

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

UK-wide Report - April 2019





Study prepared by BMG Research from a commission by CITB.

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Executive summary

Introduction

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

Profile of the sample

- All but 2% of construction workers are male. Around half of construction workers interviewed in the survey are aged 34 and under (45%), which is a higher proportion than compared with the UK population as a whole (36%). Just 4% of construction workers are aged 60 or over.
- Overall 6% of the workforce is of BME ethnic origin, compared with a higher incidence of 15% in the UK population as a whole. By region/nation London has the highest proportion of BME workers (15%).
- One in six construction workers (17%) originate from another country and this proportion increases to 1 in 2 (51%) in London.
- While 80% of construction workers have lived in the UK all of their lives, the majority of the remainder (a further 14%) have lived in the UK for more than 5 years.
- By trade/occupation, the highest proportion of the sample is accounted for by labourers/general operatives (16%), followed by bricklayers (11%) and then carpenters/joiners and site managers (both 10%). Compared with 2015 the proportion of bricklayers has declined (from 15% to 11%), and there are slightly more site managers (10% compared with 8%).
- Three in ten of those interviewed perform a supervisory or management role on their site (30% cf. 25% in 2015 and 17% in 2012).
- Around half of construction workers interviewed for the survey are employed directly by a company (49%), which is a lower proportion than reported in 2015 (54%). The proportion of self-employed workers has increased since 2015 (from 39% to 43%), while the proportion of workers working for an agency has remained stable (7% cf. 6% in 2015). BME workers are significantly more likely than workers of a white ethnic origin to work for an employment agency (14% cf. 7%). By region/nation the proportion of workers employed directly varies from 75% in Scotland, down to just 36% in the West Midlands.
- Just over a quarter of all construction workers (28%) are employed on a temporary, rather than permanent basis. By region/nation the proportion of construction workers working on a temporary basis is highest in the South West (43%) and the East of England (38%). By occupation, the proportion is highest amongst dryliners (39%), bricklayers (34%), plant/machine operatives (34%) and labourers/general operatives (33%).



- Sixty per cent of construction workers work between 40 and 49 hours per week, while nearly a quarter work more than 50 hours per week (23%). In London the proportion that work 50+ hours per week increases to around two-fifths (39%).

Work history

Time in the sector

- A third of all construction workers have worked in the industry for at least 20 years (32%) and a total of more than half have done so for 10+ years (58%).
- Two-thirds of construction workers have worked solely within the construction industry (67%), including over half who have done so pretty much continuously, without spells out of work (56%).

Previous non-construction jobs

- Amongst the just over 1 in 5 construction workers that worked in another sector *before* starting work in construction (23% of all), the sectors worked in beforehand are most likely to be either manufacturing (45%) or the wholesale and retail sector (19%).
- There are significant differences by region/nation, with those having worked in other industries particularly likely to have worked in manufacturing within the West Midlands (67%) and the North West (61%), while around two-fifths of construction workers who have worked in other industries within Scotland and Wales have worked in wholesale/retail (41% and 37% respectively). Agriculture/forestry/fishing is key as a sector in which construction workers previously worked in Northern Ireland (40%), the North East (26%) and South West (19%) and other primary industries (mining and quarrying) were cited by one in five construction workers with experience of other sectors in the North East (20%) and the East Midlands (19%).
- In terms of the job roles that construction workers previously held in other sectors, the highest proportion were in associate professional and technical (28%), and skilled trades (27%) occupations.

Occupational switching within the construction sector

- Just over a third of all construction workers have worked in more than one construction trade or occupation whilst working in the construction industry (36%). The proportion that has worked in more than one role is also significantly higher amongst those who currently work for an agency (51%) than among those who are employed directly or are self-employed (both 35%).
- Workers are most likely to have previously worked as a labourer/general operative (34%), while 1 in 5 workers have previously worked as a carpenter/joiner (19%) and 1 in 8 have worked as a bricklayer (12%).
- Thinking about their future plans in the construction sector, 8 in 10 workers would like to carry on in the same trade or occupation (80%), while 1 in 10 would like to change their trade/occupation (10%) and 1 in 20 would like to leave the construction altogether (5%).



- By region/nation, construction workers within the North West are most likely to want to change trade/occupation (16%), followed by workers in London and the East of England (15% and 13% respectively). By occupation those working as labourers/general operatives (20%) are most likely to want to change trade/occupation.
- The most popular occupation that workers would like to change to is site manager (39% of those who would like to change).
- In over four-fifths of cases where construction workers would like to change trade/occupation they believe they will require further training or qualifications in order to do so (87%). The main reason for wanting to change trade/occupation is the belief that workers will be better paid (69%), followed by workers wanting to make better use of their skills (41%) and move into a role they perceive to be more interesting (38%).

Qualifications and skills

Skills cards/certificates

- The vast majority of all construction workers hold some form of construction skill card or certificate (97%). Compared with the English regions, Scotland and Northern Ireland, the proportion is lower in Wales (92%). Younger workers (86% of 16-19 year olds) and those who have worked in construction for less than a year (89%) are less likely to hold a skill card/certificate, but there is little difference between workers across older age groups and with differing lengths of experience (of over a year) in the propensity to hold a skill card or certificate.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (85%) and in Northern Ireland most hold the CSR card/certificate (70% of those with a card/certificate).
- Card colours vary by age, region/nation and particularly by occupation; labourers/general operatives are most likely to hold Green cards (76%); roofers are most likely to hold Blue cards (88%); and electricians (37%), carpenters/joiners (26%) and bricklayers (23%) are most likely to hold Gold skill cards.

Construction-specific qualifications

- Nearly three quarters of all construction workers say they had no formal qualifications when they first started working in the construction industry (72% cf. 75% in 2015). By current trade/occupation, the proportion of workers that started their construction careers with no formal qualifications is highest amongst roofers (88%), plasterers (87%), scaffolders (84%), dryliners (83%) and labourers/general operatives (83%), whilst those in technical job roles (56%), site managers (60%), bricklayers (64%), carpenters/joiners (64%) and plumbers (64%) are least likely to have started with no formal qualifications.
- Compared with the 28% of workers that had qualifications when they first started working in construction, 72% of all construction workers now hold some sort of construction-related qualification at the time of interview.



- The proportion of workers that currently hold any qualifications is lower than average amongst those who have worked in construction for less than a year (34%) and between 1 and 2 years (52%) and workers employed by an agency (49%).
- By region/nation, the proportion of construction workers that hold qualifications varies from 78% in the North West, down to 55% in Northern Ireland. By trade/occupation, proportions vary from more than four-fifths amongst site managers, plumbers, carpenters/joiners and electricians, down to just less than two-fifths of labourers/general operatives.
- The qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (58% of those with qualifications cf. 66% in 2015). One in seven construction workers with qualifications hold City & Guilds qualifications (14%), whilst fewer construction workers with qualifications now hold an apprenticeship (6%).

Basic skill needs

- One in nine construction workers believe they would benefit from some form of training in basic skills (11%), compared with higher proportions of 1 in 7 in 2015 (14%) and 1 in 5 in 2012 (20%). Workers based in London (19%) and BME (19%) and migrant workers (41%) are more likely to believe this is the case.
- In terms of the type of training required, there is an almost even split across reading, writing, speaking English, and Maths.

Current study for qualifications

- One in seven construction workers are currently working towards any formal qualifications relevant to the construction industry (15% cf. 12% in 2015 and 11% in 2012). This proportion is significantly higher amongst 16 to 19 year olds (55%) and workers currently qualified to Level 1 (27%).
- Amongst workers with no qualifications, 1 in 6 are currently working towards a qualification (16%).
- By trade/occupation, those in technical roles (28%), site managers (27%) and electricians (27%) are most likely to be working towards a qualification, while labourers/general operatives (5%) and painter/decorators (5%) are least likely.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role, half are certain that they would not like to do so (51%), while 3 in 10 would like to do so (30%) and a fifth are unsure (20%).
- A third of all respondents (34%) and four-fifths of those who have had some form of supervisory or management responsibilities (81%) have received any formal training designed to improve managerial or supervisory knowledge or skills. Site Manager Safety Training Scheme (SMTS) (47%) is the type of training most likely to have been received, followed by a Site Safety Supervisors Course (34%) and in-house training (31%).



Overall skill levels

- The vast majority of construction workers (99%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. Just over a fifth of the workforce (22%) holds a skill card/certificate, but has no other construction qualification.
- Overall, three-fifths of those providing a response (allowing a level to be assigned) have qualifications equivalent to Level 2 or above (59% cf. 58% in 2015). More than a quarter of all construction workers (27%) hold qualifications equivalent to Level 3 or above. This proportion is higher than average amongst site managers (62%) and electricians (71%).

Geographic mobility

Work history in the region/nation

- In 2018/19, that their employer sent them there is the most likely reason why construction workers are based within the region/nation they are currently working in (51%) and the fact that they grew up there/have always lived there is the second most common reason (43%). Previously, family reasons have predominated. Directly employed workers are more likely than the self-employed or agency workers to report their employer sent them to their current site (57% cf. 46% and 38% respectively). Northern Ireland and the South West have the highest proportion of workers located in the region/nation due to growing up/always living there (70% and 68% respectively), while in London the proportion is significantly lower (16%).
- More than two-fifths of workers have worked within their current region/nation for their entire construction career (44%) and, in total, just over three-quarters of construction workers have remained in the current region/nation for all or most of their career (77%).
- Workers based in Scotland (76%) are most likely to have spent all their careers in their current region/nation, while workers in the East of England (27%) and the South East (32%) are least likely.
- In the majority of cases, workers' last construction 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. Workers based in Scotland (98%), followed Northern Ireland (93%), the North West (91%), and the North East (90%) are most likely to have been working in the same region/nation, whilst construction workers in the East of England (52%) are least likely. For workers now based in the East of England that did not work in these regions/nations previously, the highest proportion were last working on sites based in London (31%).

Worker origins

- Overall, nearly three-quarters of all construction workers were interviewed in the same region/nation in which they were living in when they started their construction career (72%). However, there are considerable variations in the extent to which workers have remained in their original locality. Workers currently based in Scotland (96%), Northern Ireland (95%), Wales (93%), and the North East (93%) are most likely to have remained in the same region/nation in



which they were based when they started their construction careers, whilst workers now based in the East of England are least likely to have been living there when they started their careers (44%).

