

Workforce Mobility and Skills in the UK Construction Sector 2022

Wales Report - May 2023



Study prepared by BMG Research from a commission by CITB.

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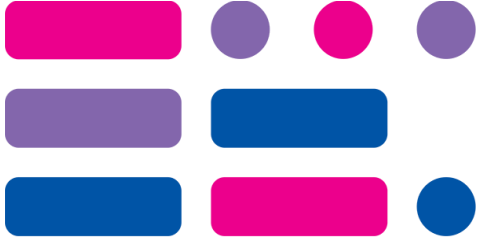
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Executive summary

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 202 interviews were conducted with construction workers in Wales.

Profile of the sample

As in previous years of the survey, the vast majority of construction workers in manual roles interviewed in Wales were male (97%), in line with the UK average.

Within Wales, 19% of construction workers are aged 16 to 24, a quarter (27%) are aged 25 to 34, one in five (20%) are aged 35 to 44, and a third (33%) are older than this. The age profile of construction workers in Wales is in line with previous years, and the UK average. However, there are more 16 to 24 year olds than is the case across the UK workforce (13% UK-wide).

At 3%, the proportion of construction workers in Wales of ethnic minority origin is much in line with the Welsh working age population (5%).

As was the case in 2018/19, the vast majority of construction workers in Wales (94%, compared to 97% in 2018/19, and a UK average of 83%) originate from the UK and the remaining 6% originate from another country, 3% from within the EU, and 3% from outside the EU.

Reflecting this, just 3% of construction workers in Wales hold a non-UK passport, lower than the UK average of 13%. Over four in five (86%) hold a UK passport, and 9% do not have a passport.

Again, reflecting the results above, nine in ten (90%) of construction workers in Wales have lived in the UK all their lives, higher than the UK average of 80%, but lower than in 2018/19 (94%). Of the 8% who have not lived in the UK all their lives, the majority (6%) have lived in the UK for more than five years.

Amongst all construction workers in Wales, 7% cent report that they have a long-term illness, health problem, or disability which limits the type of work they can do, higher than the 3% who reported this in 2018/19, and the UK average of 3%.

Labourers/general operatives account for 16% of all construction workers in Wales and plant/machine operatives for 14%, with around one in ten working as bricklayers (13%), site managers (11%) and ground workers (7%).

Three in ten (31%) of all construction workers in Wales say they perform a supervisory or management role on their site, up on previous levels (20% in 2018/19 and 22% in 2015), and placing Wales in line with the UK average (28%) in this respect.

Over half (55%) of construction workers in Wales are employed directly, in line with 2018/19, and remaining higher than the UK average of 48%. Close to two in five (37%) are self-employed, again in line with 2018/19 (40%) and with the UK average (42%).

Three in ten (30%) construction workers in Wales are employed on a temporary basis, in line with 2018/19 (26%), and with the UK average (29%), as was the case in 2018/19.

Construction workers in Wales, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (62%, compared with a UK average of 59%), while 15% work more than 50 hours a week, a slightly higher proportion than in 2018/19 (13%), and lower than the UK average of 19%.

Work history

Time in the sector

Three in ten (31%) of all construction workers in Wales have worked in the construction industry for over 20 years, fewer than 2018/19 (39%), and in line with the 2022 UK average (30%). Over half (55%) have worked in the industry for at least 10 years, in line with 2018/19 (58%), and with the UK average (52%).

At 55%, the proportion of construction workers in Wales who have worked pretty much continuously in the industry is slightly lower than in 2018/19 (59%), and compared with the 2022 UK average of 61%. The overall proportion who has only ever worked in construction is lower than previously (67% in 2022 compared to 70% in 2018/19), and compared with the 2022 UK average (71%).

Previous non-construction jobs

Overall, more than one in five (22%) of construction workers in Wales 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, a higher proportion than in 2018/19 (19%), but in line with the UK average in 2022.

The most common sectors in which construction workers had started their careers were wholesale and retail trade; repair of motor vehicles and motorcycles (23%), accommodation (10%) and manufacturing (10%), with a decrease for the latter since 2018/19 (35%), as has been the case across the UK (20% compared to 45% in 2018/19).

In terms of the job roles that respondents have held in other sectors, the highest proportions were in skilled trades occupations (25%), elementary administration and service occupations (25%), process, plant and machine operatives (17%) and sales and customer service occupations (13%).

Occupational switching within the construction sector

Overall, two in five (40%) construction workers in Wales have worked in more than one construction trade or occupation whilst working in the construction industry, significantly higher than 2018/19 (29%), and higher than the UK average (35%) this year.

Amongst this group, 21% had worked in 1 previous role, 41% had worked in 2 previous roles, 28% had worked in 3 roles/occupations and 11% had worked in 4 roles/occupations. Workers are most likely to have previously worked as a labourer/general operative (41%) or as a bricklayer (14%). This is largely in line with the UK average.

Close to one in ten (8%) in Wales would like to change their trade/occupation, in line with 2018/19 and the UK average (both 7%).

Qualifications and skills

Skills cards/certificates

Almost all (95%) construction workers in Wales report holding a skill card or certificate (e.g. CSCS or CSR). Wales is one of only two regions/nations that has seen an increase in this respect since 2018/19 (92%), the other being the North East, with most others seeing a significant decline.

In terms of the type of skill card or certificate held by construction workers in Wales, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (82%), in line with 2018/19 (83%) and 2015 (83%). Close to a quarter (23%) hold the CPCS (Construction Plant Competence Scheme), an uplift on 2018/19 (14%), and higher than the UK average (14%).

Overall 4% of CSCS card holders have Red cards, three in ten (30%) have Green cards, and over a third (36%) have Blue cards. One in eight (13%) have Gold cards and 8% have Black cards, with other types of card held by less than 5%.

Construction-specific qualifications

Overall, around a third (35%) of construction workers in Wales report having had no construction-related qualifications when they started their first job. This is significantly lower than the 70% who reported this in 2018/19, and the 76% who did so in 2015, and is lower than the UK average of 47%.

Overall, two thirds (65%) of construction workers in Wales report holding a construction-related qualification, in line with the 69% who did so in 2018/19, and the UK average (67%).

As in previous years, the qualifications most likely to be held by construction workers in Wales are NVQ/SVQ qualifications (66%), in line with the UK average (69%), and 2018/19 (65%). One in six (18%) hold an apprenticeship, a significant uplift on the 4% who did so in 2018/19, 15% hold City & Guilds qualifications, and 10% hold a degree. Around one in twenty hold HNC/HND/BTEC Higher (7%) or the Construction Award (5%).

Current study for additional construction qualifications

Overall, 17% of all construction workers in Wales are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications), which is higher than in 2018/19 (11%) and the 2022 UK average (13%).

Supervisory and managerial qualifications and training

Amongst those who do not currently perform supervisory/management roles and have not had this role before, 22% want to become a supervisor or manager in the future, somewhat more than the 14% who did so in 2018/19, and one in twenty (6%) previously held the role and want to return to that status (in line with 5% in 2018/19). Over half (53%) are certain that they do not want to, fewer than the UK average of 59%, while close to one in five (19%) are unsure.

Two in five (39%) of all construction workers in Wales have received formal training designed to improve managerial or supervisory knowledge or skills, an increase on the 25% who had in 2018/19, and higher than the 2022 UK average (33%). Among those who have or have had some form of supervisory or management responsibilities, over four in five (84%) have received formal training, again somewhat up on 2018/19 (77%), and higher than the UK average (80%).

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned by those who have undertaken any training (47%), followed by in-house training (32%) and Site Safety Supervisors Courses (28%). These were also the top three most mentioned types of supervisory training in 2018/19, 2015 and 2012.

Self-assessment of basic skills needs

Overall, a quarter (24%) of construction workers in Wales believe they would benefit from some form of training in basic skills, an increase on 2018/19 (10%) and higher than the UK average of 19%, which has also seen an increase since 2018/19 (11%).

Overall skill levels

As in previous years, the vast majority (97%) of construction workers in Wales 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.

The proportion of construction workers in Wales who hold a skill card/certificate, but has no other construction qualification is lower than in 2018/19 (20% compared to 24%), but is in line with the 2022 UK average (19%).

At 17%, the proportion of construction workers who are working towards a construction qualification is somewhat higher than 2018/19 (11%) and 2015 (12%), and the UK average (13%).

Overall, 53% of construction workers in Wales have qualifications equivalent to Level 2 or above, consistent with 2018/19 and 2015 (both 53%), but lower than the 2022 UK average (61%), while 28% have qualifications equivalent to Level 3 or above, again consistent with 2018/19 (27%), but lower than the 2022 UK average (32%).

Geographic mobility

Work history in the region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. Over half (55%) report that it was because their employer sent them there, up on the 40% who did so in 2018/19, and higher than the UK average of 47%. There has been a corresponding decline in the proportion who report that they grew up there, from 57% in 2018/19 to 38% in the latest survey, placing Wales below the UK average (46%) in this respect.

Three in five (61%) construction workers in Wales have worked within their current region for their whole career, similar to 2018/19 (60%), and placing Wales above the UK average in this respect (49%). A further quarter (27%) have worked in their current region for most of their career, meaning that 88% have remained in Wales for all or most of their career, in line with 2018/19 (89%) but higher than the 2022 UK average (83%).

Over four in five (84%) of construction workers in Wales were in the same region as their previous job, in line with 2018/19 (88%), and amongst the highest of any region/nation.

Worker origins

Nine in ten (90%) of construction workers in Wales were interviewed in the same region/nation in which they were living when they started their construction career. This is lower than in 2018/19 (93%), but amongst the highest of any UK region/nation.

