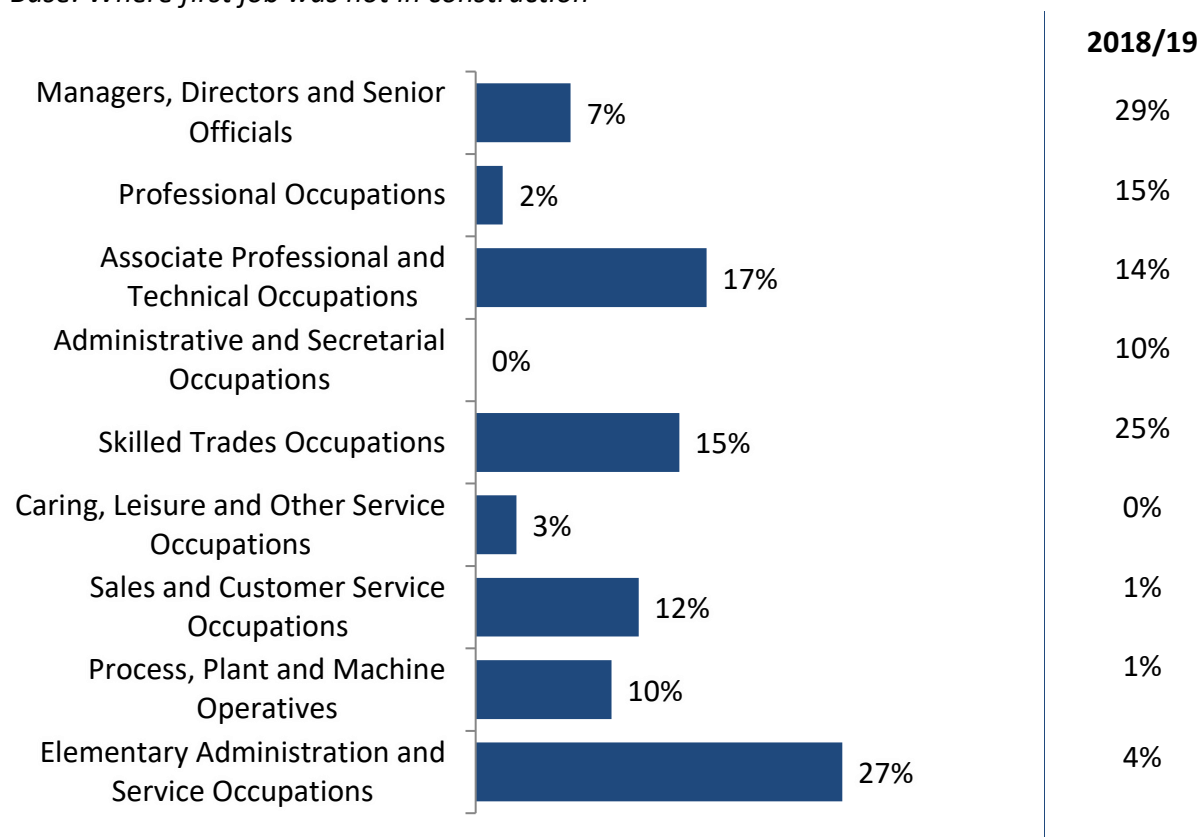
Q3

\* *Caution: low base*

In terms of the job roles that respondents have held in other sectors, the highest proportions were in elementary administration and service occupations (27%), associate professional and technical occupations (17%) and skilled trades occupations (15%).

**Figure 16: Job roles undertaken in other sectors in 2022 compared with 2018/2019**

*Base: Where first job was not in construction*



Q3. Unweighted base (59)



## Occupational switching and progression within construction

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

Overall, two in five (39%) construction workers in the South West have worked in more than one construction trade or occupation whilst working in the construction industry, fewer than in 2018/19 (46%) but broadly in line with the 2022 UK average (35%).

Naturally, the proportion of workers who have had more than one role increases with age, from 7% of those aged under 19 to 51% of those aged 45 or over, and with the length of time respondents have worked in construction, from 19% of those with up to a year's experience to 45% amongst those with 5 or more years of experience.

Amongst this group, 14% had worked in 1 previous role, 44% had worked in 2 previous roles, 34% had worked in 3 roles/occupations and 8% had worked in 4 roles/occupations, much in line with the UK average. Workers are most likely to have previously worked as a labourer/general operative (51%). This is very much in line with the UK average.

### Figure 17: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	SW 2022 %	UK 2022 %
Labourer/General operative	51	39
Banksman/Banksperson	14	7
Carpenter/joiner	13	15
Plant/machine operative (e.g. Fork lift/JCB)	12	10
Bricklayer	9	12
Roofer	6	4
Plumber	6	3
Floorer	6	4
Pipe fitter	5	2
Mechanical fitter	4	2
Dryliner	3	5
Plasterer	3	5
Painter/decorator	3	4
Electrician	3	2
Scaffolder	3	2
Ceiling fixer	1	3
Site manager	1	4
Steel erector/rigger	1	2
Technical e.g. surveyor, maintenance technician	1	2
Insulation specialist	1	2
Other	9	10
<i>Unweighted base</i>	<i>78</i>	<i>1,082</i>