- There are great variations by region/nation in terms of whether workers have remained in the same region/nation in which they did their first qualification/training, varying from virtually all of those now based in Scotland (96%) and Northern Ireland (93%) down to less than half of those now based in the South East (41%). Of those now based in the East of England, the highest proportion who did not study/train there did their training in London (24%). Whereas, of those now based in London but did not study/train there, the highest proportion were based in the South East when they did their first construction qualification (16%).

Travel to site

- Two in five construction workers have travelled at least 50 miles from their permanent/current home to work in the last 12 months (41%), which includes 1 in 6 that have travelled more than 100 miles (17%). By region/nation workers in Scotland (28%) and Yorkshire and the Humber (28%) are most likely to have travelled 100+ miles to work.
- Overall, 5% of construction workers are currently staying in temporary accommodation while working at their site. The proportion is highest amongst workers based in London (10%) and lowest in the North East (1%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 18 miles, which is less than in 2015 (22 miles) and 2012 (28 miles).

Site duration and change

- In nearly two-fifths of cases, temporary workers do not know how much longer they can expect to be working for their current company/agency (38%).
- When all respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase, 1 in 6 expect to stay on that site for a year or longer (18%), which is a lower proportion than in 2015 (26%).
- However, there would appear to be less uncertainty in 2018/19 as fewer workers than in 2015 do not know how much longer they can expect to be on site (16% cf. 24%).
- By region/nation, workers in Scotland are most likely to be unsure of how much longer they will be working at that site (28%).
- More than four-fifths of all construction workers are confident that when they finish their current job their next job will allow them to travel to work from their permanent home on a daily basis (84% cf. 75% in 2015). The remaining 1 in 6 said it depends/they don't know or that they are not able to commute.



Sub-sector and sector mobility

Sub-sector mobility

- Compared with 2015 there has been a significant increase in the proportion of construction workers that have been working in all areas except new housing. In 2018/19, half have worked on commercial work (51% cf. 35% in 2015) or public non-housing work (51% cf. 33% in 2015). The proportion of construction workers that have been involved in infrastructure projects has increased from around a fifth in 2015 (21%) to around a third in 2018/19 (31%).
- Three in ten construction workers have only worked on one project type (30%), compared with nearly half in 2015 (48%). This suggests a greater amount of diversity in terms of the work that construction workers have been involved in more recently.
- The number of project types worked on varies significantly by region/nation. In the East Midlands more than half of construction workers have only worked on one project type (55%), compared with around a fifth of construction workers based in Northern Ireland (21%). Where this proportion is relatively low it suggests that the type of construction work on offer requires workers to be more flexible in terms of the type of work they undertake. This is also the case within the East of England, Scotland, the South East and South West, where the proportions of workers that have worked on just one project type are around a quarter.

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 five years' time, they will still want to be working in construction. Amongst respondents of all ages around half say they definitely will be (48%); a further nearly two fifths think it is very or quite likely (37%); 5% consider it unlikely; just 1% say they definitely won't be; a further 4% hope to be retired by then; while 5% do not know. Amongst those that feel it is unlikely that they will still be working in the sector in five years' time, working in a less physical job role and undertaking more interesting work are the main reasons for considering leaving construction.



Introduction

Aims and objectives

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

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

The specific objectives of this research project were to:

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

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

Method

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



Sampling

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

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

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

Project eligibility criteria:

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

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

Telephone-based site recruitment

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

Site visits

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



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

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

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

Figure 1: Interviews and weights by region/nation

	Interviews	Weighted profile (approx) %
North East	411	3.9
North West	282	10.5
Yorkshire and the Humber	333	8.1
East Midlands	411	7.4
West Midlands	412	8.1
East of England	298	10.8
London	375	13.6
South East	403	14.4
South West	277	8.6
Scotland	404	8.0
Wales	287	4.3
Northern Ireland	155	2.2
UK	4048	

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

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

Notes on reading this report

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

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

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

Tables and graphs are all labelled with a simple sequential 'Figure Number' and title. All tables and graphs have clearly labelled base sizes (for all sub-groups) and textual definitions of bases.



The total of percentages shown in a table may vary slightly from 100% due to rounding to the nearest percentage point.

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

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



Profile of construction site workers

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

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

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

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

Personal demographics

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

As in previous years of the survey, the vast majority of construction workers in manual roles interviewed were male (98%; 99% in 2015). Male dominance is greater in the survey sample than in the UK construction workforce as a whole as this survey does not include those in office-based roles within the construction industry (either administrative or professional, where the incidence of female workers is higher) and interviews were conducted on relatively large construction sites (valued at £250,000+, with at least 10 workers), thereby excluding female construction workers on small building sites and maintenance and repair.

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

	2018/9	2015		UK Workforce*
	%	%		%
Male	98	99	Male	53
Female	1	<0.5	Female	47
Transgender	<0.5	-	Transgender	-
Non-binary	<0.5	-	Non-binary	-
Prefer not to say	<0.5	<0.5	Prefer not to say	-
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>		<i>32,277,500</i>

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



The youngest age group (16 to 24 year olds) account for around 1 in 6 construction workers (17%), similarly to 2015 and 2012 (18% after rounding). The proportion of workers aged 25 to 34 years is also similar (28% cf. 29% in 2015); while the proportion of workers aged 35 to 55 is slightly higher than in 2015 (at 43%, compared with 42%). Around one in ten is aged 55 and over (12%; 10% in 2015). As in 2015, workers aged 60 and over account for just 4% of construction workers.

Compared with the UK workforce overall, a higher proportion of construction workers are aged under 35 years (45% cf. 36% of economically active adults across the UK).

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

Base: All respondents

	2018/9	2015	2012		UK Workforce*
	%	%	%		%
16 to 19 years	5	5	4	16 to 19 years	4
20 to 24 years	12	13	15	20 to 24 years	9
25 to 34 years	28	29	29	25 to 34 years	23
35 to 44 years	23	22	24	35 to 49 years	33
45 to 54 years	20	20	18	50 to 64 years	27
55 to 59 years	7	6	10		
60+ years	4	4		65+ years	4
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>	<i>4933</i>		<i>32,277,500</i>

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

In terms of ethnicity, the vast majority of construction workers are of White origins (94% as in 2015 cf. 95% in 2012). Within this proportion, three per cent describe themselves as White Irish (as in 2015 cf. 5% in 2012) and an increased proportion, compared with 2015, describe themselves as 'White Other' (12% cf. 9% in 2015 and 7% in 2012).

Workers of Black (2%) and Asian (2%) ethnic origin (BME) make up the same proportion of the sample as in 2015 and 2012. Compared with the UK population as a whole (aged 16-64) a higher a proportion of construction workers are of White origins (94% cf. 85% amongst the UK population).

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

All respondents

	2018/9	2015	2012	UK Population aged 16-64*
	%	%	%	%
White	94	94	95	85
Black	2	2	2	3
Asian	2	1	1	6
Mixed	1	-	-	1
Other/Not stated	1	3	1	4
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>	<i>4933</i>	<i>41,217,200</i>

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



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

Overall, 6% of construction workers across the UK sample are BME, compared with a higher incidence of 15% across the UK population.

By region/nation, as in the population overall, the highest incidence of BME construction workers is in London (15% are BME). The South East accounts for the next highest proportion of BME construction workers (10%), whilst in the population overall the next highest proportion of BME residents is in the West Midlands (20%).

Compared with 2015, the proportion of construction workers that are of BME origin has increased in several regions, including Yorkshire and the Humber (from 2% to 5%), the South West (from 2% to 5%), the North West (from 1% to 3%), the West Midlands (from 5% to 7%), the East of England (from 3% to 5%) and the South East (from 8% to 10%).

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

Base: All respondents

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

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



For the first time in this survey, construction workers were asked for detail about their nationality and country of origin.

The majority of construction workers (83%) originated from the UK and the remaining 17% originated from another country. No more than 1% of construction workers originate from a single specified country, with the exception of Romania, from which 5% of construction workers originate (increasing to 15% in London and 10% in the East of England), while one in ten construction workers originate from another EU country (10%, increasing to one in six workers in the East of England – 18% - and one in three workers in London - 31%).

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

Base: All respondents

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

Q45

Focusing on specific construction trades, there are a higher-than-average proportion of construction workers from other (i.e. not UK) EU countries amongst painters and decorators, dryliners, and pipe fitters (all 19%).

Nineteen per cent of agency construction workers originate from other EU countries, compared with 15% of self-employed workers and just 5% of workers that are employed directly. Construction workers from other EU countries are more than twice as likely as those from the UK to be indirectly employed (13% of these workers work for an agency, compared with 6% of UK-born construction workers).

One in seven construction workers (14%) hold a passport for another country. This increases to 38% of construction workers in London, 30% in Northern Ireland, and 24% in the East of England. The majority hold a UK passport (89%), with a further 5% reporting that they do not have a passport.

Of those construction workers that were born outside of the UK or have a non-UK passport, 14% have British citizenship.

Four-fifths of construction workers have lived in the UK all of their life (80%). This is a lower proportion than in 2015 (84%). This proportion varies greatly by region/nation, from virtually



all in the North East (97%) and in Scotland and Wales (both 94%), down to less than three-quarters in the East of England (71%) and South East (73%) and to half in London (50%).

The majority of the remainder (14% of all construction workers) have lived in the UK for more than 5 years. This is the case across all regions/nations, although a higher than average proportion of construction workers originating from outside of the UK and who have lived in the UK for less than 5 years are to be found in London (17%, compared with 6% across the UK as a whole).

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

Base: All respondents

<i>Row percentages</i>	<i>Unweighted bases</i>	All their lives %	Up to 5 years %	More than 5 years %
UK	4048	80	6	14
East Midlands	411	92	2	6
East of England	298	71	7	22
London	375	50	17	33
North East	411	97	1	2
North West	282	91	2	7
South East	403	73	7	20
South West	277	86	3	11
West Midlands	412	86	6	8
Yorkshire and the Humber	333	86	3	11
Wales	287	94	1	5
Scotland	404	94	2	4
Northern Ireland	155	90	2	8

Q39

Amongst all construction workers, three per cent 3% indicate that they have a long term illness, health problem or disability which limits the type of work they can do. This is the same proportion as in 2015. The most common illness/disability amongst these workers is a reduced physical capacity (i.e. inability to lift, carry or otherwise move everyday objects), debilitating pain and lack of strength, breath, energy or stamina, asthma, angina or diabetes (50%).