Travel to site

At 93%, the proportion of construction workers in Wales who were interviewed on a site that was located within the same region/nation as their permanent home is lower than 2018/19 (98%) but similar to 2015 (93%). It is higher of the UK average (85%). Of the 7% who travel outside of their region to their current site, almost all (4%) are from the South West.

A quarter (25%) of construction workers in Wales have worked no more than 20 miles away, fewer than in 2018/19 (29%), and compared with the 2022 UK average of 33%. A further two in five (38%) have worked between 21 and 50 miles away, much in line with 2018/19 (35%) and the UK average of 34%. A similar proportion (37%) have worked more than 50

miles away from their permanent or current home, including 12% who have worked more than 100 miles away. This compares to 32% and 11% respectively in 2018/19.

The average furthest distance travelled is 50 miles in Wales, slightly higher than the UK average of 46 miles.

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 20 miles, somewhat higher than that reported in 2018/19 and 2015 (both 16 miles), and the national average of 16 miles.

Over a third (34%) of those providing a response travel less than 10 miles to work, fewer than the 38% who did so in 2018/19, and a further third (32%) travel between 10 and 19 miles. Both are lower than the UK average in 2022 (45% and 28% respectively).

Use of temporary accommodation

In Wales, one in twenty (6%) construction workers report that they are currently staying in temporary accommodation while working at their site, in line with 2018/19 (3%) and the UK average (5%).

Site duration and change

All the workers in Wales who are currently employed on a temporary basis (30% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 12% who expect to work for another week or two, 6% expecting another two to four weeks, more than a fifth (22%) for one to six months, a quarter (25%) for six to twelve months, and approaching one in ten (8%) for more than a year. More than a quarter (27%) do not know how much longer they expect to be working, significantly lower than 2018/19 (49%), and compared to the 2022 UK average (32%).

Overall, 16% of construction workers in Wales do not expect to work on that site for more than a month, lower than 2018/19 (24%), but higher than the UK average (12%). Over half (53%) anticipate being on site for more than a month but less than a year, somewhat higher than the 41% who did so in 2018/19, but in line with the UK average of 52%. One in eight (13%) expect to be on site for more than a year, which is significantly up on 2018/19 (7%) but significantly down on 2015 (38%) and 2012 (26%), and compares to a UK average of 16% in 2022. Overall, 14% are uncertain in this regard, lower than 2018/19 (28%), and the 2022 UK average of 22%.

While a majority (70%) of all construction workers in Wales 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 is lower than the 77% who were confident in this respect in 2018/19, but in line with the national average of 69%.

Sub-sector and sector mobility

Sub-sector mobility

New housing continues to be the most common type of construction work undertaken (68%, as in 2018/19) but to a lesser extent than the UK average (78%).

Around a third have undertaken private industrial work (35%) and/or public non-housing work (34%). While each of these are in line with the UK average (35% and 32% respectively), public non-housing work has seen a significant decline in Wales since 2018/19 (60%).

Around three in ten have undertaken commercial work (30%) and housing repair and maintenance (28%), and in both instances this represents a decline on 2018/19 (40% and 42% respectively), and workers in Wales are below the UK average (39% and 42% respectively).

A quarter (25%) have undertaken infrastructure building projects, in line with 2018/19 (26%) and the UK average (23%).

In terms of the number of types of work undertaken, construction workers in Wales are more likely than the UK average to have only worked on one type of project (50% compared to 42%), and this is significantly higher than in 2018/19 (29%).

Leaving the sector

Around four in five (82%) construction workers in Wales think it is likely that they will remain in construction beyond the next five year, which is lower than the UK average (86%).

In line with the UK average, fewer than one in ten (7%) say they definitely will not, or it is unlikely that they will, still want to work in construction in five years' time.

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.

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, 202 interviews were conducted in Wales.

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
East of England	306	7.0
East of England	202	11.2
London	443	13.6
South East	283	15.5
South West	201	8.9
Scotland	233	8.2
Wales	202	4.0
Northern Ireland	226	2.5
UK	3,005	100.0

*Source Annual Population Survey via Nomis: Economically Active adults aged 16+, Oct 2021-Sep 2022; note that total percentage does not add exactly to 100 because of rounding
Further information on sampling and the sites included can be found in the technical report.

Methodological points to note

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

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

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

Notes on reading this report

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

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

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

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

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

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

Profile of construction site workers

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

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

Personal demographics

Figures 2 to 5 detail the demographic profile (gender, age, ethnicity, nationality and disability) of the 2022 sample of construction workers, compared with the 2018/19 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 Wales were male (97%), 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

	Wales 2022 %	UK 2022 %	UK Workforce* %
Male	97	97	52
Female	1	2	48
Transgender	1	<0.5	-
Non-binary	0	<0.5	-
Prefer not to say	2	<0.5	-
<i>Unweighted bases</i>	202	3,005	33,808,600

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

Age

Within Wales, 19% of construction workers are aged 16 to 24, a quarter (27%) are aged 25 to 34, one in five (20%) are aged 35 to 44, and a third (33%) are older than this.

The age profile of construction workers in Wales is in line with previous years, and the UK average. However, there are more 16 to 24 year olds than is the case across the UK workforce (19% compared to 13%).

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

Base: All respondents

	Wales 2022 %	Wales 2018/9 %	Wales 2015 %	Wales 2012 %	UK 2022 %		UK Workforce* %
16 to 19 years	4	6	5	4	6	16 to 19 years	4
20 to 24 years	15	13	17	17	13	20 to 24 years	9
25 to 34 years	27	27	25	29	26	25 to 34 years	23
35 to 44 years	20	22	20	22	24	35 to 49 years	33
45 to 54 years	18	21	24	17	17	50 to 64 years	28
55 to 59 years	7	4	6	11	8		
60+ years	8	5	3		6	65+ years	4
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>428</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 Wales continue to be of White origin (95% compared to 98% in 2018/19, 97% in 2015 and 100% in 2012).

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

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

Base: All respondents

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	Wales 2012 %	UK 2022 %	UK population aged 16 to 64* %
White	95	98	97	100	91	84
Black	<0.5	1	<0.5	<0.5	2	4
Asian	1	<0.5	<0.5	0	2	6
Mixed	1	1	-	-	1	2
Other/Not stated	2	<0.5	2	<0.5	3	4
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>428</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 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 construction workers in Wales of ethnic minority origin is much in line with the working age population in Wales (5%).

Figure 5: Proportion of construction workers of ethnic minority (Non-White) origin*Base: All respondents*

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

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

Country of origin

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 vast majority of construction workers in Wales (94%, compared to 97% in 2018/19, and a UK average of 83%) originate from the UK and the remaining 6% originate from another country, 3% from within the EU, and 3% 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
South West	201	2	2	<0.5	1	0
West Midlands	306	2	6	0	<0.5	<0.5
Yorkshire and the Humber	200	6	3	0	1	1
Wales	202	3	3	0	1	0
Scotland	233	4	2	<0.5	0	0
Northern Ireland	226	4	2	0	0	0

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

Holding of passports

Reflecting the very high proportion of construction workers in Wales that originate from the UK, just 3% hold a non-UK passport, lower than the UK average of 13%.

Over four in five (86%) hold a UK passport, and 9% do not have a passport.

Length of time living in the UK

Thus, the vast majority (90%) of construction workers in Wales have lived in the UK all their lives, higher than the UK average of 80%, but slightly lower than in 2018/19 (94%). Of the 8% who have not lived in the UK all their lives, the majority (6%) have lived in the UK for 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
South West	201	87	1	8
West Midlands	306	91	1	7
Yorkshire and the Humber	200	91	0	9
Wales	202	90	2	6
Scotland	233	92	5	3
Northern Ireland	226	92	2	5

Q39

Disability

Amongst all construction workers in Wales, 7% report that they have a long-term illness, health problem, or disability which limits the type of work they can do, higher than the 3% who reported this in 2018/19, and 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.

Labourers/general operatives account for 16% of all Welsh construction workers and plant/machine operatives for 14%, with around one in ten working as bricklayers (13%), site managers (11%) and ground workers (7%).

Other occupations account for less than 5% of the sample in each instance.

This is much in line with the UK average.

Figure 8: Occupational profile

Base: All respondents. Mentions 2%+

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	UK 2022 %
Labourer/General operative	16	21	22	18
Plant/machine operative (e.g. Fork lift/JCB)	14	12	8	9
Bricklayer	13	15	13	10
Site manager	11	9	10	9
Ground worker	7	4	12	5
Carpenter/joiner	5	13	9	9
Technical e.g. surveyor, maintenance technician	5	4	2	3
Dryliner	3	5	3	3
Roofer	3			3
Electrician	2	4	3	5
Scaffolder	2			3
Steel erector/rigger	2			2
Banksman/Banksperson	2	1	2	2
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>3,005</i>