Q7

### Future career plans

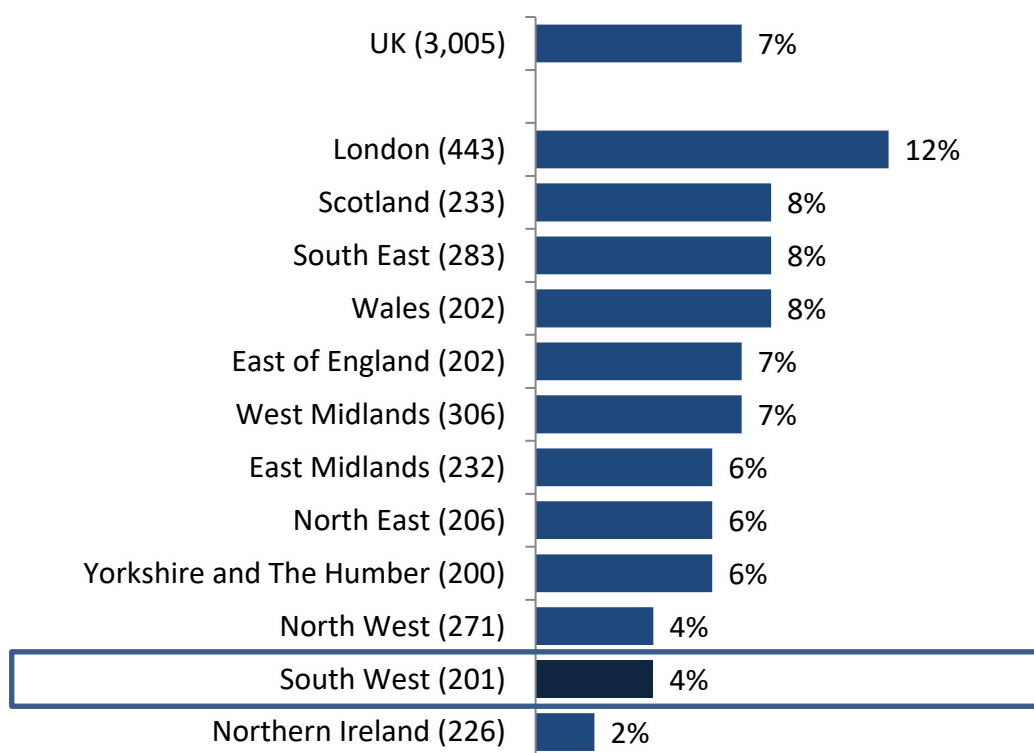
Four in five (80%) construction workers in the South West would like to carry on in the same trade or occupation, in line with 2018/19 and the UK average (both 80%).

Close to one in twenty (4%) would like to change their trade/occupation, lower than 2018/19 (10%) and the 2022 UK average (7%). The remainder would like to leave construction (3%) or were unsure (13%).

Those aged 20 to 24 are more likely than average to want to leave the industry (14%), as are those in temporary positions (9%).

**Figure 18: Proportion of construction workers who would like to change their trade or occupation within the construction sector, by region/nation**

*Base: All respondents*



*Q33. Unweighted bases in parentheses*

## Qualifications and skills

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

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

### Construction skill cards and certificates

Almost all (97%) construction workers in the South West report holding a skill card or certificate (e.g. CSCS or CSR), and this is in line with previous iterations of the survey. Along with Northern Ireland and the North East, this is the highest level of card/certificate holding in the UK. This is also in contrast to the UK-wide picture, where the proportion holding cards/certificates has declined from 97% in 2018/19 to 93% in the latest survey.

#### Figure 19: Proportion of workers who have a skill card/certificate, by region/nation

Base: All respondents

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

Q12

In terms of the type of skill card or certificate held by construction workers in the South West, the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (85%).

Overall, as in 2018/19, 16% hold the CPCS (Construction Plant Competence Scheme), and 3% hold the CISRS (Construction Industry Scaffolders Record Scheme).

### Figure 20: Type of skill card/certificate held

Base: All respondents

	SW 2022 %	SW 2018/19 %	SW 2015 %
CSCS (Construction Skills Certification Scheme) (GB)	85	89	89
CPCS (Construction Plant Competence Scheme)	16	16	12
CISRS (Construction Industry Scaffolders Record Scheme)	3	3	4
CSR (Construction Skills Register) (NI)	<0.5	0	1
Other	8	4	4
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>

Q12

Workers who hold a CSCS card were asked what colour their cards are. Overall, 6% of CSCS card holders have Red cards, three in ten (31%) have Green cards and two in five (37%) have Blue cards. One in eight (13%) have Gold cards, with other types of card held by 5% or less.

### Figure 21: Colour of CSCS card held

Base: Where CSCS card is held

	SW 2022 %	SW 2018/19 %
Red – Trainee	4	6
Red – Experienced worker card	2	3
Green – construction site operative card for general site workers	31	34
Blue – skilled	37	30
Gold – supervisor card	8	7
Gold – Advanced craft/skilled worker	5	7
Black – contracts manager card	5	5
Professionally Qualified Persons Card	2	2
Other	2	2
Unsure	4	2
<i>Unweighted bases</i>	<i>170</i>	<i>246</i>

Q13

## Construction qualifications held

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

Over half (54%) of construction workers in the South West reported having had no construction-related qualifications when they started their first job. This is significantly lower than the 68% who reported this in 2018/19, but higher than the 2022 UK average of 47%.

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

Overall, around two thirds (68%) of construction workers in the South West report holding a construction-related qualification, fewer than the 74% who did so in 2018/19. This reflects the UK-wide picture, where there has been a decrease in the proportion of workers holding a qualification, from 72% in 2018/19 to 69%.

The proportion of workers holding a construction-specific qualification is higher than average among those with five or more years' of experience in the industry (73%) and those employed on a permanent basis (72%).