Occupational profile

Current job role

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

As in the 2015 and 2012 surveys, labourers/general operatives account for the highest proportion of construction workers, although they account for a lower proportion than in 2015 (16% cf. 18% in 2015 and 22% in 2012). Bricklayers account for the next highest proportion of workers (11% cf. 15% in 2015 and 10% in 2012), along with site managers (11% cf. 8% in 2015 and 1% in 2012), followed by carpenters/joiners (10%).

Figure 8: Occupational profile

Base: All respondents

	2018/19 %	2015 %
Labourer/General operative	16	18
Bricklayer	11	15
Site manager	11	8
Carpenter/joiner	10	11
Plant/machine operative (e.g. Fork lift/JCB)	7	7
Electrician	6	5
Plumber	4	5
Scaffolder	4	4
Ground worker	4	4
Technical e.g. surveyor, maintenance technician	4	2
Dryliner	3	3
Painter/decorator	2	3
Roofer	2	2
Pipe fitter	2	1
Banksman/Banksperson	1	2
Ceiling fixer	1	1
Mechanical fitter	1	*
Plasterer	1	2
Steel erector/rigger	1	1
Glazer/window fitter	1	1
Supervisor/foreman	1	1
Project Manager	1	*
Concrete worker	1	*
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>

Q5



Looking at variations a number of significant differences are evident, including higher than average proportions of:

- Labourers/general operatives in Scotland (27%) and the North East (23%);
- Bricklayers in the East Midlands (27%), Northern Ireland (20%) and Wales (15%);
- Site managers in London (17%) and the North West (17%);
- Plant/machine operatives in Northern Ireland (15%) and Wales (12%);
- Technical occupations, e.g. surveyors, maintenance technicians etc, in London (9%).

Supervisory roles

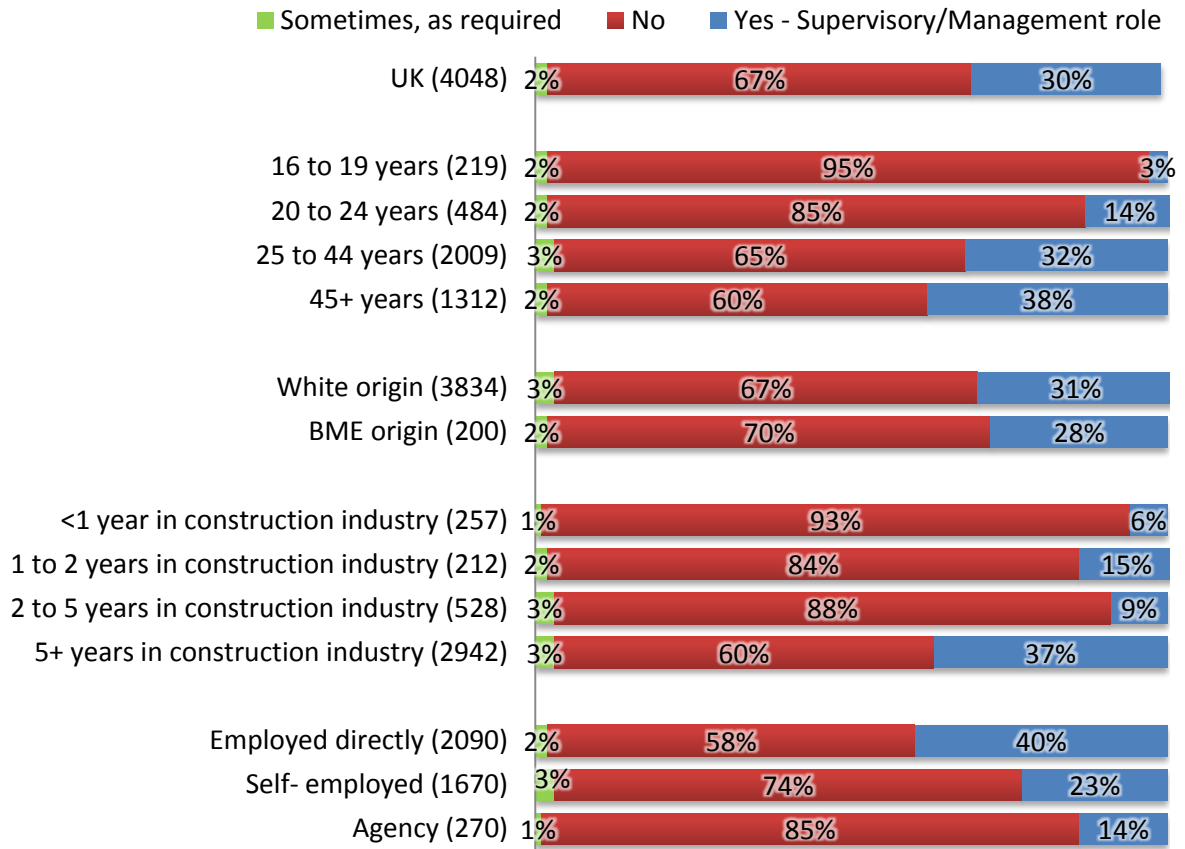
Three in ten construction workers interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (30% cf. 25% in 2015 and 17% in 2012).

The incidence of workers in a supervisory role is significantly higher than average in London (45%), the East of England (40%), and the North West (37%). It is significantly lower amongst workers aged under 25 (3% of 16-19 year olds; 14% of 20-24 year olds) and increases to 38% of workers aged 45+ years old. A higher proportion of those that have worked in the construction industry for more than 5 years have supervisory roles (37%), than those that have worked in the industry for less than 5 years (6% up to a year; 15% where 1 to 2 years; 9% where 2 to 5 years).

Workers who are directly employed by a company are significantly more likely than those who are self-employed or work for an agency to perform a supervisory role (40%, compared with 23% and 14% respectively). These differences are summarised in the following figure.



Figure 9: Whether respondents perform a supervisory or management role
 Base: All respondents



Unweighted bases in parentheses Q8



Employment status

Around half of construction workers in this year's sample are directly employed by a company (49%), which is a lower proportion than reported in 2015 (54%), but similar to that reported in 2012 (48%).

The next highest proportion of construction workers is self-employed (43%) and this is a higher proportion than in 2015 (39%), but lower than in 2012 (46%). The proportion of workers who are self-employed is higher amongst those that have worked in construction for more than 5 years than amongst those that have worked in the industry for less time (45%, compared with 38%).

Just 7% of the sample is accounted for by construction workers who are working for an employment agency, although the proportion is higher amongst those who have only been working in the construction industry for up to 2 years (14%). This is summarised in the following table.

Figure 10: Employment status

Base: All respondents

	2018/19 %	2015 %	Years working in construction %			
			<1	1-2	2-5	5+
Employed directly by a company (contractor or sub-contractor)	49	54	54	49	48	49
Self-employed	43	39	31	37	42	45
Working for an employment agency	7	6	14	13	10	6
Working on some other basis	*	*	1	2	*	*
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>	<i>257</i>	<i>212</i>	<i>632</i>	<i>2942</i>

*Denotes less than 0.5%

Q20

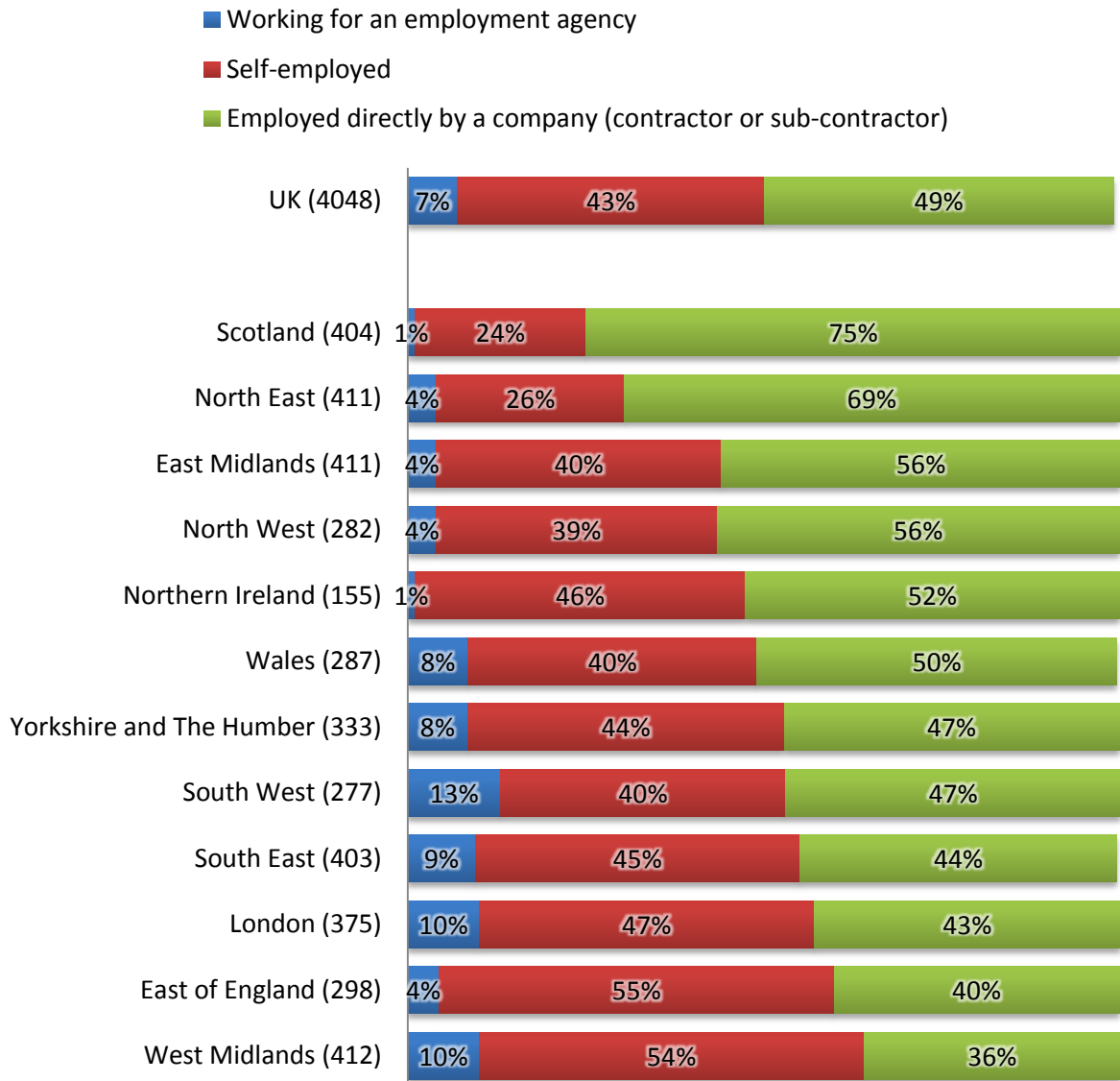
Workers of a white ethnic origin are significantly more likely than those of BME origin to be employed directly (50% cf. 42%), whilst BME workers are significantly more likely to be working for an employment agency (14% cf. 7% of workers from white ethnic origins).