Q5

Supervisory roles

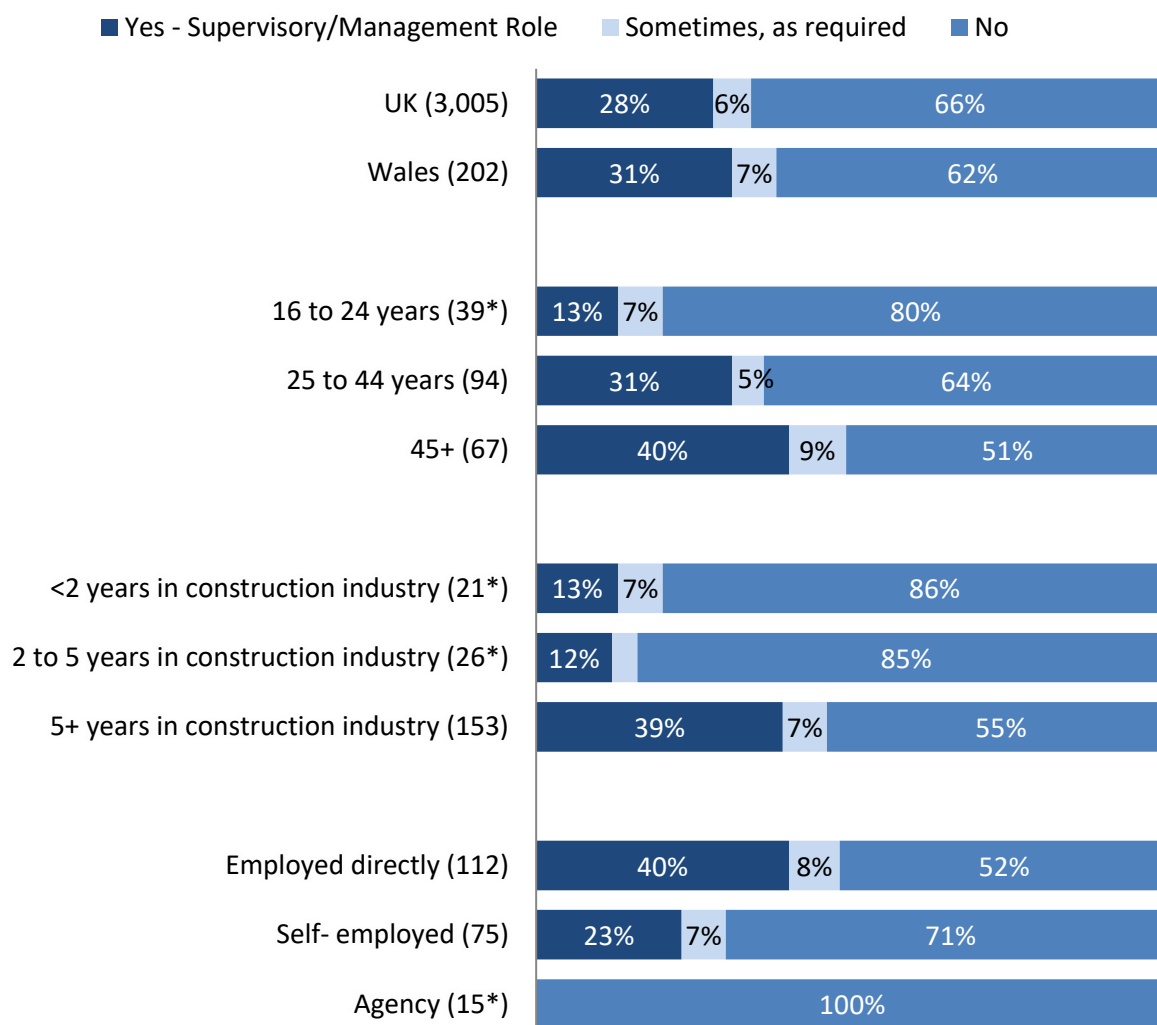
Three in ten (31%) construction workers in Wales say they perform a supervisory or management role on their site, up on previous levels (20% in 2018/19 and 22% in 2015), and placing Wales above the UK average (28%) in this respect.

As was the case previously, the incidence of workers in a supervisory role increases with age, from 13% of 16 to 24 year olds to 40% of those aged 45+, and by length of time in the industry, from 13% of those in the industry for less than five years, to 39% of those in the industry for more than five years.

As would be expected, workers who are directly employed by a company continue to be significantly more likely than those who are self-employed or work for an agency to perform a supervisory role (40% compared to 23% and 0% respectively).

Figure 9: Whether respondents perform a supervisory or management role

Base: All respondents



Q8. Unweighted bases in parentheses

* Caution: low base

Employment status

Over half (55%) of construction workers in Wales are employed directly, in line with 2018/19, and this is higher than the UK average of 48% in 2022.

Close to two in five (37%) are self-employed, again in line with 2018/19 (40%) but lower than the 2022 UK average (42%).

Figure 10: Employment status

Base: All respondents

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	UK 2022 %	Years working in construction %			
					Up to a year	1 to 2 years	2 to 5 years	5+ years
Employed directly by a company (contractor or sub- contractor)	55	50	66	48	73	50	81	50
Self-employed	37	40	27	42	27	20	19	42
Working for an employment agency	7	8	6	9	0	30	0	8
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>3,005</i>	<i>11*</i>	<i>10*</i>	<i>26*</i>	<i>153</i>

Q20

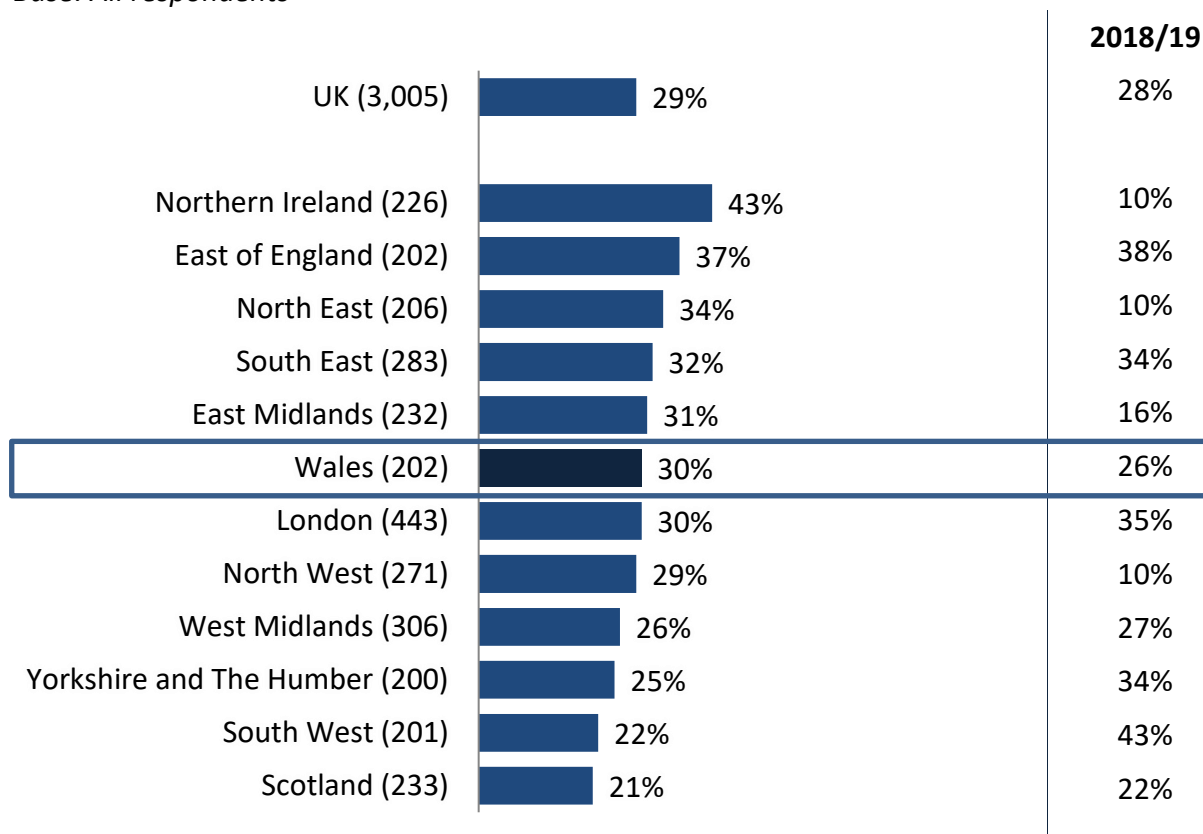
* Caution: low base

Employment contract basis

Three in ten (30%) construction workers in Wales are employed on a temporary basis, a higher proportion than in 2018/19 (26%), but in line with the 2022 UK average (29%).

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

Base: All respondents



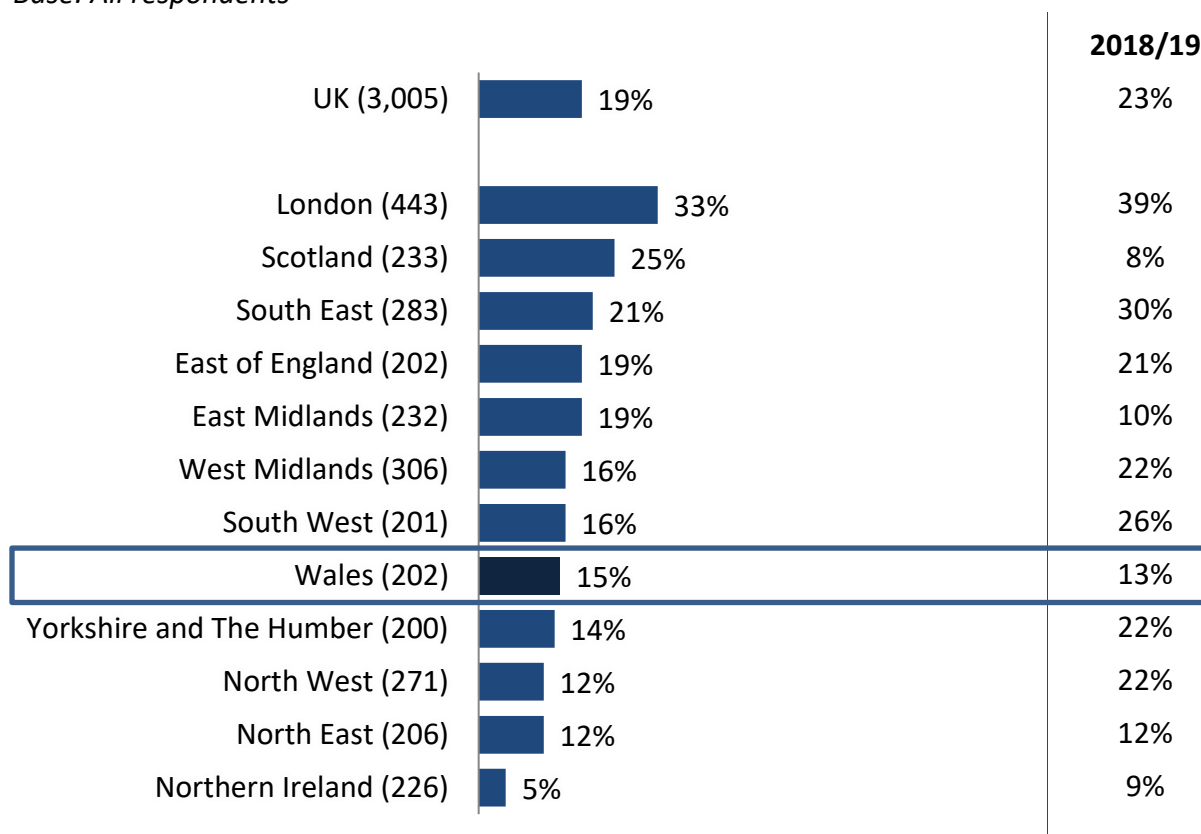
Q21. Unweighted bases in parentheses

Hours worked

Construction workers in Wales, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (62%, compared to a UK average of 59%), while 15% work more than 50 hours a week, much in line with 2018/19 (13%), but lower than the UK average of 19%.