### Figure 22: Proportion of workers that hold any construction-specific qualification

Base: All respondents

		SW 2022 %	SW 2018/19 %	SW 2015 %	SW 2012 %	UK 2022 %
Total (201)		68	74	72	73	69
Age	16 to 19 years (14*)	43	53	85	48	54
	20 to 24 years (35*)	57	56	78	66	64
	25 to 44 years (99)	76	56	65	81	72
	45+ years (49)	67	67	77	65	69
Length of time in construction	<1 year (16*)	56	26	54	56	46
	1 to 2 years (14*)	43	33	62	45	43
	2 to 5 years (27*)	59	60	75	65	62
	5+ years (142)	73	64	75	77	75
Current contract type	Employed directly (114)	72	67	73	72	69
	Self-employed (70)	66	58	74	75	74
	Agency (14*)	50	41	59	71	50
<i>Unweighted bases for 2022 in parentheses</i>						

Q15/Q16

## Type of construction qualifications held

Based on the qualifications that workers had when they first started working in the construction industry and any they have gained since, Figure 23 summarises the types of qualifications that workers hold and compares the figures to previous surveys (amongst those who have any qualifications and who provided a response).

As in previous years, the qualifications most likely to be held by construction workers in the South West are NVQ/SVQ qualifications (80%), and to an even greater extent than 2018/19 (63%).

One in eight (13%) construction workers with qualifications hold City & Guilds qualifications (compared to 17% in 2018/19 and 21% in 2015), whilst 9% hold an apprenticeship, in line with 2018/19 (10%) and the UK average (11%), but significantly lower than in 2015 (21%).

One in twenty (5%) construction workers with qualifications hold an HNC/HND/BTEC Higher, and just 2% hold a Construction Award or a degree.

### Figure 23: Main type of qualification held

Base: Workers with qualifications (valid responses)

	SW 2022 %	SW 2018/19 %	SW 2015 %	SW 2012 %	UK 2022 %
NVQ/SVQ	80	63	62	71	69
City & Guilds	13	17	21	19	18
Apprenticeship	9	10	21	1	11
HNC/HND/BTEC Higher	5	7	4	0	5
Construction Award	2	Na	Na	Na	3
Degree	2	1	3	0	5
Other	11	29	16	2	12
<i>Unweighted bases</i>	<i>136</i>	<i>106</i>	<i>291</i>	<i>230</i>	<i>2,093</i>

Q15/Q16

## Additional formal training

### Self-assessment of basic skill needs

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

Overall, 16% of construction workers in the South West believe they would benefit from some form of training in basic skills, which is a higher proportion than in 2018/19 (11%) and 2015 (12%). It is slightly lower than the 2022UK average (19%), which has also seen an increase since 2018/19 (11%).

In terms of the type of training required, there is a relatively even split across maths (7%), reading (6%), speaking English (6%), writing (4%) and digital skills (3%).

### Figure 24: Self-assessed need for training in basic skills

Base: All respondents

	<b>SW 2022 %</b>	<b>SW 2018/19 %</b>	<b>SW 2015 %</b>	<b>SW 2012 %</b>	<b>UK 2022 %</b>
ANY	16	11	12	28	19
Maths	7	7	3	14	6
Reading	6	5	7	17	9
Speaking English	6	3	4	12	9
Writing	4	4	4	16	7
Digital skills	3	Na	Na	Na	4
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>3,005</i>

Q37

### Current study for additional construction qualifications

Overall, 12% of all construction workers in the South West are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). While this is in line with the 2022 UK average (13%), it is lower than 2018/19 in the region (19%). As in previous surveys, the likelihood that workers are currently working towards qualifications is reduced with age, from 43% of 16 to 19 year olds to none of those aged 45 or over.

Workers employed directly (18%) continue to be more likely than those who are self-employed (4%) or working for an agency (14%) to be working towards additional construction qualifications. There are no real difference by qualification level.

### Figure 25: Proportion working towards additional construction qualifications

Base: All respondents

		SW 2022 %	SW 2018/19 %	SW 2015 %	UK 2022 %
Total (201)		12	19	15	13
Age	16 to 19 years (14*)	43	41	73	43
	20 to 24 years (35*)	20	32	25	24
	25 to 44 years (99)	12	19	11	11
	45+ years (49)	0	10	3	5
Length of time in construction	<1 year (16*)	25	32	45	28
	1 to 2 years (14*)	29	33	50	27
	2 to 5 years (27)	30	33	28	20
	5+ years (142)	6	14	6	8
Contract type	Employed directly (114)	18	28	21	15
	Self- employed (70)	4	12	4	10
	Agency (14*)	14	11	8	8
Highest qualification level	None (46*)	17	21	11	11
	Level 1 (14*)	14	67	47	17
	Level 2 (55)	7	23	22	12
	Level 3 (52)	15	17	12	11
	Level 4+ (15*)	13	0	3	16
<i>Unweighted bases for 2022 in parentheses</i>					

Q18

\* Caution: low base

Of the 25 construction workers in the South West<sup>1</sup> who are currently studying for a qualification (and who provided a response) around half (48%) are studying for an NVQ/SVQ, one in five (20%) for an apprenticeship, one in eight (12%) for an HNC/HND/BTEC and 4% for City & Guilds.

<sup>1</sup> Number of workers (unweighted)



### Supervisory and managerial qualifications and training

As reported earlier, three in ten (30%) construction workers in the South West perform a supervisory or management role at their site.