There are also a number of variations by region/nation, as Figure 11 summarises. The proportion of workers that are employed directly is highest in Scotland (75%) and the North East (69%), and lowest in the West Midlands (36%). The proportion of construction workers who are self-employed ranges from 55% in the East of England and 54% in the West Midlands, down to 26% in the North East and 24% in Scotland.

Figure 11: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses Q20



Employment contract basis

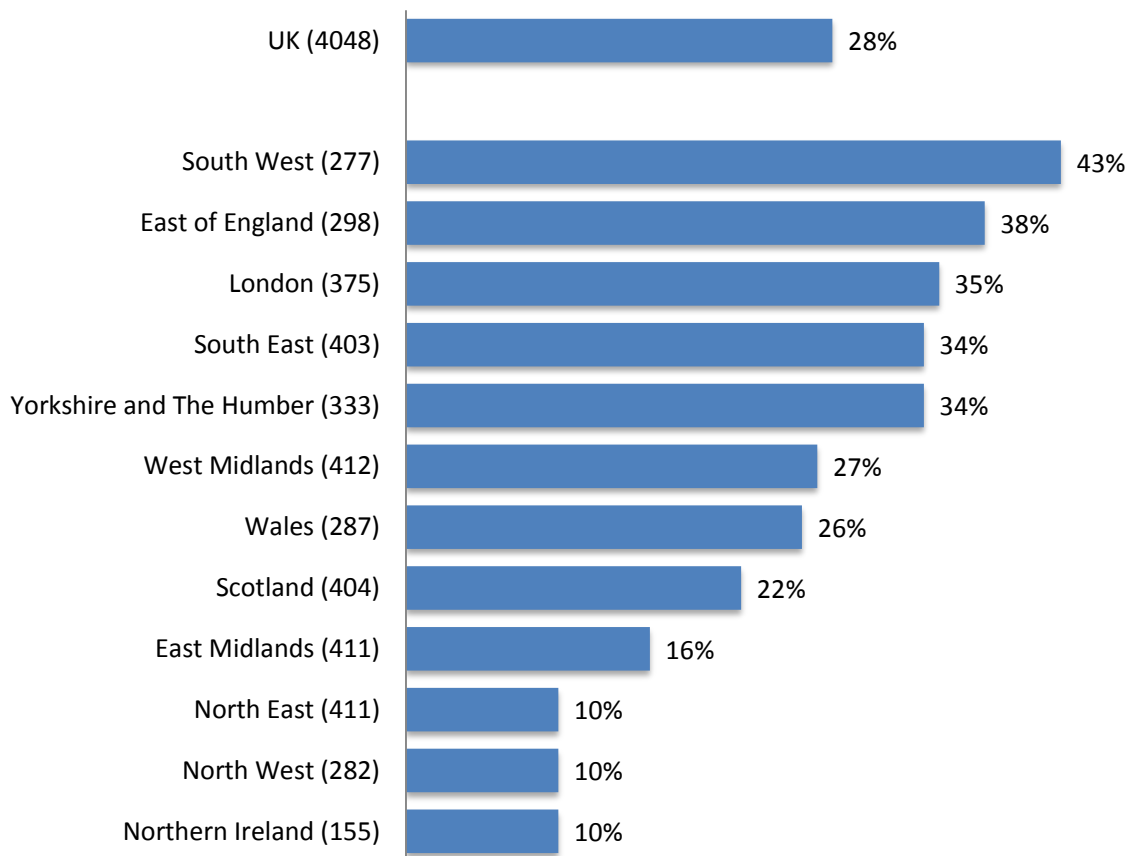
Overall, just over a quarter of all construction workers (28%) are employed on a temporary, rather than permanent basis (70%). The proportion that is employed on a temporary basis is higher than in 2015 (23%). The remainder believed they had an 'other' type of contract arrangement (2%).

Amongst workers who are employed by an agency the proportion on temporary contracts is significantly higher, as one would expect (79%), as it is amongst those who are self-employed (44% cf. 7% who are employed directly).

By region/nation, the proportion of temporary workers is higher in the South West (43%) and the East of England (38%) than in London (35%), the South East (34%) and Yorkshire and the Humber (34%). It is lowest in the North East (10%), the North West (10%), and Northern Ireland (10%), as the following figure illustrates.

Figure 12: Proportion of workers employed on a temporary basis, by region/nation (including fixed-term contracts)

Base: All respondents



Unweighted bases in parentheses Q21



By current trade/role, the proportion working on a temporary basis is higher than average amongst dryliners (39%), bricklayers (34%), plant/machine operatives (34%) and labourer/general operatives (33%) and lowest amongst site managers (13%) and scaffolders (19%).

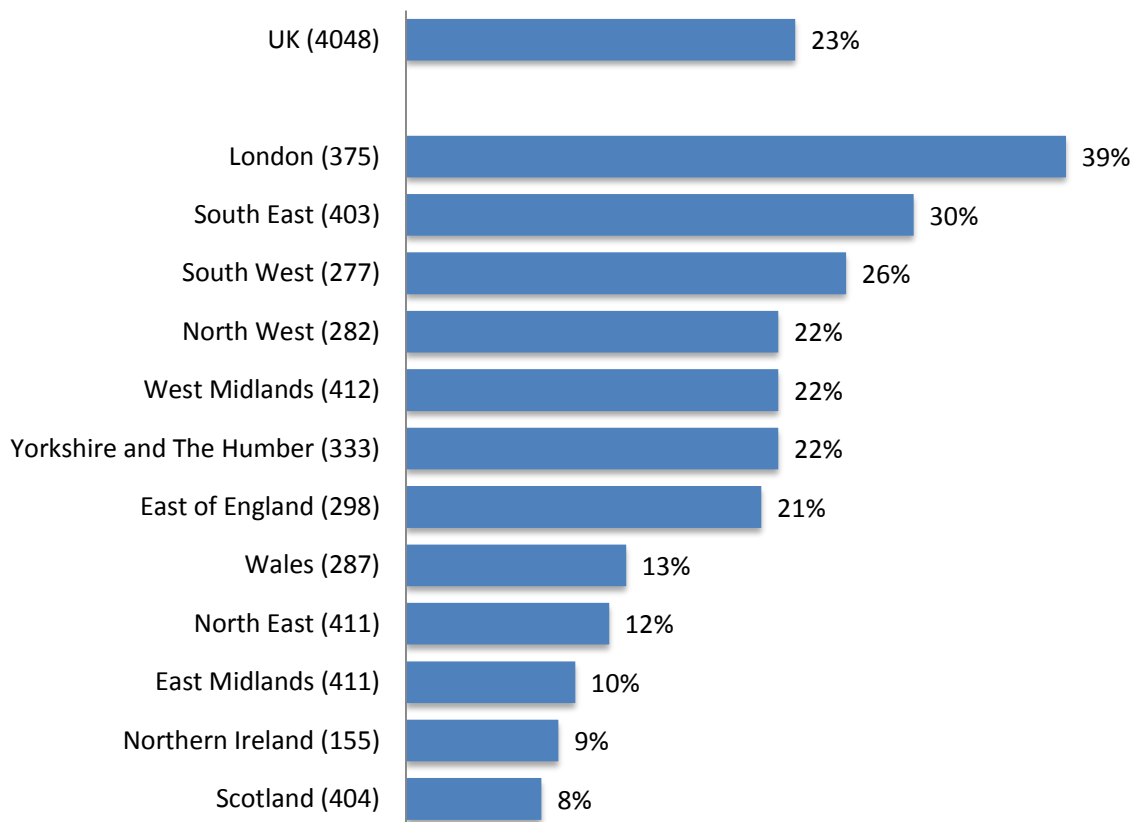
Hours worked

Construction workers are most likely to work between 40 and 49 hours per week: 60% do so. Nearly a quarter work more than 50 hours per week (23%).

The proportion that work more than 50 hours per week is significantly higher amongst site managers (39%) and also varies considerably by region/nation, from just 8% in Scotland, 9% in Northern Ireland and 10% in the East Midlands, up to 39% in London. It is lower than average within Wales (13%).

Figure 13: Proportion of workers that typically work 50 or more hours per week, by region/nation