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

Base: All respondents



Q22. Unweighted bases in parentheses

Work histories

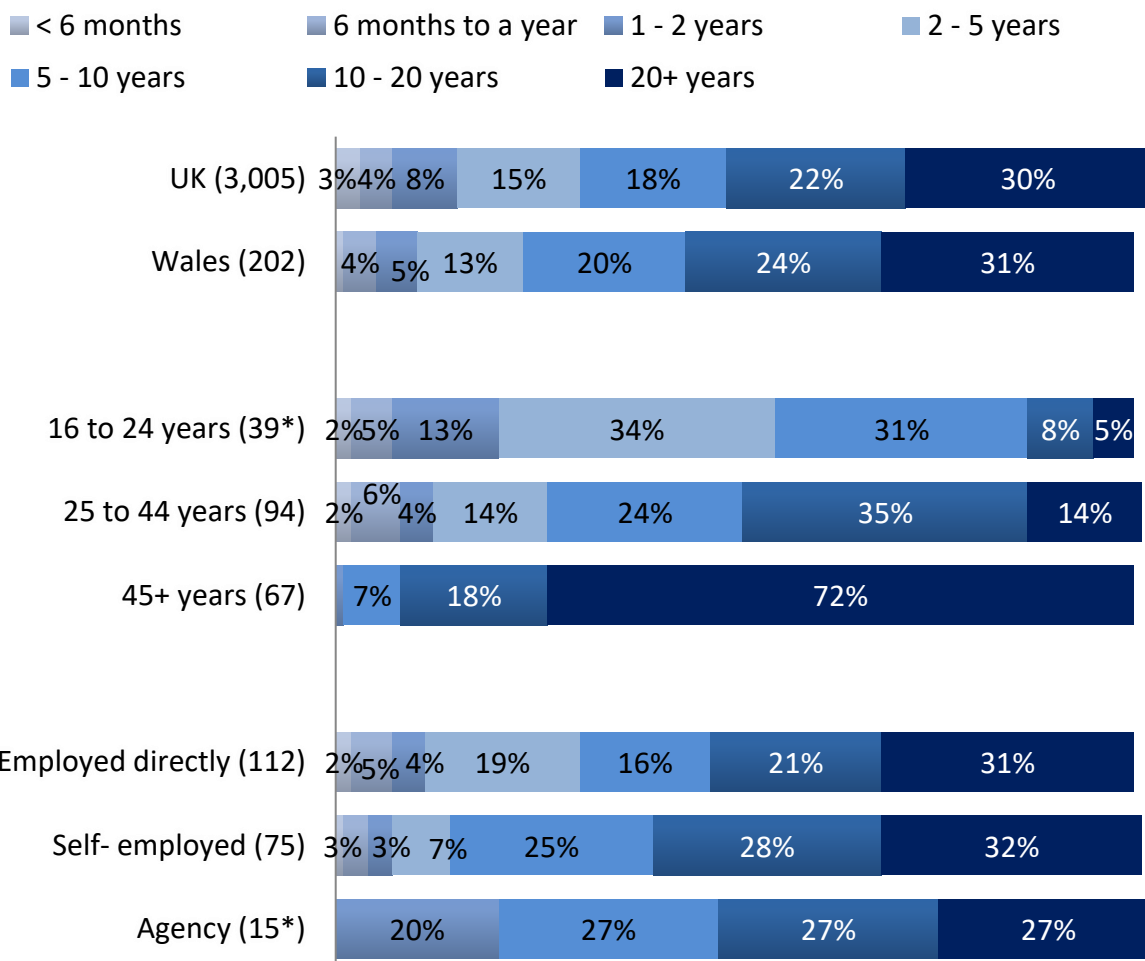
Time in the sector

Three in ten (31%) of all construction workers in Wales have worked in the construction industry for over 20 years, lower than 2018/19 (39%), but in line with the UK average (30%). Over half (55%) have worked in the industry for at least 10 years, in line with 2018/19 (58%), and with the UK average (52%).

As would be expected, the length of experience in the industry increases with age, with more than seven in ten (72%) of all construction workers aged 45 and over having more than 20 years' experience of working in the sector, although this is fewer than in 2018/19 (89%).

Figure 13: Years spent working in the construction sector

Base: All respondents



Q1. Unweighted bases in parentheses

* Caution: low base

Pre-construction employment histories

At 55%, the proportion of construction workers in Wales who have worked pretty much continuously in the industry is lower than in 2018/19 (59%), and the UK average of 61%.

The overall proportion who has only ever worked in construction has remained fairly consistent (67% in 2022 compared to 70% in 2018/19), and is in line with the UK average (71%).

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

All respondents

	Wales 2022 %	Wales 2018/19 %	Wales 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)	55	59	53	61	33	67	56	54
I have only worked in construction jobs but have had spells of being out of work	9	6	6	6	11	10	10	7
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	9	6	14	8	0	3	7	16
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	22	19	21	18	33	17	23	18
This is my first job. I haven't worked in any other industry.	2	6	4	4	22	1	1	3
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	2	5	1	4	0	3	2	1
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>3,005</i>	<i>9*</i>	<i>30*</i>	<i>94</i>	<i>67</i>

Q2

* Caution: low base

Overall, more than one in five (22%) construction workers in Wales 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, up on 2018/19 (19%), but in line with the 2022 UK average (22%).

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.

The most common sectors in which construction workers had started their careers were wholesale and retail trade; repair of motor vehicles and motorcycles (23%), accommodation (10%) and manufacturing (10%). Compared with 2018/19, there has been a decrease in workers transferring from manufacturing to construction (35% in 2018/19), and this is evident across the UK (20% in 2022, compared to 45% in 2018/19).

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

	Wales 2022 %	Wales 2018/19 %	UK 2022 %
G – Wholesale and retail trade; repair of motor vehicles and motorcycles	23	37	22
I – Accommodation	10	0	10
C – Manufacturing	10	35	20
N – Administrative and support service activities	8	0	5
R – Arts, entertainment and recreation	6	0	3
O – Public administration and defence; compulsory social security	6	4	5
<i>Unweighted bases</i>	<i>48</i>	<i>84</i>	<i>624</i>

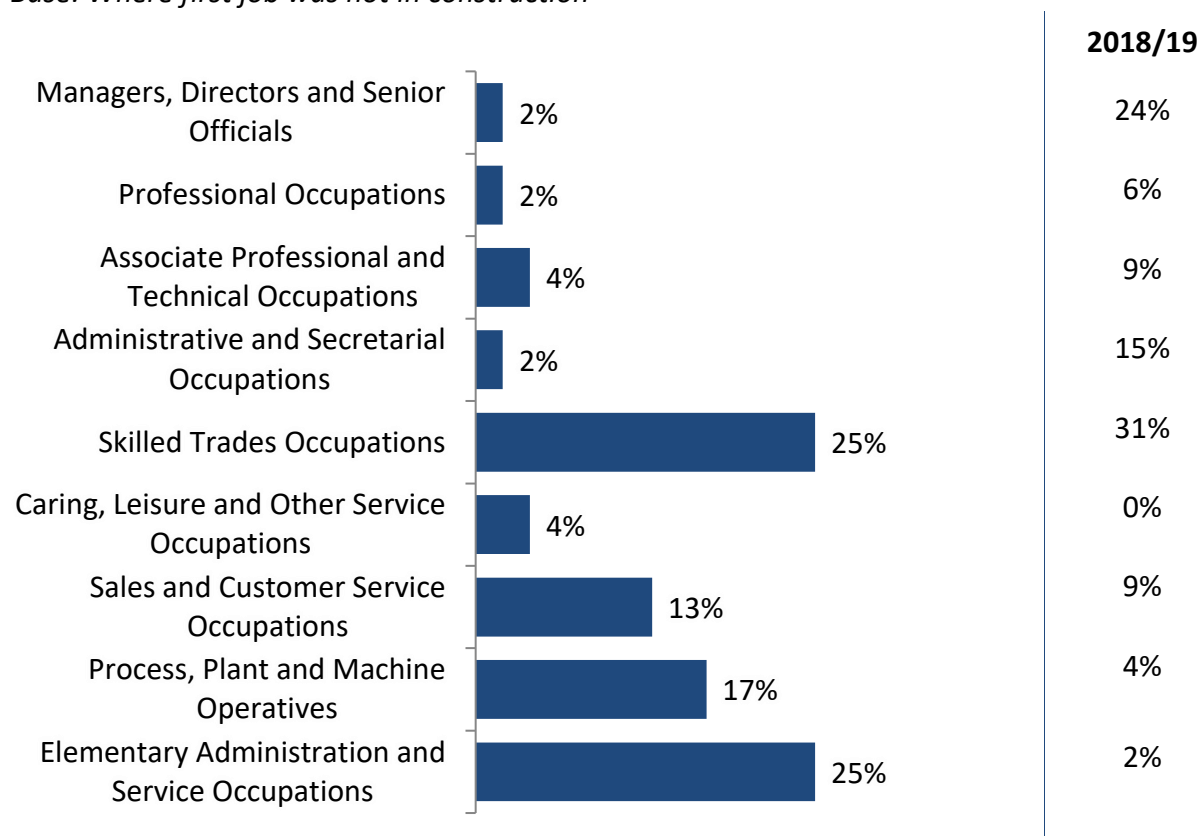
Q3

In terms of the job roles that respondents have held in other sectors, the most common include skilled trades occupations (25%), elementary administration and service occupations (25%), process, plant and machine operatives (17%) and sales and customer service occupations (13%).