Amongst those who do not currently perform supervisory/management roles and have not had this role before, approaching a quarter (23%) want to become a supervisor or manager in the future, in line with 2018/19 (22%), and one in twenty (6%) previously held the role and want to return to that status (fewer than the 11% reported in 2018/19).

Close to half (48%) are certain that they do not want to, lower than the UK average of 59%. The remaining 24% are unsure.

There are few real differences by sub-groups.

#### Figure 26: Whether those who are not currently supervisors want to be one in the future

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

		Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/ depends %
2022 UK (1,982)		17	6	59	18
2022 South West (124)		23	5	48	24
Age	16 to 19 years (12*)	8	0	58	33
	20 to 24 years (30*)	37	0	27	37
	25 to 44 years (59)	25	8	46	20
	45+ years (20*)	5	5	75	15
Length of time in construction	<1 year (12*)	17	8	42	33
	1 to 2 years (13*)	15	0	46	38
	2 to 5 years (22*)	23	0	36	41
	5+ years (77)	26	6	52	16
Contract type	Employed directly (67)	19	7	48	25
	Self-employed (41)	24	2	46	27
	Agency (13*)	38	0	46	15
<i>Unweighted bases in parentheses</i>					

Q9

\* Caution: low base

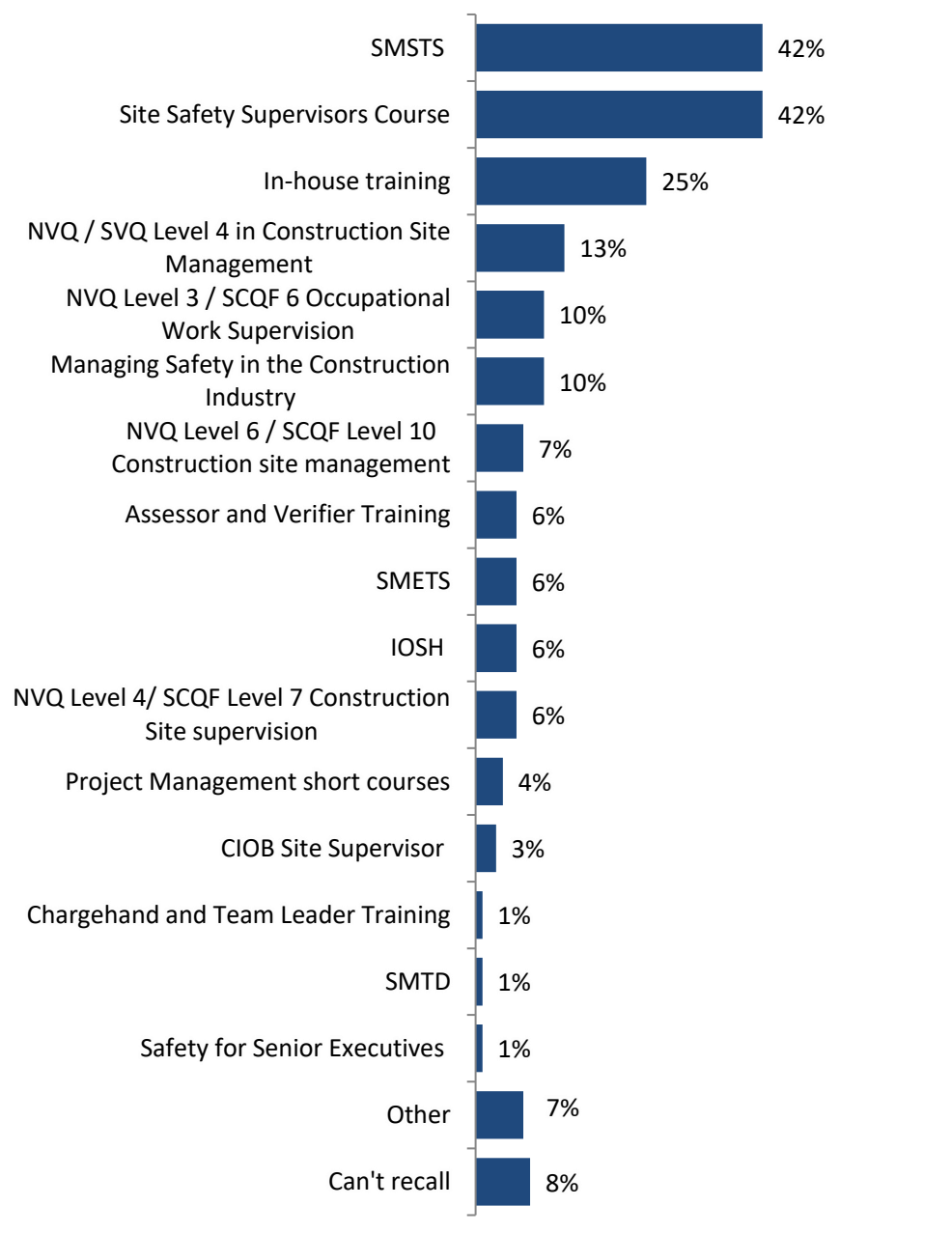
Over a third (36%) of all construction workers in the South West have received formal training designed to improve managerial or supervisory knowledge or skills, in line with the 33% who had in 2018/19, and the 2022 UK average of 33%. Among those who have or have had some form of supervisory or management responsibilities, just over four in five (82%) have received formal training, in line with 2018/19 (80%), and the UK average (80%).

The proportion that has undertaken any managerial or supervisory training is higher than average amongst those aged 45 or over (53%) and those that have worked in construction for at least 5 years (40%).