Base: All respondents



Unweighted bases in parentheses Q22



Work histories

Time in the sector

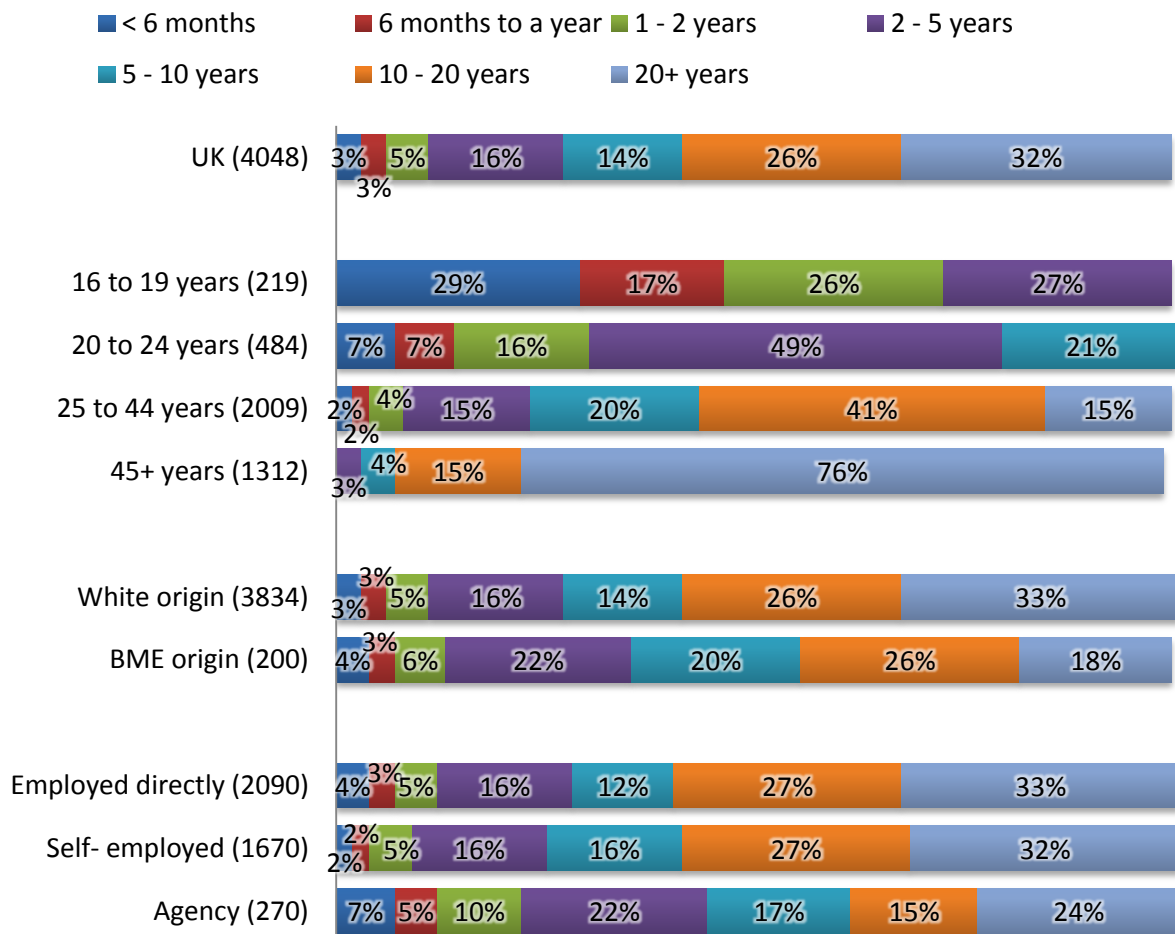
A third of all construction workers have worked in the construction industry for over 20 years (32%) and a total of more than half have worked in the industry for at least 10 years (58%). These are similar proportions to those reported in 2015 (31% and 56% respectively).

As one would expect, the length of experience in the industry increases with age, with three-quarters of all construction workers aged 45 and over having more than 20 years' experience of working in the construction sector (76%; 77% in 2015).

Workers of a white ethnic origin are more likely to have worked in the construction industry for longer compared with BME workers (59% have 10+ years' experience, compared with 44% of BME workers). Workers who are directly employed or self-employed are also more likely than those who work for an agency to have worked in the construction industry for at least 10 years (60%, 59% and 39% respectively), as the following Figure highlights.

Figure 14: Years spent working in the construction sector

Base: All respondents



Unweighted bases in parentheses Q1



Compared with 2015, Figure 15 shows little change in 2018/19 with regard to how long workers have worked in the construction sector; 32% have 20+ years' experience, compared with 31% in 2015, whilst 27% have 5 or fewer years' experience compared with 26% in 2015.

Figure 15: Years spent working in the construction sector (cumulative)

Base: All respondents

	2018/19 %	2015 %
Less than 6 months	3	4
Up to a year	6	8
Up to 2 years	12	14
Up to 5 years	28	26
Up to 10 years	42	44
Up to 20 years	68	69
More than 20 years	32	31
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>

Q1



Pre-construction employment histories

Two-thirds of workers have only ever worked in the construction industry (67% cf. 70% in 2015 and 69% in 2012). This includes over half who have worked in construction pretty much continuously (56% cf. 55% in 2015); 7% for whom this is their first job (9% in 2015); and just 4% that have only ever worked in the construction sector but have had spells out of work (6% in 2015). The overall proportion that have continuously worked in construction over the course of their working lives is slightly lower than in 2015, which is largely due to the lower proportion reporting spells of being out of work in 2018/19.

The likelihood that workers have worked continuously in construction increases with age; up to nearly two-thirds of workers aged 60 and over (65%), whilst, as one would expect, younger workers are more likely to say that this is their first job (21% of 16 to 19 year olds).

Figure 16: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.

All respondents

	2018/19 %	2015 %	Age %			
			16- 19	20 to 24	25 to 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	56	55	49	52	56	60
I have only worked in construction jobs but have had spells of being out of work	4	6	2	3	5	4
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	7	8	4	7	8	6
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	19	17	23	25	22
This is my first job. I haven't worked in any other industry.	7	9	21	10	4	7
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	3	3	6	5	3	2
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>	<i>219</i>	<i>484</i>	<i>2009</i>	<i>1312</i>

Q2

Overall, around one in four construction workers 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 (23%). This compares with nearer a fifth of workers in 2015 (19%) but is the same as reported in 2012.

The proportion of respondents who have worked in other sectors before construction is significantly higher amongst those employed by an agency (37%) and amongst those with less than a year (38%) or between 1 and 2 years of experience (37%) of working in the construction sector. BME workers are also significantly more likely than those of a white



ethnic origin to have worked in other sectors before coming to the construction industry (32% cf. 23%). By region/nation, the proportion of workers that have previously worked in other sectors varies from 30% in London, 29% in the South East, and 28% in the East of England to 6% in Northern Ireland and 8% in Scotland.

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. As in 2015, around one in five cases respondents had previously worked in the wholesale/retail sector (19%; 22% in 2015) but a significantly higher proportion than in 2015 had worked in manufacturing beforehand (45% cf. 20% in 2015).

There are significant differences in these proportions by region/nation. Two-thirds of those having worked in other industries have worked in manufacturing within the West Midlands (67%) and the proportion is also higher than average in the North West (61%). This compares with just 20% of construction workers with experience of other sectors in Northern Ireland. Around two-fifths of construction workers who have worked in other industries within Scotland and Wales have worked in wholesale/retail (41% and 37% respectively). This compares with just 5% in Yorkshire and the Humber. Agriculture/forestry/fishing is relatively key as a sector in which construction workers previously worked in Northern Ireland (40%), the North East (26%) and South West (19%), and other primary industries (mining and quarrying) were cited by one in five construction workers with experience of other sectors in the North East (20%) and the East Midlands (19%).

Overall, fewer than one in ten construction workers who worked in another sector before working in construction previously worked in either agriculture/forestry/fishing (9%), transport/storage (6%) or mining and quarrying (6%).

Figure 17: Industry worked in before starting work in the construction sector

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

	2018/19 %	2015 %
C – Manufacturing	45	20
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	19	22
A - Agriculture, Forestry and Fishing	9	6
H - Transportation and storage	6	10
B – Mining and quarrying	6	6
<i>Unweighted bases</i>	862	983

Q3

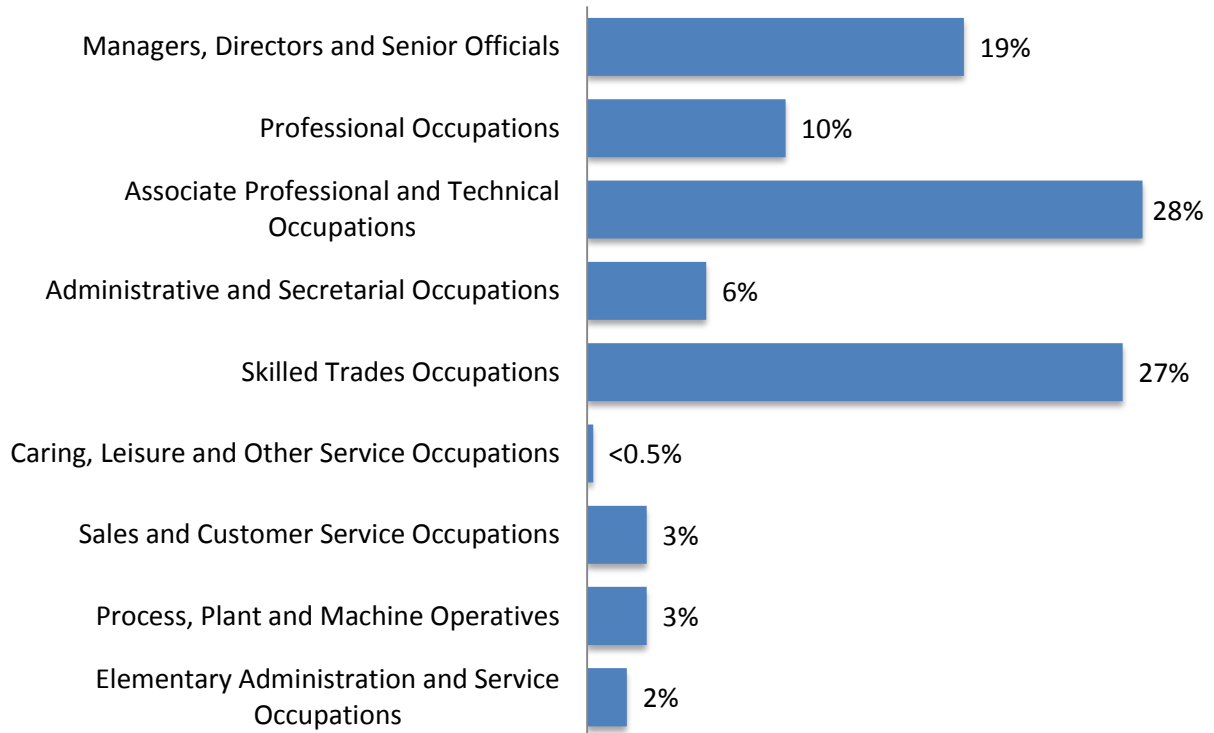


In terms of the job roles that respondents have held in other sectors, the highest proportion was in associate professional and technical occupations (28% cf. 12% in 2015) and the next highest proportions was in skilled trade occupations (27% cf. 29% in 2015).

One in eight workers that worked in other sectors before the construction sector worked as managers, directors or senior officials (19% cf. 5% in 2015).

Figure 18: Job roles undertaken in other sectors

Base: Where first job was not in construction



Unweighted base = 862 Q3

By region/nation, a higher proportion of construction workers were in associate professional and technical occupations in the North East (60%), East Midlands (52%) and South East (49%). Yorkshire and the Humber and the North West stand out in terms of the proportion of workers who were in skilled trades occupations in other sectors before working in construction (42% and 38% respectively), while in the South West and South East there is a higher than average proportion of workers that previously worked as managers, directors and senior officials in other sectors (29% and 26%).