There has been a significant increase in elementary administration and service roles since 2018/19 (2% then).

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 (48)

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 (40%) of all construction workers in Wales have worked in more than one construction trade or occupation whilst working in the construction industry, significantly higher than 2018/19 (29%), and lower than the 2022 UK average (35%).

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

Amongst the 40% of all construction workers in Wales that had worked in at least one other role/occupation, 21% had worked in 1 previous role, 41% had worked in 2 previous roles, 28% had worked in 3 roles/occupations and 11% had worked in 4 roles/occupations.

Workers are most likely to have previously worked as a labourer/general operative (41%) or as a bricklayer (14%). This is largely in line with the UK average.

Figure 17: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	Wales 2022 %	UK 2022 %
Labourer/General operative	41	39
Bricklayer	14	12
Plant/machine operative (e.g. Fork lift/JCB)	11	10
Carpenter/joiner	11	15
Banksman/Banksperson	11	7
Dryliner	9	5
Site manager	6	4
Roofer	5	4
Floorer	5	4
Painter/decorator	4	4
Mechanical fitter	4	2
Plasterer	3	5
Ceiling fixer	3	3
Technical	3	2
<i>Unweighted base</i>	<i>80</i>	<i>1,082</i>

Q7

Future career plans

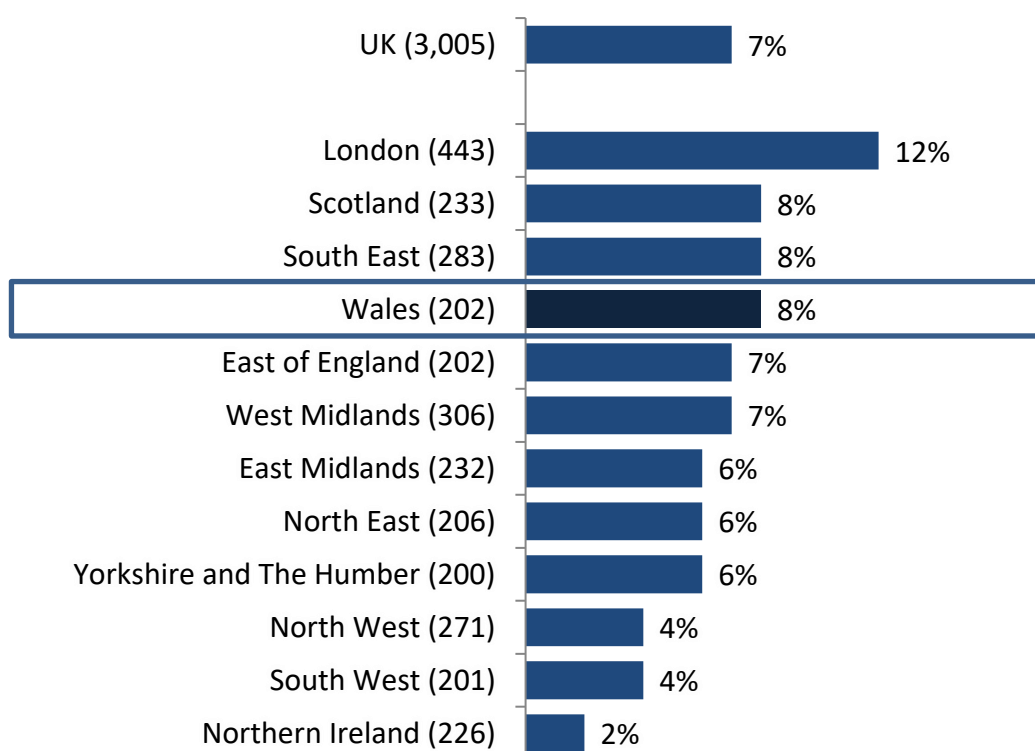
Approaching four in five (78%) construction workers in Wales would like to carry on in the same trade or occupation, in line with 2018/19 (80%) and the 2022 UK average of 80%.

Close to one in ten (8%) would like to change their trade/occupation, again in line with 2018/19 and the UK average (both 7%). The remainder would like to leave construction (4%) or were unsure (10%).

Those in temporary positions are more likely than average to want to change trade (15%).

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

The majority (95%) of construction workers in Wales report holding a skill card or certificate (e.g. CSCS or CSR). Wales is one of only two regions/nations that has seen an increase in this respect since 2018/19 (92%), the other being the North East, with most others seeing a significant decline.

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

Base: All respondents

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

Q12

In terms of the type of skill card or certificate held by construction workers in Wales, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (82%), in line with 2018/19 (83%) and 2015 (83%).

Close to a quarter (23%) hold the CPCS (Construction Plant Competence Scheme), an uplift on 2018/19 (14%), and higher than the UK average (14%).

Those employed directly are more likely than average to hold CSCS (88%), as are permanent staff (87%).

Figure 20: Type of skill card/certificate held

Base: All respondents

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %
CSCS (Construction Skills Certification Scheme) (GB)	82	83	83
CSR (Construction Skills Register) (NI)	3	1	1
CISRS (Construction Industry Scaffolders Record Scheme)	3	1	2
CPCS (Construction Plant Competence Scheme)	23	14	18
Other	5	4	3
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>

Q12

Workers who hold a CSCS card were asked what colour their cards are.

Overall, 4% of CSCS card holders have Red cards, three in ten (30%) have Green cards, and over a third (36%) have Blue cards. Over one in ten (13%) have Gold cards and 8% have Black cards, with other types of card held by less than 5%.

Figure 21: Colour of CSCS card held

Base: Where CSCS card is held

	Wales 2022 %	Wales 2018/19 %
Red – Trainee	2	4
Red – Experienced worker card	2	1
Green – construction site operative card for general site workers	30	32
Blue – skilled	36	27
Gold – Advanced craft/skilled worker	8	19
Gold – supervisor card	5	5
Black – contracts manager card	8	5
Academically Qualified Persons Card	4	0
Professionally Qualified Persons Card	1	0
Provisional Card	1	0
Construction Site Visitor Card	0	0
Apprentice Card	0	0
Other	1	2
Unsure	1	3
<i>Unweighted bases</i>	<i>165</i>	<i>237</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.

Overall, around a third (35%) of construction workers in Wales report having no construction-related qualifications when they started their first job. This is significantly lower than the 70% who reported this in 2018/19, and the 76% who did so in 2015, and is significantly lower than the UK average of 47%.

Those employed directly are more likely than average to report having no qualifications (43%), and those who are self-employed are less likely than average to do so (21%).

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, two thirds (65%) of construction workers in Wales report holding a construction-related qualification, in line with the 69% who did so in 2018/19, and the UK average. There are no significant differences by key sub-groups.

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

Base: All respondents

		Wales 2022 %	Wales2018/19 %	Wales 2015 %	Wales 2012 %	UK 2022 %
Total (202)		65	69	58	70	69
Age	16 to 19 years (9*)	67	41	73	44	54
	20 to 24 years (30*)	70	64	63	70	64
	25 to 44 years (94)	68	72	62	73	67
	45+ years (67)	58	72	45	68	78
Length of time in construction	<1 year (11*)	55	32	55	22	46
	1 to 2 years (10*)	60	45	90	40	45
	2 to 5 years (26*)	62	62	47	72	62
	5+ years (153)	67	75	60	74	75
Current contract type	Employed directly (112)	63	66	55	68	69
	Self- employed (75)	73	79	63	73	74
	Agency (15*)	40	33	79	0	50
<i>Unweighted bases for 2022 in parentheses</i>						

Q15/Q16

* Caution: low base

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 Wales are NVQ/SVQ qualifications (66%), in line with the UK average (69%), and 2018/19 (65%).

Close to one in five (18%) hold an apprenticeship, a significant uplift on the 4% who did so in 2018/19, 15% hold City & Guilds qualifications, and 10% hold a degree.

Around one in twenty hold HNC/HND/BTEC Higher (7%) or the Construction Award (5%).

Figure 23: Main type of qualification held

Base: Workers with qualifications (valid responses)

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	Wales 2012 %	UK 2022 %
NVQ/SVQ	66	65	63	67	69
Apprenticeship	18	4	2	0	11
City & Guilds	15	20	21	23	18
Degree	10	7	7	<0.5	5
HNC/HND/BTEC Higher	7	6	6	1	5
Construction Award	5	Na	Na	Na	3
Other	14	15	9	5	12
<i>Unweighted bases</i>	<i>131</i>	<i>158</i>	<i>131</i>	<i>226</i>	<i>2,093</i>

Q15/Q16

Additional formal training

Self-assessment of basic skills needs

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

Overall, a quarter (24%) of construction workers in Wales believe they would benefit from some form of training in basic skills, up on 2018/19 (10%) and higher than the UK average of 19%, which has also seen an increase since 2018/19 (11%).