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) and Site Safety Supervisors Course are the most frequently mentioned (both 42%), followed by in-house training (25%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

**Figure 27: Types of managerial/supervisory training undertaken**

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



Q11. Unweighted base = 72

### 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 28 below.

As in previous years, the vast majority (97%) of construction workers in the South West have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 3% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

At 12%, the proportion of construction workers who are working towards a construction qualification in the South West is largely in line with the UK average (13%), but lower than 2018/19 (19%).

#### Figure 28: Qualification status summary

Base: All respondents

	SW 2022 %	SW 2018/19 %	SW 2015 %	SW 2012 %	UK 2022 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	97	99	99	98	96
Holds a formal construction qualification or a skills card/certificate	97	99	98	98	96
Holds a skills card/certificate	97	97	96	97	93
Holds a skills card/certification but no other qualification	19	18	23	42	19
Working towards a qualification	12	19	15	15	13
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>3,005</i>

Q12/Q15/Q16/Q18

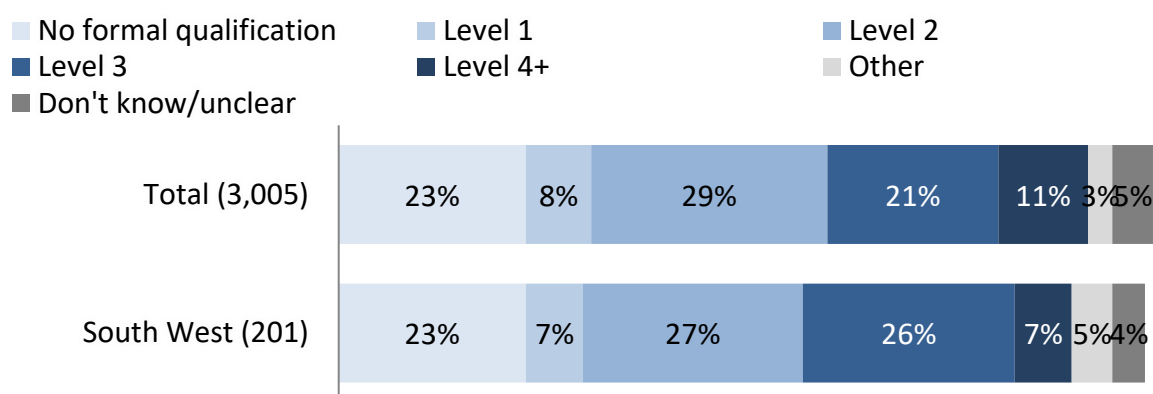
Based on all questions relating to qualifications it is possible to calculate each worker’s highest qualification level, and Figure 29 summarises construction workers’ highest level of qualification, overall and by occupation.

Overall, three in five (61%) construction workers in the South West have qualifications equivalent to Level 2 or above, in line with 2018/19 and the UK average (both 61%).

Those who have worked in the industry for five or more years are more likely to hold qualifications equivalent to Level 2 or above (66%), as are those in permanent positions (72%).

**Figure 29: Current qualification level, by occupation**

Base: All respondents who provided a valid response



Q15/Q16. Unweighted bases in parentheses

\* Caution: low base

## Geographic mobility

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

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

## Work history in the current region/nation

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

While still the most common reason, the proportion saying it is because they grew up there has declined from 68% to 59% in the latest survey, although this remains above the UK average of 46%.

There has been a corresponding increase in the proportion who say their employer sent them there, from 17% to 34% in the latest survey, although this remains below the UK average of 47%.

### Figure 30: Reasons for choosing to work in current location – prompted, multiple response

Base: All respondents

	SW 2022 %	SW 2018/19 %	SW 2015 %	UK 2022 %
You grew up here/have always lived here	59	68	64	46
Employer sent you here	34	17	22	47
Family reasons	7	11	9	5
Came to the area to take up this or another job	4	3	4	5
Construction work is better paid in this area	4	3	4	4
There are more jobs available in this area	2	3	3	3
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>3,005</i>

Q28

Half (50%) of construction workers in the South West have worked within their current region for their whole career, returning this to the levels seen in 2015 (50%) following a dip in 2018/19 (43%), and placing the region in line with the UK average (49%).

A further third (33%) have worked in their current region for most of their career, meaning that 83% have remained in the South West for all or most of their career, in line with previous years and the UK average (all 83%).

**Figure 31: Proportion of construction workers' career worked in current region/nation**

*Base: All respondents*

	<b>SW 2022 %</b>	<b>SW 2018/19 %</b>	<b>SW 2015 %</b>	<b>SW 2012 %</b>	<b>UK 2022 %</b>
All of your time	50	43	50	48	49
Most of it	33	40	33	34	34
Around half your time	6	6	7	9	8
A small proportion of your time	6	8	6	6	5
Only on this job (this is the first site you've been to in this region/nation)	<0.5	2	3	1	1
Don't know	4	0	2	1	3
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>3,005</i>

Q26/Q27

In the South West, close to three in five construction workers (57%) indicate their employer operates nationwide, lower than the UK average of 73%.

### Region/nation worked in before current site

Thinking about the last construction site they worked on before their current one, in the majority of cases, workers' last sites are in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 32 illustrates.

Similarly to 2018/19 and 2015, construction workers in the South West are among the most likely to state that their last site was in the same region (84%).

### Figure 32: Region/nation currently working in compared with the region/nation of workers' immediately previous construction sites

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

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

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.

Again, similarly to 2018/19 and 2015, construction workers in the South West are among the most likely to be interviewed in the same region/nation in which they were living when they started their construction career (81%), and this proportion is higher than in 2018/19 and 2015 (both 76%).