Occupational switching and progression within construction

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

Overall, over a third of all construction workers have worked in more than one construction trade or occupation whilst working in the construction industry (36%). This represents a slight increase since 2015 (34%), when a significant increase was reported compared with 2012 (22%).

Naturally, the proportion of workers that have had more than one role increases with age (to 42% amongst those aged 45+ cf.14% amongst those 16 to 19 years) and with the length of time respondents have worked in construction (41% amongst those with 5+ years of experience cf. 12% who have worked in the sector for less than a year).

The proportion that has worked in more than one role is also significantly higher amongst those who currently work for an agency (51%) than among those who are employed directly or self-employed (both 35%). Workers with the highest level of qualifications (Level 4 and above) are also significantly more likely to have had more than one role or occupation within the construction sector (59%), as are those currently in a supervisory role (49%).

Underlining the greater propensity for construction workers in a supervisory role to have worked in more than one construction trade or occupation, site managers are significantly more likely than average to have done so (69%). More than half of plant/machine operatives have worked in other trades or occupations (55%), while job roles with the lowest propensity to have done so include electricians (17%) and painters/decorators (18%).

The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector.

Figure 19: Other construction roles undertaken, by current occupation

Base: All respondents

MORE likely to have had more than one role (ave. 36%)			LESS likely to have had more than one role (ave. 36%)		
	2018/19 %	2015 %		2018/19 %	2015 %
Site manager (83)	69	69	Scaffolder (166)	34	31
Plant / Mach. Op. (315)	55	55	Labourer/General operative (707)	29	33
Dryliner (112)	40	38	Technical (171)	29	-
			Pipe fitter (62)	27	-
			Roofer (82)	27	27
			Plumber (156)	26	13
			Bricklayer (514)	24	19
			Carpenter/joiner (429)	22	18
			Plasterer (51)	21	34
			Painter/decorator (95)	18	27
			Electrician (227)	17	13

Unweighted bases for 2018 in parentheses

Q6



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 have previously worked in, with each worker able to list all previous occupations. Amongst these, 36% of all construction workers that have worked in at least one other role/occupation 8% have worked in 1 previous role; 55% have worked in 2 previous roles; 22% have worked in 3 roles/occupations; 8% have worked in 4 roles/occupations, and 7% have worked in 5 or more previous roles/occupations. The highest number of previous occupations worked in, within the construction industry, is 12.

Figure 20 summarises the previous trades/occupations most frequently listed by those who have worked in other roles in the construction sector.

Workers are most likely to have previously worked as a labourer/general operative (34%), while 1 in 5 have previously worked as a carpenter/joiner (19%) and 1 in 8 as a bricklayer (12%). This echoes 2015 findings.

Figure 20: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	2018/19 %	2015 %
Labourer/General operative	34	30
Carpenter/joiner	19	18
Bricklayer	12	13
Plant/machine operative (e.g. Fork lift/JCB)	10	10
Dryliner	8	7
Plasterer	8	7
Roofer	8	9
Painter/decorator	7	8
Banksman/Banksperson	6	7
Ceiling fixer	5	4
Electrician	5	3
Plumber	5	5
Site manager	5	5
Ground worker	5	5
Floorer	4	3
Pipe fitter	4	5
Scaffolder	4	4
Steel erector/rigger	4	3
Technical e.g. surveyor, maintenance technician	3	4
Welder	2	2
Mechanical fitter	1	1
Glazer/window fitter	1	1
Supervisor/foreman	1	1
Tilers	1	1
Contracts Manager	1	<0.5
Other	7	6
<i>Unweighted base</i>	<i>1328</i>	<i>1576</i>

Q7



There are particularly high proportions of workers currently working as scaffolders or plant/machine operatives who have previously worked as labourers/general operatives (65% and 59% respectively). Amongst site managers nearly two-fifths have previously worked as carpenters (39%), whilst plumbers are most likely to have previously worked as pipe fitters (31%) and dryliners are most likely to have previously worked as carpenters (35%) and/or ceiling fixers (31%).



Figure 21: Previous roles worked in, by current occupations/trades

Base: Workers that have switched occupations within construction

Previous occupation	All %	Current occupation													
		Bricklayer %	Carpenter/ joiner %	Dryliner %	Electrician %	Labourer/ General op. %	Painter/ decorator %	Pipe fitter %	Plant/ machine operative %	Plasterer %	Plumber %	Roofer %	Scaffolder %	Site manager %	Technical %
Labourer/General op.	34	42	31	15	40	0	46	24	57	35	12	39	65	25	37
Carpenter/joiner	19	22	0	35	5	11	0	30	9	12	23	9	19	39	18
Bricklayer	12	0	12	4	6	14	7	2	12	12	8	17	15	20	18
Plant/machine operative	10	7	5	5	0	18	0	18	0	0	0	4	2	12	17
Dryliner	8	5	19	0	2	8	28	10	5	35	0	4	0	9	0
Plasterer	8	13	9	19	10	13	26	0	6	0	5	9	2	8	0
Roofer	8	9	9	6	10	11	7	10	7	7	11	0	3	6	5
Painter/decorator	7	3	11	11	4	15	0	0	6	25	0	2	9	5	0
Banksman/Banksperson	6	2	6	0	0	10	0	12	12	0	4	6	7	4	12
Ceiling fixer	5	3	14	31	0	3	17	0	2	23	0	0	0	4	0
Electrician	5	1	4	5	0	8	0	0	1	0	13	0	5	7	2
Plumber	5	4	6	0	8	6	6	22	5	0	0	14	2	5	0
Site manager	5	4	10	5	8	3	3	14	3	0	6	6	0	0	21
Ground worker	5	11	0	7	8	3	0	0	8	0	7	14	2	5	0
Floorer	4	9	9	2	0	6	15	10	3	0	0	0	3	1	2
Pipe fitter	4	1	1	6	0	4	0	0	3	12	32	0	0	4	4
Scaffolder	4	10	6	0	0	3	0	0	3	0	5	12	0	2	12
Steel erector/rigger	4	1	3	1	8	4	0	0	5	0	0	0	0	5	4
Technical	3	2	2	0	4	1	0	0	3	0	2	0	0	8	0
Welder	2	1	3	0	0	1	6	7	3	0	5	0	0	1	3
<i>Unweighted bases</i>	<i>1328</i>	<i>109</i>	<i>84</i>	<i>93</i>	<i>137</i>	<i>51</i>	<i>33</i>	<i>30</i>	<i>32</i>	<i>64</i>	<i>218</i>	<i>21</i>	<i>53</i>	<i>259</i>	<i>28</i>



Future career plans

Construction workers were asked to think about their future career plans and whether they thought it was likely they would still want to work in construction in five years' time. Overall, three-quarters (74%) felt it was very likely that they would still want to. This included just under half of all construction workers (48%) that felt that they *definitely* would. Only 5% of all construction workers thought it would be unlikely that they would still want to work in construction in five years' time. The remainder thought it quite likely (11%), or that they would be retired (4%), or were unsure (5%).

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 50% of construction workers aged 60 and over. The proportion that felt they definitely would still want to work in the construction sector in five years increases with age but peaks amongst 45-54 year olds (54%). It is also still relatively high amongst 55-59 year olds (50%) even though workers in this age group are also more likely than average to be hoping to retire in five years' time (15%). The youngest workers are significantly more likely to report that it was *quite* likely that they would still want to work in construction in five years' time (20% of 16-19 year olds).

Figure 22: Likelihood of construction workers still wanting to be working in the construction sector in five years' time

Base: All respondents

	All %	Age %					
		16 to 19	20 to 24	25 to 44	45-54	55-59	60+
Definitely will be	48	43	47	48	54	50	22
Very likely	26	28	27	29	24	22	13
Quite likely	11	20	12	13	8	7	5
Quite unlikely	2	1	3	2	2	1	2
Very unlikely	2	2	2	1	2	2	5
Definitely will not be	1	1	1	1	2	1	1
Hope to be retired	4	0	<0.5	<0.5	4	15	50
Don't know	5	6	7	5	3	2	2
<i>Unweighted bases</i>	<i>4048</i>	<i>219</i>	<i>484</i>	<i>2009</i>	<i>818</i>	<i>301</i>	<i>193</i>

Q38A



As above, 5% of construction workers felt it was unlikely that they would still want to work in the construction sector in five years' time. These workers were asked the reasons why. They were most likely to cite the fact that work outside of construction might be less physical (32%), while more than a quarter thought they might find more interesting work outside of construction and that they would be bored of what they are doing now and need a change (27%). Boredom or the need for more interesting work was significantly more likely to be cited among 20-24 year olds (43%), while the desire for less physical work increased with age (from 12% of 16-19 year olds to 33% of 25-44 year olds to 45% of 55-59 year olds).

Around 1 in 5 construction workers that felt it is unlikely that they will still be working in the construction sector in five years' time (19%) cited expectations of better pay outside of construction. This proportion is considerably higher amongst 35-44 year olds (32%). A quarter of 25-44 year olds (24%) cited more suitable hours/conditions outside of construction, and were more likely to do so than average (16%).

There are few differences by current job role (not least because sample bases are small for some job roles). However, labourers/general operatives who felt it is likely they will leave the construction sector in the next five years were significantly more likely than average to cite better paid work outside of construction (34%) and the potential to better use their skills/abilities outside of construction (27%, compared with 16% on average).