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

Base: All respondents

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	Wales 2012 %	UK 2022 %
ANY	24	10	18	15	19
Reading	10	3	8	6	9
Speaking English	9	1	3	3	9
Writing	6	4	6	4	7
Maths	10	8	13	10	6
Digital skills	8	Na	Na	Na	4
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>428</i>	<i>3,005</i>

Q37

Current study for additional construction qualifications

Overall, 17% of all construction workers in Wales are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications), which is higher than the UK average (13%), and somewhat higher than 2018/19 (11%).

The likelihood that workers are currently working towards qualifications is significantly lower amongst those who have been in the industry for five or more years (13%) and those who are self-employed (8%), and significantly higher among those employed directly (23%).

Figure 25: Proportion working towards additional construction qualifications

Base: All respondents

		Wales 2022 %	Wales 2018/19 %	Wales 2015 %	UK 2022 %
Total (202)		17	11	12	13
Age	16 to 19 years (9*)	56	53	60	43
	20 to 24 years (30*)	33	14	23	24
	25 to 44 years (94)	11	11	11	11
	45+ years (67)	13	2	2	5
Length of time in construction	<1 year (11*)	27	32	30	28
	1 to 2 years (10*)	30	0	50	27
	2 to 5 years (26*)	31	24	20	20
	5+ years (153)	13	7	6	8
Contract type	Employed directly (112)	23	15	15	15
	Self-employed (75)	8	5	8	10
	Agency (15*)	20	8	6	8
Highest qualification level	None (48*)	19	10	11	11
	Level 1 (23*)	26	44	38	17
	Level 2 (52)	19	13	20	12
	Level 3 (29*)	14	6	7	11
	Level 4+ (27*)	15	0	5	16
<i>Unweighted bases for 2022 in parentheses</i>					

Q18

* Caution: low base

Of the 35 construction workers in Wales¹ who are currently studying for a qualification (and who provided a response) half (54%) are studying for an NVQ/SVQ, 17% for an apprenticeship and 6% for a degree or a Construction Award.

¹ Number of workers (unweighted)

Supervisory and managerial qualifications and training

As reported earlier, a third (31%) of construction workers in Wales 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, 22% want to become a supervisor or manager in the future, somewhat more than the 14% who did so in 2018/19, and one in twenty (6%) previously held the role and want to return to that status (in line with 5% in 2018/19). Over half (53%) are certain that they do not want to, in line with the UK average of 59%, and close to one in five (19%) are unsure.

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 Wales (126)		22	6	53	19
Age	16 to 19 years (7*)	29	0	43	29
	20 to 24 years (24*)	38	4	29	29
	25 to 44 years (60)	23	3	52	22
	45+ years (34*)	6	12	76	6
Length of time in construction	<1 year (9*)	33	0	33	33
	1 to 2 years (9*)	22	0	33	44
	2 to 5 years (22*)	45	0	36	18
	5+ years (84)	15	8	61	15
Contract type	Employed directly (58)	29	2	47	22
	Self-employed (53)	15	9	57	19
	Agency (15*)	20	7	67	7
<i>Unweighted bases in parentheses</i>					

Q9

* Caution: low base

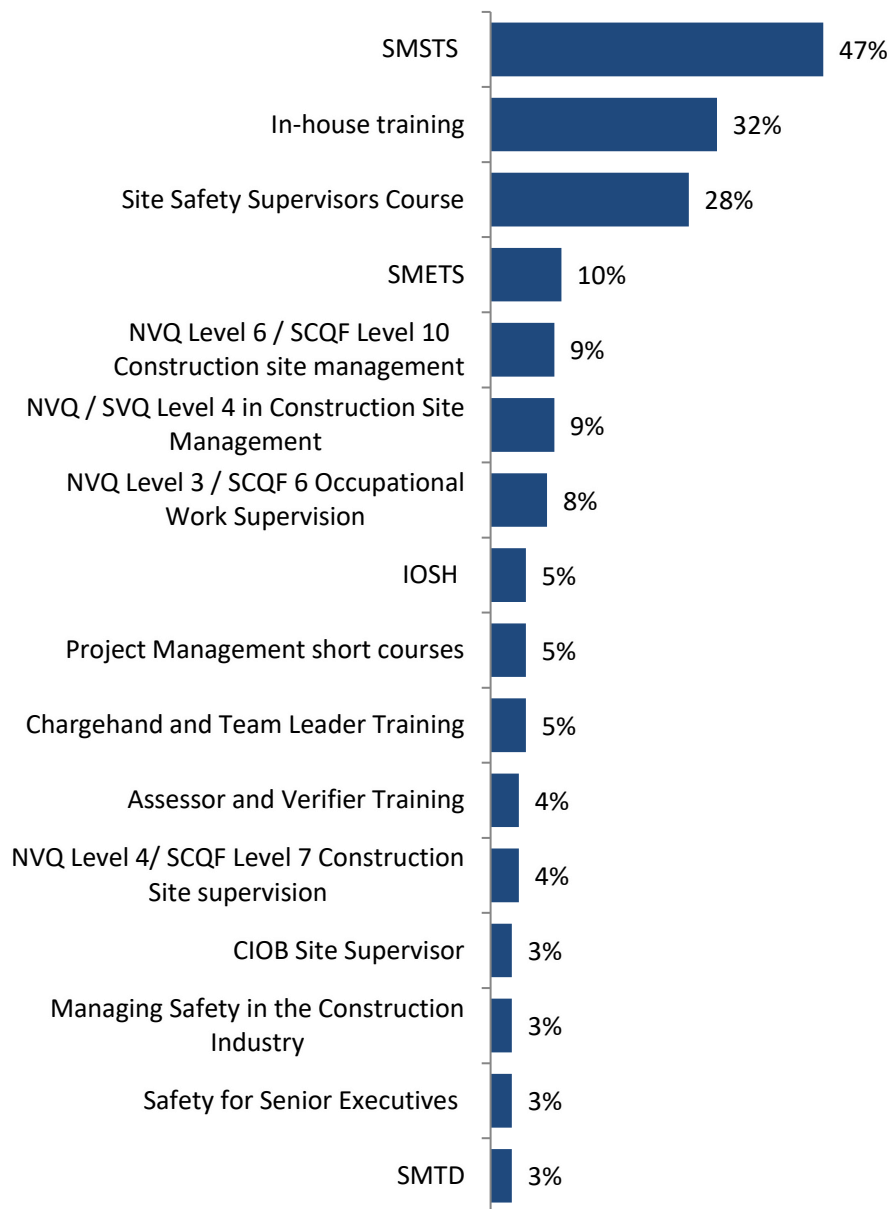
Around two in five (39%) of all construction workers in Wales have received formal training designed to improve managerial or supervisory knowledge or skills, an increase on the 25% who had in 2018/19, and higher than the UK average of 33%. Among those who have or have had some form of supervisory or management responsibilities, over four in five (84%) have received formal training, again an increase on 2018/19 (77%), and higher than the UK average (80%).

In terms of the types of supervisory/managerial training undertaken, SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned by those who have undertaken any training (47%), followed by in-house training (32%) and Site Safety Supervisors Courses

(28%). 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 = 79

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 Wales 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.

The proportion of construction workers in Wales who hold a skill card/certificate, but has no other construction qualification remains at around one in five (20% compared to 24% in 2018/19), and is in line with the UK average (19%).

At 17%, the proportion of construction workers who are working towards a construction qualification is somewhat higher than 2018/19 (11%) and 2015 (12%), and the 2022 UK average (13%).

Figure 28: Qualification status summary

Base: All respondents

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	Wales 2012 %	UK 2022 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	97	95	96	95	96
Holds a formal construction qualification or a skills card/certificate	97	95	96	95	96
Holds a skills card/certificate	95	92	92	92	93
Holds a skills card/certification but no other qualification	20	24	32	42	19
Working towards a qualification	17	11	12	13	13
<i>Unweighted bases</i>	<i>202</i>	<i>411</i>	<i>290</i>	<i>428</i>	<i>3,005</i>

Q12/Q15/Q16/Q18

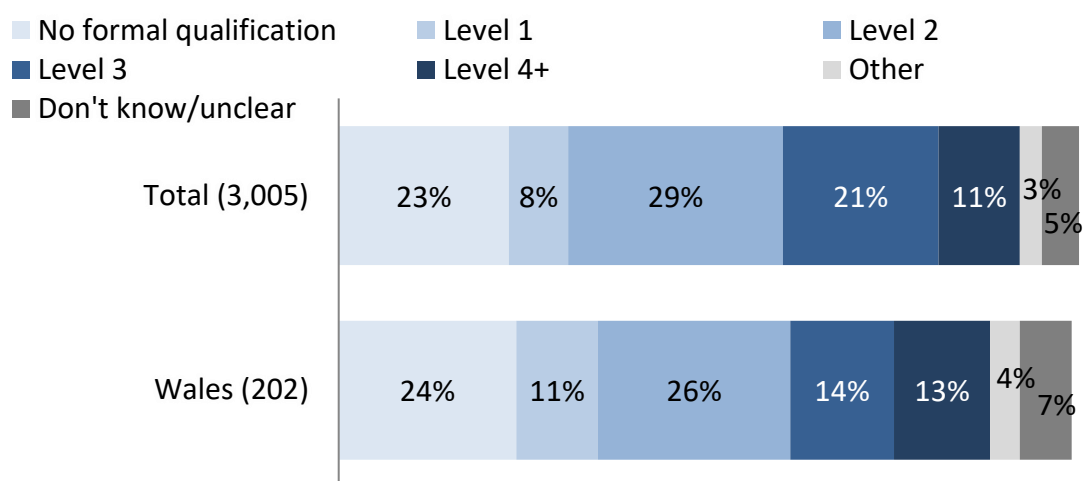
Based on all questions relating to qualifications it is possible to calculate each worker’s highest qualification level, and Figure 29 summarises construction workers’ highest level of qualification, overall and by occupation.