### Figure 33: Region/nation currently working in compared with workers' region/nation of residence prior to first starting work in construction

Base: All respondents \*denotes less than 0.5%

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

Q40



## Travel to site

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

The majority (92%) of construction workers in the South West were interviewed on a site that was located within the same region/nation as their permanent home, as was the case in 2018/19 (94%). This is higher than the average across all regions of 85%.

Of the 8% who travel outside of their region to their current site, almost all (7%) are from a neighbouring region, as this is the pattern for most other regions.

### Furthest distance worked in last 12 months

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

A third (32%) of construction workers in the South West have worked no more than 20 miles away, continuing an upward trend since 2015 (16%) and 2018/19 (28%), but remaining in line with the UK average of 33%.

A further third (32%) have worked between 21 and 50 miles away, in line with 2018/19 and 2015 (both 31%), and with the UK average of 34%.

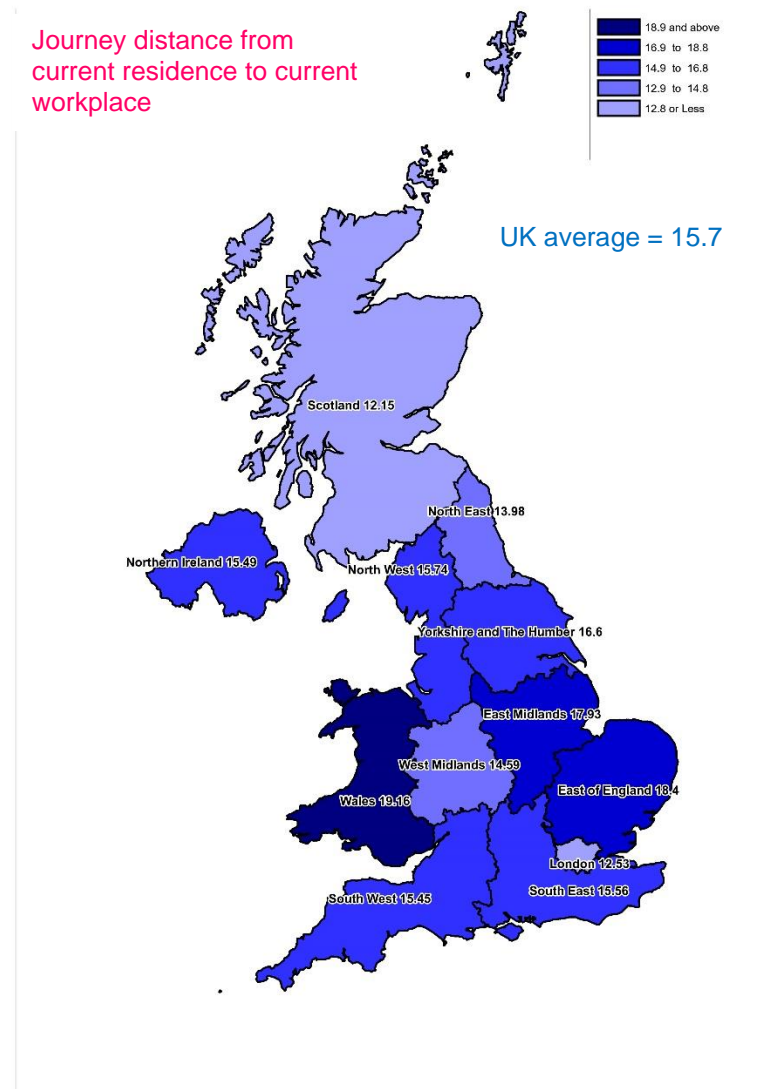
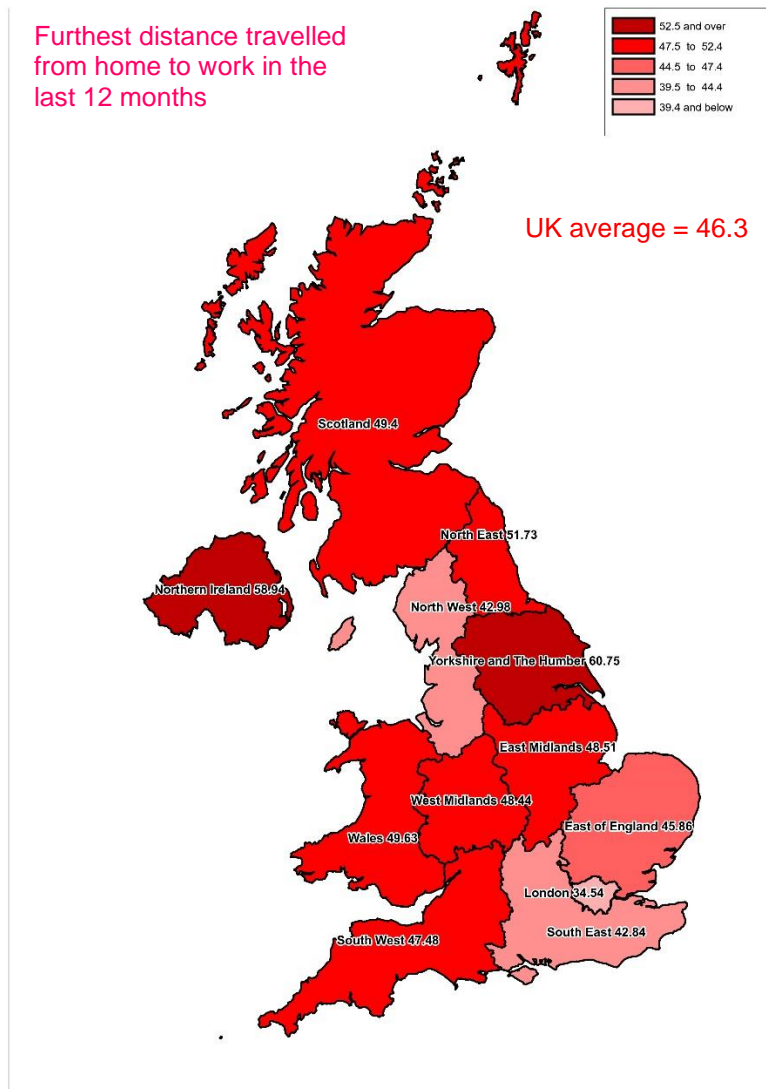
This leaves a third (32%) who have worked more than 50 miles away from their permanent or current home, in line with the UK average (32%), including 14% who have worked more than 100 miles away, again in line with the UK average (12%).