Figure 23: Reasons for not wanting to be working in the construction sector in five years' time – prompted, multiple response

Base: Those unlikely to be in construction in five years' time (211)



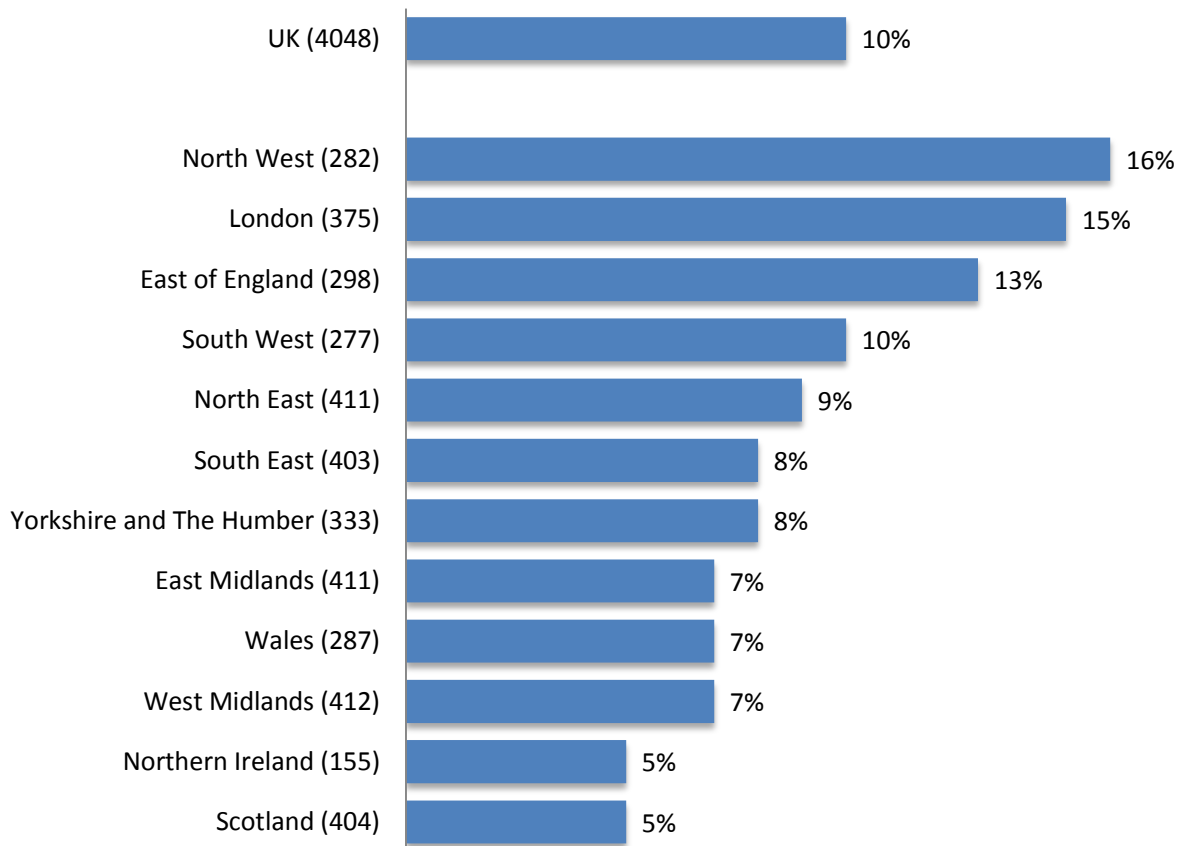


Thinking about their future plans in construction 8 in 10 construction workers would like to carry on in the same trade or occupation (80%); 1 in 10 would like to change their trade/occupation (10%); whilst the remainder would like to leave construction or were unsure. These are similar figures to those reported in 2015.

Focusing on those construction workers that would like to change their trade or occupation, by region/nation, there are higher proportions based in the North West (16%) and London (15%), while just 5% of construction workers in Northern Ireland and Scotland want to do so.

Figure 24: Proportion of construction workers that would like to change their trade or occupation within the construction sector, by region/nation

Base: All respondents



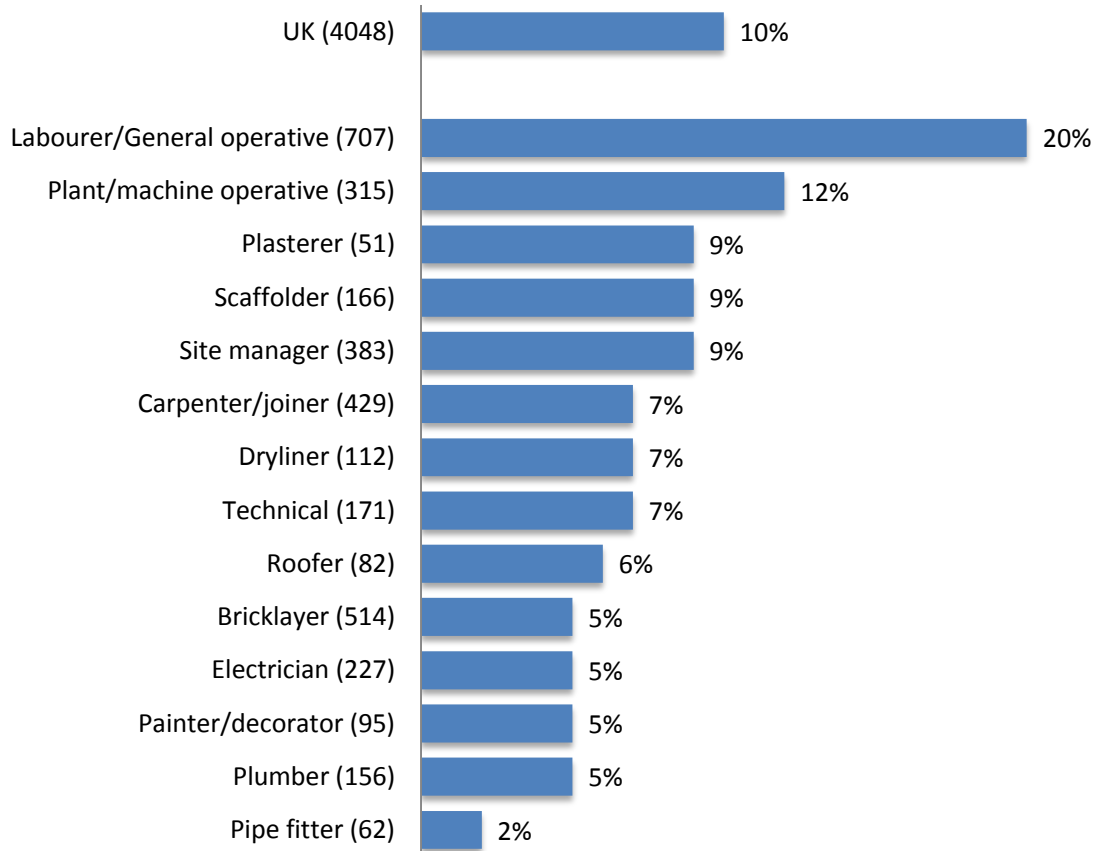
Unweighted bases in parentheses Q33



Construction workers currently working for an agency (27%) are more likely than those employed directly (8%) or are self-employed (9%) to want to change their trade or occupation. By current trade/occupation, those working as a labourers/general operatives (20%) are most likely to want to, as the following chart illustrates.

Figure 25: Proportion of construction workers that would like to change their trade or occupation, by current trade/occupation

Base: All respondents



Unweighted bases in parentheses Q33

Similarly to 2015, amongst those who would like to change trade or occupation, the highest proportion would like to be a site manager (39%). Otherwise a wide range of alternative trades/occupations are mentioned, with the next highest proportion wanting to move into a technical occupation (e.g. surveyor, maintenance technician).

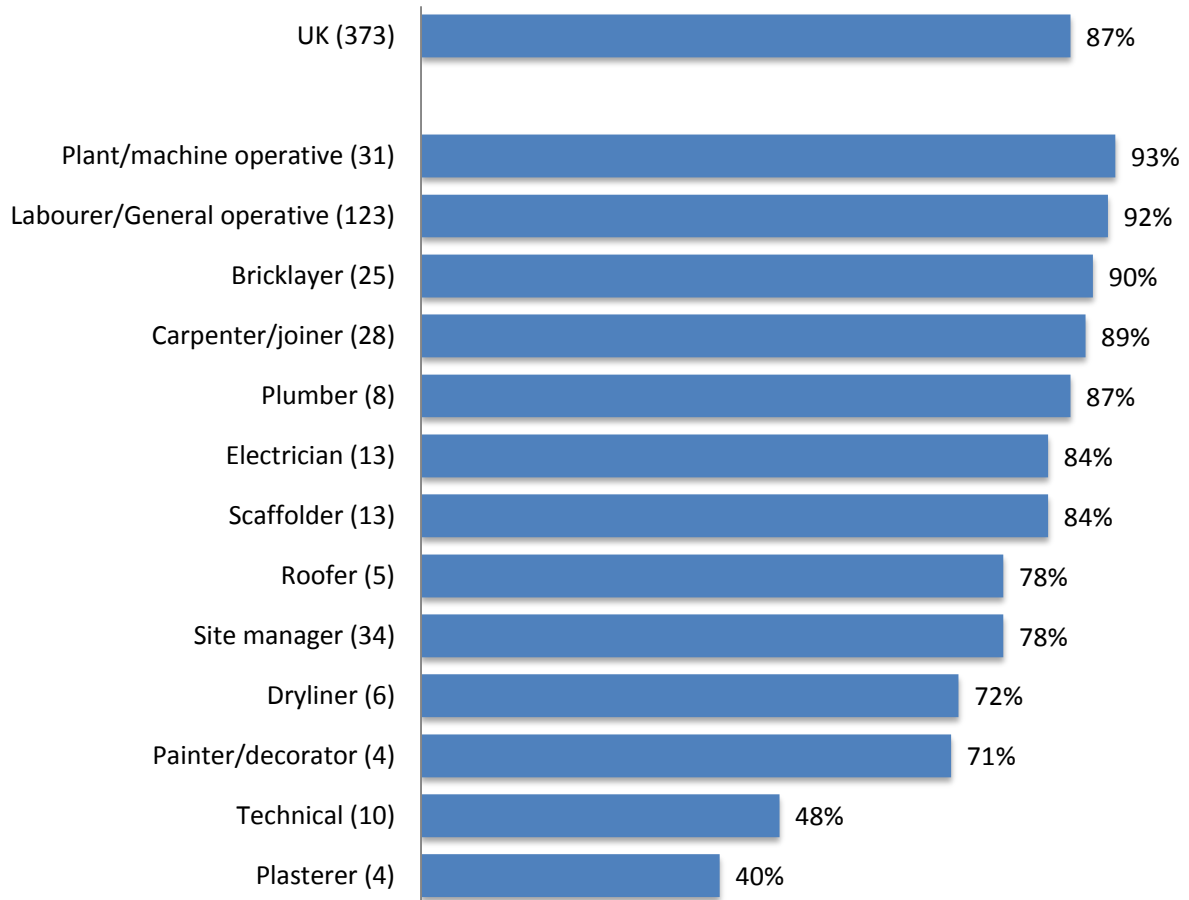
Analysis by current occupation is limited due to very low base sizes at this level. However, amongst labourers/general operatives (the trade most likely to want to change occupation) the most popular choices of new trades or occupations are bricklaying (18%), site manager (18%) and plant/machine operative (15%).