The proportion of construction workers in Wales with no formal qualification has reduced from 43% in 2018/19 to 24% in the latest survey.

Overall, 53% of construction workers in Wales have qualifications equivalent to Level 2 or above, as in 2018/19 and 2015, but this is lower than the 2022 UK average (61%). More than a quarter (28%) have qualifications equivalent to Level 3 or above, similarly to 2018/19 (27%), but, again, this is lower than the UK average (32%).

Figure 29: Current qualification level, by occupation

Base: All respondents



Q15/Q16. Unweighted bases in parentheses

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. Over half (55%) report that it was because their employer sent them there, up on the 40% who did so in 2018/19, and higher than the UK average of 47%.

There has been a corresponding decline in the proportion who report that they grew up there, from 57% in 2018/19 to 38% in the latest survey, placing Wales below the UK average (46%) in this respect.

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

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	UK 2022 %
Employer sent you here	55	40	29	47
You grew up here/have always lived here	38	57	63	46
Family reasons	5	6	7	5
Came to the area to take up this or another job	4	1	2	5
Construction work is better paid in this area	4	<0.5	1	4
There are more jobs available in this area	1	<0.5	2	3
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>3,005</i>

Q28

Around three in five (61%) construction workers in Wales have worked within their current region for their whole career, maintaining the increase seen on 2018/19 (60%), and placing Wales above the UK average in this respect (49%).

A further quarter (27%) have worked in their current region for most of their career, meaning that 88% have remained in Wales for all or most of their career, in line with 2018/19 (89%) but higher than the UK average (83%).

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

Base: All respondents

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	Wales 2012 %	UK 2022 %
All of your time	61	60	51	40	49
Most of it	27	29	34	37	34
Around half your time	4	6	7	10	8
A small proportion of your time	2	3	6	11	5
Only on this job (this is the first site you've been to in this region/nation)	<0.5	1	1	2	1
Don't know	5	1	1	<0.5	3
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>428</i>	<i>3,005</i>

Q26/Q27

In Wales, two thirds of construction workers (66%) indicate their employer operates nationwide, lower than the UK average of 73%, and most of the remainder report that their employer operates in Wales only (32%).

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.

Over four in five (84%) of construction workers in Wales were in the same region as their previous job, lower than in 2018/19 (88%), but amongst the highest of any region/nation in 2022.

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
East of England (WM)	13	1	0	10	5	0	0	5	1	3	66	3
Yorkshire & Humber (YH)	15	1	0	10	2	*	0	*	1	0	2	72
Northern Ireland (NI)	1	0	0	0	0	85	0	0	0	0	0	0
Scotland (SC)	1	0	*	0	0	1	98	0	0	0	1	0
Wales (WA)	0	1	0	0	*	0	0	*	3	84	1	1
Republic of Ireland	0	0	*	0	0	13	0	0	0	0	*	0
Other parts of Europe	0	0	1	0	1	0	*	*	0	0	0	0
Outside of Europe	0	0	1	0	0	0	0	*	1	0	0	0
Other / Unsure	1	0	3	0	*	0	0	1	5	1	2	1
<i>Unweighted Bases</i>	216	183	392	195	252	226	226	264	183	193	290	184

Q32

Worker origins

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

Nine in ten (90%) of construction workers in Wales were interviewed in the same region/nation in which they were living when they started their construction career. This is lower than in 2018/19 (93%), but amongst the highest of any region/nation in 2022.

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
East of England (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

At 93%, the proportion of construction workers in Wales who were interviewed on a site that was located within the same region/nation as their permanent home is lower than in 2018/19 (98%) but in line with 2015 (93%). It is higher than the UK average in 2022 (85%).

Of the 7% who travel outside of their region to their current site, almost all (4%) are from the South West.

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 quarter (26%) of construction workers in Wales have worked no more than 20 miles away, slightly lower than in 2018/19 (29%), but lower than the UK average of 33%.

A further almost two in five (38%) have worked between 21 and 50 miles away, slightly higher than in 2018/19 (35%) and compared to the UK average of 34%.

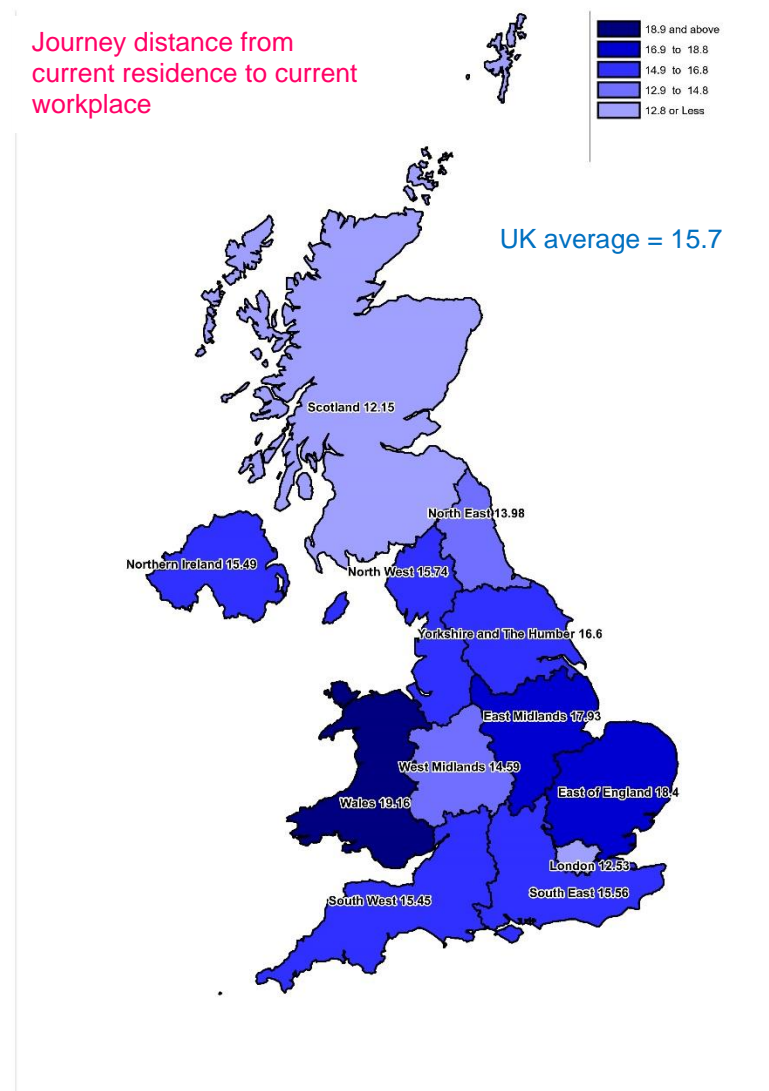
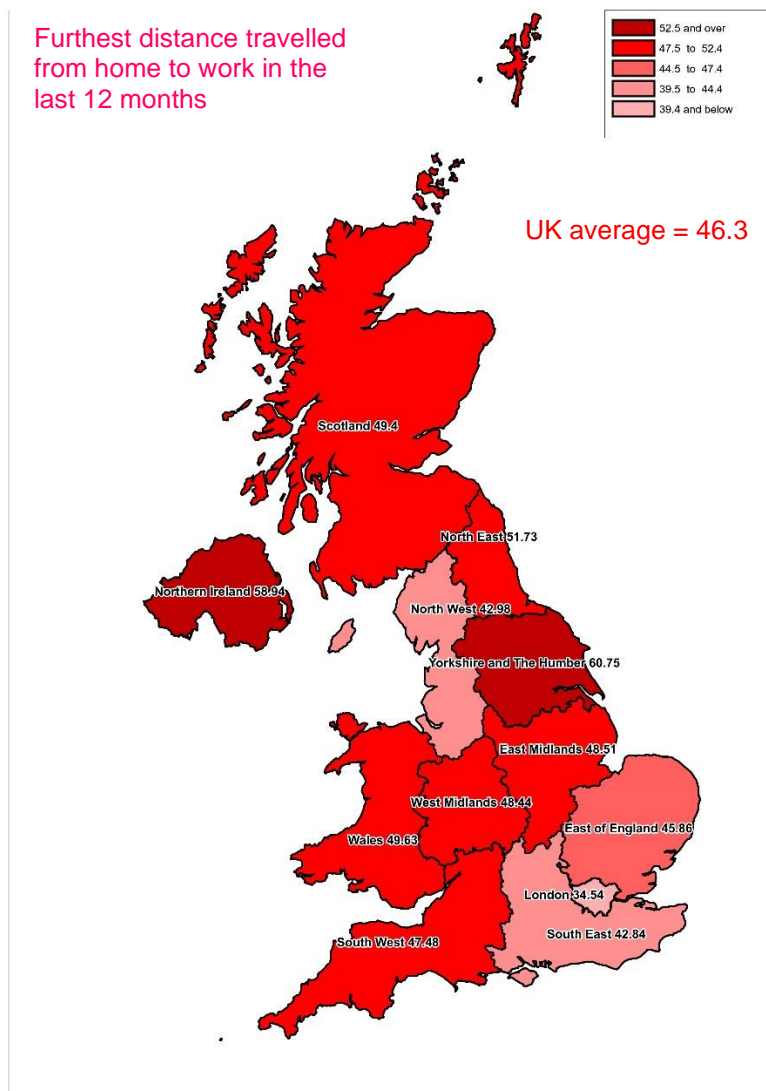
This leaves close to two in five (37%) who have worked more than 50 miles away from their permanent or current home, including 12% who have worked more than 100 miles away. This compares to 32% and 11% respectively in 2018/19.