The average furthest distance travelled is 47 miles in the South West, similar to the UK average of 46 miles.

### Journey distance to work

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 15 miles, a slightly longer distance than in 2018/19 (12 miles) but nearer than in 2015 (24 miles) and 2012 (26 miles). It is in line with the UK picture, where the average distance is 16 miles.

Over half (53%) of those providing a response travel less than 10 miles to work, compared to the 63% who did so in 2018/19, 46% travel between 10 and 49 miles (compared to 36% in 2018/19), and the remaining 2% travel further than this (compared to 1% in 2018/19).



### Use of temporary accommodation

In the South West, fewer than one in twenty (3%) construction workers report that they are currently staying in temporary accommodation while working at their site, with a slightly lower proportion than in previous years (5% in 2018/19 and 6% in 2015), and compared to the 2022 UK average (5%).

### Expected site/phase duration

All the workers in the South West who are currently employed on a temporary basis (22% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 4% who expect to work for up to two weeks, 7% who expect to work for two to four weeks, 23% for one to six months, 20% for six months to a year, and 22% for more than a year, which is significantly higher than the UK average of 11%.

A quarter (24%) do not know how much longer they expect to be working, somewhat lower than 2018/19 (36%), and the 2022 UK average (32%).

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

Overall, 7% of construction workers in the South West do not expect to work on that site for more than a month, continuing a downward trend since 2015 (24%) and 2018/19 (18%). Just 1% believe they will be there for less than a week (compared to 6% in 2018/19).

Close to half (48%) anticipate being on site for more than a month but less than a year, in line with the 49% who did so in 2018/19, but lower than the 2022 UK average of 53%.

One in five (20%) expect to be on site for more than a year, in line with 2018/19 (18%), but significantly higher than the 2022 UK average of 13%.

A quarter (25%) are uncertain in this regard, somewhat higher than 2018/19 (15%), but broadly in line with the UK average of 22%.

**Figure 34: Length of time workers expect to work at that specific site during current phase***Base: All respondents*

	<b>SW 2022 %</b>	<b>SW 2018/19 %</b>	<b>UK 2022 %</b>
Less than a week	1	6	2
1-2 weeks	1	4	3
2-3 weeks	2	4	3
3-4 weeks	2	4	4
1-3 months	13	15	11
3-6 months	14	23	17
6-12 months	20	11	25
More than a year	20	18	13
Don't know	25	15	22
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>3,005</i>

Q24

**Expected next site location**

More than three fifths of construction workers in the South West are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis, and this is lower than in 2018/19 (78%), and below the 2022 UK average (69%).

The proportion who are sure that this will not be the case has remained stable (4% compared to 5% in 2018/19), while the proportion who say it depends where the work is has increased, from 12% in 2018/19 to 25% in the latest survey, above the UK average (20%).

The remaining 7% do not know.

## Sub-sector and sector mobility

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

### Sub-sector mobility

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

New housing continues to be the most common type of construction work undertaken (84%, compared to 81% in 2018/19), and to a greater extent than the UK average (78%).

This is followed by private industrial work (32%), commercial work (31%), housing repair and maintenance (29%), public non-housing work (29%) and infrastructure projects (17%).

Each of these have seen a significant decline since 2018/19 (53%, 53%, 56%, 60% and 40% respectively), returning to levels seen in 2015 (30%, 34%, 36%, 33% and 23% respectively).

This places the South West below the UK average in relation to commercial work, housing repair and maintenance and infrastructure projects (39%, 42% and 23% respectively).

In terms of the number of types of work undertaken, the results are in line with the UK average, with 47% undertaking one type, 19% two types, 20% three or four types, and 10% more than this.

**Figure 35: Type of projects on which workers have spent significant periods of time**  
**Base: All respondents**

	<b>SW 2022 %</b>	<b>SW 2018/19 %</b>	<b>SW 2015 %</b>	<b>SW 2012 %</b>	<b>UK 2022 %</b>
New housing	84	81	83	76	78
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	32	53	30	48	35
Commercial work such as shops, office, pubs etc	31	53	34	51	39
Housing repair and maintenance including extensions/loft conversions	29	56	36	46	42
Public non-housing work such as schools, sports facilities, landscaping	29	60	33	52	32
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	17	40	23	35	23
Off-site manufacturing	6	Na	Na	Na	6
ONE TYPE ONLY	47	23	47	28	42
TWO TYPES	19	14	15	16	17
THREE TYPES	12	13	11	15	13
FOUR TYPES	8	14	8	13	9
FIVE TYPES	9	17	8	13	9
SIX TYPES	1	18	10	15	6
<i>Unweighted bases</i>	<i>201</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>3,005</i>

Q4

## Leaving the sector

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

More than three quarters (78%) of construction workers in the South West think it is likely that they will still want to do so, including 35% who say they definitely will be, and 33% who think it is very likely. This is in line with the UK average of 82%.

The proportion of construction workers in the South West who say it is unlikely that they will still want to work in construction in five years' time is the same as the UK average (7%).

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 12% of construction workers aged 45 and over.

### Figure 36: Likelihood of construction workers still wanting to be working in the construction sector in five years' time

Base: All respondents

	All %	Age %			
		16 - 19	20 - 24	25 - 44	45+
Definitely will be	35	36	29	35	41
Very likely	33	29	31	38	27
Quite likely	10	7	11	11	6
Quite unlikely	3	0	9	1	4
Very unlikely	3	0	11	2	0
Definitely will not be	1	7	3	0	0
Hope to be retired	3	0	0	1	12
Don't know	12	21	6	11	10
<i>Unweighted bases</i>	<i>201</i>	<i>14*</i>	<i>35*</i>	<i>99</i>	<i>49</i>

Q38A

\* Caution: low base

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 35% believe they will definitely want to be working in the construction sector, lower than the UK average of 45%, 34% believe it is very likely they will want to be working in the construction sector, and 10% believe it is quite likely they will want to be working in the construction sector. Overall, 79% of this group are likely to some degree to want to be working in the sector, which is lower than the 91% who were in 2018/19.

## The South West construction workforce 2022 summary

### The UK construction industry

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

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

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

### Stability within the construction industry in the South West

However, a substantial proportion of industry workers, as surveyed here, have been in the industry for lengthy periods. Across the UK and in the South West, 70% of workers have worked in the industry for 5 years or more, and this reflects findings from previous surveys. Demographic and other characteristics of the workforce therefore change little overall, and with only 7% of workers in the South West (as across the UK) expecting to leave construction in the next 5 years, changes to the demography of the workforce can occur only at the margin. A doubling of the percentage of female or ethnic minority entrants would have only a minor effect on the overall structure of the workforce.

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

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

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



only 4% of workers within the South West, and 7% of workers across the UK want to change their occupation.

### Some indicators of change

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

However, within the South West, fewer workers reported holding a construction-related qualification in 2022, compared with 2018/19 (68%, compared to 74%), and a lower proportion of workers are working towards qualifications in 2022 compared with 2018/19 (12%, compared to 18%). They are more likely than in 2018/19, however, to have received supervisory or management training (36%, compared to 33%).

There appears to be greater reticence in taking on more responsibility this year than previously, with fewer respondents certain they want to become a supervisor or manager in the future (23% across the UK; 28% in the South West, compared to 30% and 33% respectively in 2018/19), and within the South West, this is despite the higher levels of receipt of supervisory or management training in 2022 (see above).

In the South West the proportion of workers holding industry Skills Cards has remained high (97% in 2022, as in 2018/19), although it has fallen somewhat across the UK over this period (97% to 93%).

Overall, a higher proportion of construction workers in the South West in 2022 than in 2018/19 held construction-related qualifications prior to starting their first job in construction, with more than 54% of construction workers in the South West reporting having no construction-related qualifications when they started their first job, compared to 67% in 2018/19.

However, at the time of interviewing, two-thirds of construction workers in the South West reported holding a construction-related qualification (68%), which is lower than the 74% who did so in 2018/19.

Since 2018/19, within the South West, and contrary to the overall UK trend, the proportion of direct employees in the workforce has increased (from 47% in 2018/19 to 57% in 2022) while self-employment has declined (40% in 2018/19 to 35% in 2022). There is little change in the level of agency employment. Despite this, fewer workers are working towards a qualification in 2022 than in 2018/19 (12% compared to 18%), when one would expect the region to have benefited from more opportunities for employer-led training.

Another area of change identified by the survey concerns working hours. The proportion of workers working more than 50 hours per week has decreased somewhat since 2018/19, from 26% to 16% in the South West (24% to 19% across the UK). The change raises interesting questions as to whether some technological changes are permitting fewer but

more productive hours for some workers; or whether workforce culture, in line with general trends since Covid, is disposing some workers to put personal time ahead of overtime hours; or, simply, whether demand pressures in the industry are lower.

While the survey identified that across the UK fewer workers are travelling long distances to work (32% had worked more than 50 miles from home in 2022, compared to 41% in 2018/19). There has been less change in the South West in this respect; 32% of South West workers had worked more than 50 miles from home in the last year, compared to 40% in 2018/19. The average travel distance to work was 15 miles in 2022 and 12 miles in 2018/19, compared to 16 miles and 18 miles respectively across the UK.

### **Focus on how the South West differs from the UK average**

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

- The South West has a younger workforce within construction than the UK average, with 24% aged under 25 (19% across the UK)
- Fewer construction workers in the South West than across the UK originate from another country (5%, compared to 17%)
- At 57% the South West construction workforce has more directly employed staff than the UK average (48%), and fewer are self-employed (35%, compared to 42%)
- The South West has a lower proportion of construction workers who have worked pretty much continuously in the industry than the UK average (49%, compared to 61%)
- The proportion of workers with no qualifications in the South West that are currently working towards formal qualifications relevant to the construction industry is above the UK average (17%, compared to 11%)
- There is a higher level of confidence or certainty with regard to how long they will continue in their current positions in the South West compared with the UK average, with 24% unsure, compared with a UK average of 32%

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