The average furthest distance travelled is 50 miles in Wales, slightly further than 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 20 miles, somewhat higher than that reported in 2018/19 and 2015 (both 16 miles), and the national average of 16 miles.

A third (34%) of those providing a response travel less than 10 miles to work, slightly lower than the 38% who did so in 2018/19, and a further third (32%) travel between 10 and 19 miles, compared to the UK averages of 45% and 28% respectively.



Use of temporary accommodation

In Wales, one in twenty (6%) construction workers report that they are currently staying in temporary accommodation while working at their site, slightly higher than in 2018/19 (3%) but similar to the 2022 UK average (5%).

Expected site/phase duration

All the workers in Wales who are currently employed on a temporary basis (30% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 12% who expect to work for another week or two, 6% expecting another two to four weeks, just over a fifth (22%) for one to six months, a quarter (25%) for six to twelve months, and around one in ten (8%) for more than a year.

More than a quarter (27%) do not know how much longer they expect to be working, significantly lower than 2018/19 (49%), and also lower than the 2022 UK average (32%).

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

Overall, 16% of construction workers in Wales do not expect to work on that site for more than a month, lower than 2018/19 (24%), but higher than the 2022 UK average (12%).

Over half (53%) anticipate being on site for more than a month but less than a year, somewhat higher than the 41% who did so in 2018/19, but in line with the UK average of 52%.

Both nationally and in Wales, over one in ten (13% and 16% respectively) expect to be on site for more than a year, which is significantly up on 2018/19 (7%) but significantly down on 2015 (38%) and 2012 (26%).

Overall, 14% are uncertain in this regard, lower than 2018/19 (28%) and the 2022 UK average of 22%.

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

	Wales 2022 %	Wales 2018/19 %	UK 2022 %
Less than a week	6	6	2
1-2 weeks	4	8	3
2-3 weeks	2	5	3
3-4 weeks	4	5	4
1-3 months	12	10	11
3-6 months	11	11	17
6-12 months	30	20	25
More than a year	16	7	13
Don't know	14	28	22
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>3,005</i>

Q24

Expected next site location

While the majority (70%) of all construction workers in Wales 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 is a lower proportion than in 2018/19 (77%) and more in line with 2015 (71%). It is in line with the UK average of 69%.

The proportion who are sure that this will not be the case has increased, although remaining a small minority (6% compared to 2% in 2018/19), while the proportion who say it depends where the work is has remained stable (15%, compared to 13% in 2018/19). 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 seven 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 (68%), but to a significantly lesser extent than was the case in 2018/19 (82%) and compared to a higher UK average (78%).

Around a third have undertaken private industrial work (35%) and public non-housing work (34%). While each of these are in line with the UK average (35% and 32% respectively), in Wales, public non-housing work has seen a significant decline since 2018/19 (60%).

Around three in ten have undertaken commercial work (30%) and housing repair and maintenance (28%), and in both instances this represents a decline on 2018/19 (40% and 42% respectively), placing Wales below the UK average (39% and 42% respectively).

A quarter (25%) have undertaken infrastructure building projects, in line with 2018/19 (26%) and the UK average (23%).

In terms of the number of types of work undertaken, construction workers in Wales are more likely than average to have only worked on one type of project (50% compared to 42%), and this is significantly higher than 2018/19 (29%).

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

	Wales 2022 %	Wales 2018/19 %	Wales 2015 %	Wales 2012 %	UK 2022 %
New housing	68	82	86	81	78
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	35	31	21	36	35
Public non-housing work such as schools, sports facilities, landscaping	34	60	18	50	32
Commercial work such as shops, office, pubs etc	30	40	21	45	39
Housing repair and maintenance including extensions/loft conversions	28	42	22	46	42
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	25	26	18	21	23
Off-site manufacturing	4	Na	Na	Na	6
ONE TYPE ONLY	50	29	63	11	42
TWO TYPES	17	20	12	35	17
THREE TYPES	10	15	8	19	13
FOUR TYPES	8	15	4	11	9
FIVE TYPES	9	10	5	10	9
SIX TYPES	4	10	6	14	6
<i>Unweighted bases</i>	<i>202</i>	<i>287</i>	<i>290</i>	<i>428</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.

In line with the UK average of 86%, over four in five (82%) construction workers in Wales think it is likely that they will still want to do so, including 39% who say they definitely will be (a decrease on the 51% who thought this in 2018/19), and 29% who think it is very likely.

Fewer than one in ten (7%) say they definitely will not, or it is unlikely that they will, still want to work in construction in five years' time (in line with the UK average of 7%).

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	39	44	43	39	34
Very likely	29	22	17	33	30
Quite likely	14	22	23	14	10
Quite unlikely	4	11	3	4	4
Very unlikely	2	0	0	3	1
Definitely will not be	1	0	0	0	3
Hope to be retired	3	0	3	1	7
Don't know	7	0	10	5	9
<i>Unweighted bases</i>	<i>202</i>	<i>9*</i>	<i>30*</i>	<i>94</i>	<i>67</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), 39% believe they will definitely want to be working in the construction sector, 30% believe it is very likely they will want to be working in the construction sector, and 15% believe it is quite likely they will want to be working in the construction sector.

Overall, 84% of this group are likely to some degree to want to be working in the sector, in line with the 84% who did so in 2018/19. Fewer than one in ten (7%) of this age group think it unlikely they will want to be working in the construction sector in five years (compared with 7% in 2018/19).

The Wales 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 Wales

However, a substantial proportion of industry workers, as surveyed here, have been in the industry for lengthy periods. Across the UK around 70% of workers have worked in the industry for 5 years or more (75% within Wales), and this reflects findings from previous surveys. Demographic and other characteristics of the workforce therefore change little overall, and with only 7% of workers (both in Wales and 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. For example, a doubling of the percentage of female 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, plant operators, bricklayers and site managers remaining most frequent followed by much lower levels of representation of other industry trades.

Where survey respondents reported that they had changed roles within the industry, the distribution of prior occupations broadly reflects the current distribution of occupations in the workforce as a whole. Aspirations to a different future occupation are infrequent, as only 7% of workers (8% in Wales) 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, and to those seen in Wales in the latest survey, with the exception that construction workers in Wales are more likely to be working towards a qualification (17%).

In Wales, there appears to be a greater appetite for taking on more responsibility, with more respondents certain that they want to become a supervisor or manager in the future than previously (28% compared to 19% in 2018/19). This is in contrast to the UK-wide picture, where there appears to be greater reticence in taking on more responsibility this year than previously, (23% compared with 30% in 2018/19).

Reflecting this, while across the UK, fewer workers than in 2018/19 have had formal training in managerial or supervisory knowledge or skills (28%, compared with 35%), in Wales this proportion has increased from 25% to 39%.

Wales is also one of only two regions/nations that has seen an increase in the proportion of construction workers holding Skills Cards (from 92% to 95%), the other being the North East.

Overall, a higher proportion of construction workers in Wales in 2022 than in 2018/19 held construction-related qualifications prior to starting their first job in construction, with a third (35%) of construction workers in Wales reporting having no construction-related qualifications when they started their first job, compared with 70% in 2018/19, and 76% in 2015. This is also a significantly lower than the UK average of 47%.

At the time of interviewing, two thirds of construction workers in Wales reported holding a construction-related qualification (65%), which is in line with 2018/19 and the UK average (both 69%).

As in 2018/19, more than a third (37%) of construction workers in Wales are self-employed. Contrary to what has been seen in other regions, this has not increased over the last 2 to 3 years, but having more than one in three workers in self-employment, while likely to positively impact both employers - enabling increased flexibility and cost control – and workers - increased independence, may also have a negative impact, with greater uncertainty and insecurity in the industry for workers. Potentially, no change in this may result in lower than ideal levels of employer-led training and attention to improving the skills of the workforce.

While the proportion of workers in Wales who are working towards a qualification has increased, from 11% in 2018/19 to 17% in the latest survey, placing Wales above the average (13%) in this respect, this proportion has perhaps not increased as much as we would like to see it increase, and across the UK has actually reduced. In Wales too, it should

be considered in the context of very few gaining construction-related qualifications during their careers to date.

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 with 41% in 2018/19), construction workers in Wales tend to travel further than average (37% having worked more than 50 miles from home). In terms of current journeys to work from homes or temporary bases, construction workers in Wales have travel an average of 19 miles, compared to a UK average of 16 miles. In 2018/19, the distance travelled in Wales was lower at 16 miles.

Focus on how Wales differs from the UK average

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

- More construction workers in Wales than average across the UK originate from the UK (94%, compared with 83%)
- Nine in ten (90%) construction workers in Wales have lived in the UK all their lives, higher than the UK average of 80%
- Wales has a higher proportion of construction workers with a long-term illness, health problem, or disability which limits the type of work they can do (7% compared to 3%)
- Over half (55%) of construction workers in Wales are employed directly, higher than the UK average of 48%
- Overall, a quarter (24%) of construction workers in Wales believe they would benefit from some form of training in basic skills, up on 2018/19 (10%) and higher than the UK average of 19%, which has also seen an increase since 2018/19 (11%)
- Three in five (61%) construction workers in Wales have worked within their current region for their whole career, placing Wales above the UK average in this respect (49%)
- Furthermore, nine in ten (90%) construction workers in Wales were interviewed in the same region/nation in which they were living when they started their construction career. This is amongst the highest of any region/nation
- Although new housing continues to be the most common type of construction work undertaken (68%), there has been a decline in this since 2018/19 (82%) and it is not as significant as across the UK (78%)

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