In the vast majority of cases where construction workers would like to change trade or occupation, they believe they will require further training or qualifications in order to do this other kind of work (87%). This proportion is higher than in 2015 (77%). The proportion in 2018/19 increases to 93% of plant/machine operatives and 92% of labourers/general operatives that want to move into different trades/occupations in the future.

Figure 26: Proportion of construction workers who will need further training or qualifications if they want to change their trade or occupation within the sector

Base: Workers that are thinking about changing trade or occupation in the future



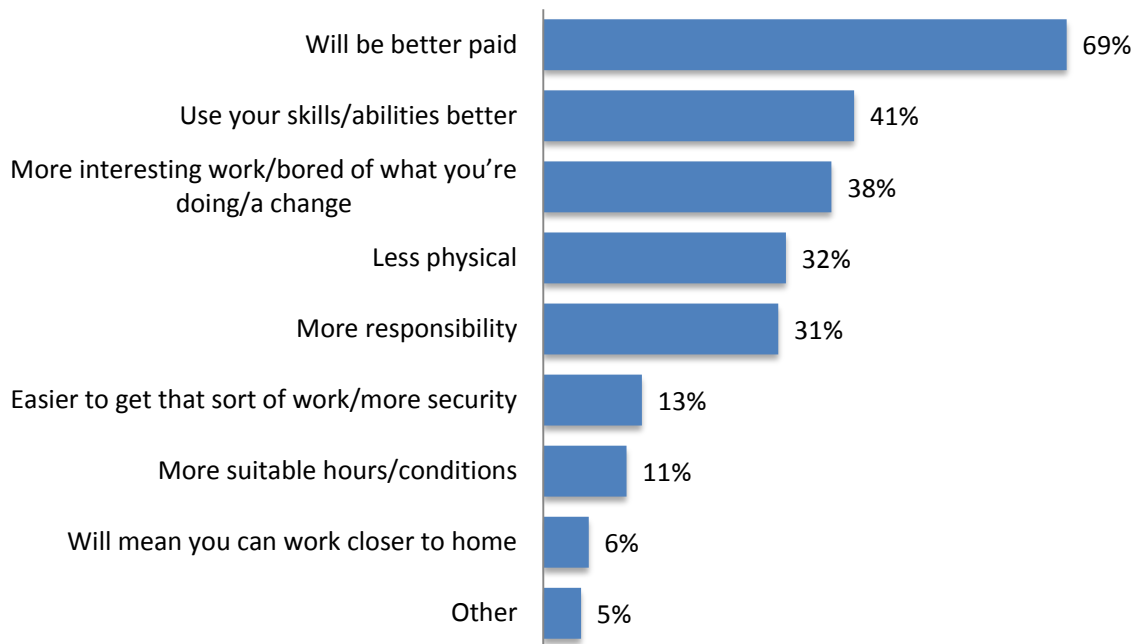
Unweighted bases in parentheses Q35



The most frequently cited reason for wanting to change trade or occupation is the expectation that they will be better paid (69%; 59% in 2015). Over two-fifths wanted to use their skills/abilities better (41%), while nearly two-fifths of those wishing to change trade believe it will mean more interesting work (38%), and slightly fewer expect whatever new trade or occupation they are considering to be less physical (32%) and/or involve more responsibility (31%).

Figure 27: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 373 Q36



Qualifications and skills

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

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

Construction skill cards and certificates

When asked which type of construction skill certificate or card they currently hold (e.g. CSCS or CSR) just 2% of all construction workers say they do not hold any card and less than 0.5% are unsure. In total, therefore, 97% of all construction workers are certain that they hold at least one type of skill card or certificate that provides evidence to construction sites that they have received a certain level of health and safety awareness training.

Figure 28 summarises the proportion of workers by region/nation that hold any card and compares these proportions with the 2015 and 2012 surveys. Workers in the West Midlands, Yorkshire and the Humber and Scotland are most likely to hold skill certificates or cards (99% in each case). The proportion holding any card in Scotland has increased since 2015, but is at a similar level now to 2012. Construction workers in Wales (92%) and the East Midlands (93%) are less likely to hold skill cards/certificates. In Scotland and Northern Ireland there has been a reversal of the significant drop in the proportions holding cards evident in 2015 compared with 2012.

Figure 28: Proportion of workers that have a skill card/certificate, by region/nation

Base: All respondents

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



As in previous surveys (2012 and 2015), the incidence of workers holding skill cards or certificates remains lower amongst the youngest workers (85% amongst 16 to 19 year olds) and those who are very new to the construction industry (84% of those that have worked in the industry for less than 6 months). However, the proportion increases to 94% of those that have worked in construction for between 6 months and a year. This suggests that the process of obtaining a card takes a few months, but those workers failing to hold a card post-six months in the industry are very much in the minority.

Further progress in this respect is indicated by the fact that those that have worked in the construction industry for between 1 and 2 years are more likely now than they were in 2015 and 2012 to hold cards/certificates (97% cf. 86% in both 2015 and 2012). Agency workers are also more likely to hold cards/certificates now than previously (97% cf. 92% in both 2015 and 2012).

Figure 29: Proportion of workers that have a skill card/certificate, by other variables
Base: All respondents

		2018/19	2015	2012
		%	%	%
Total (4048)		97	96	97
Age	16 to 19 years (219)	85	86	86
	20 to 24 years (484)	97	95	95
	25 to 44 years (2009)	98	99	99
	45+ years (1312)	98	97	97
Length of time in construction	<1 year in construction (257)	89	89	89
	1 to 2 years (212)	97	86	86
	2 to 5 years (632)	96	96	96
	5+ years (2942)	98	98	98
Contract-type	Employed directly (2090)	96	97	97
	Self-employed (1671)	98	99	99
	Agency (270)	97	92	92
Location before working in construction sector in UK	UK/ROI national (3969)	97	97	97
	Migrant worker (79)	98	98	98
<i>Unweighted bases for 2018/19 in parentheses</i>				

Q12



In terms of the type of skill card or certificate held by workers, the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (85%), as in 2015 and 2012. Overall, 3% hold the CSR (Construction Skills Register (NI)) card/certificate, but this proportion increases to 85% amongst workers from Northern Ireland, which is higher than in 2015 (70%).

Figure 30: Type of skill card/certificate held

Base: All respondents

	2018/19 %	2015 %
CSCS (Construction Skills Certification Scheme) (GB)	85	86
CSR (Construction Skills Register) (NI)	3	3
CISRS (Construction Industry Scaffolders Record Scheme)	3	4
CPCS (Construction Plant Competence Scheme)	11	13
Other	4	4
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>

Q12

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

- The proportions of workers in most job roles that hold CSCS (Construction Skills Certification Scheme (GB)) are 90% or higher, with the exception of technical occupations (85%), electricians (69%), scaffolders (62%), and plant/machine operatives (46%);
- Plant/machine operatives (69%) are more likely to hold CPCS (Construction Plant Competence Scheme);
- Three-fifths of scaffolders (59%) hold CISRS (Construction Industry Scaffolders Record Scheme) - which is a lower proportion than in 2015 (76%);
- A quarter of electricians hold other types of skill cards/certificates (27%).



Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 31 summarises the types of cards held by workers, with the CSR card colours split into sub-levels.

Overall 7% of CSCS and 8% of CSR card holders have Red cards; a third of CSCS (33%) and a slightly lower proportion of CSR card holders (29%) have Green cards; and just over a quarter of CSCS card holders (29%) and just under a quarter of CSR card holders (25%) have Blue cards. One in six CSCS card holders have Gold cards (17%), compared with just over one in four CSR card holders (27%).

Analysis by region/nation reveals that workers with a CSCS card based in Scotland (22%), Wales (19%), the East Midlands (16%) and the North East (15%) are significantly more likely than those in other regions/nations to hold an advanced Gold coloured card. This compares with just 7% of workers that hold an advanced Gold coloured card in London, the South East, South West and the West Midlands. Workers in Yorkshire and the Humber are significantly more likely than average to hold Blue cards (34% of those with a CSCS card).

Of those holding CSR cards, workers in Northern Ireland are more likely than those elsewhere to hold Green cards (37%), whilst workers based in London are more likely than average to hold Gold – Craft/Supervisor cards (55%).

As one would expect, younger workers are more likely to hold Red Trainee cards (34% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue or Black cards (35% and 12% of 45+ year olds). Workers currently employed by an agency are significantly more likely to hold Green cards (75%), compared with those employed directly (28%) or self-employed (33%).



Figure 31: Colour of CSCS/CSR cards held

Base: Where CSCS or CSR cards are held

	2018/19 CSCS %	2015 CSCS %		2018/19 CSR %	2015 CSR %
Red - Trainee	4	5	Red - Apprenticeship/Trainee	5	7
Red - Experienced worker card	3	2	Red - Trained Plant Operator	1	2
			Red - Trainee Supervisor/Manager for undergraduates/ recent graduates	2	1
Green - construction site operative card for general site workers	33	35	Green - Construction Operative (for general site workers)	29	29
Blue - skilled	29	27	Blue - Operative/ Craft	20	11
			Blue - Plant Operator	5	7
			Blue - Basic Scaffolder	*	4
Gold – advanced craft/skilled worker	11	18	Gold - Craft/Supervisor Card	26	29
Gold – supervisor card	6		Gold - Advanced Scaffolder	1	1
			Platinum - Manager Card	2	2
Black - manager card	6	5	Black - Senior Managers Card	3	1
Academically Qualified Persons Card	3				
Professionally Qualified Persons Card	1				
Provisional Card (Requires Operatives HSE test within 2 years)	<0.5%				
Construction Site Visitor Card (HSE operatives test within 2 years)	<0.5%				
Apprentice Card	1				
Other	2	2	Other Professional cards, visitor cards, temporary cards	4	5
Unsure	2	4	Unsure	3	2
<i>Unweighted bases</i>	<i>3398</i>	<i>3975</i>		<i>176</i>	<i>220</i>

Q13/Q14



Card colours also vary significantly according to current occupation/trade, as Figure 32 summarises. Some significant differences include that labourers/general operatives are most likely to hold Green cards (76%); roofers are most likely to hold Blue cards (88%), followed by plant/machine operatives (63%) and plasterers (54%). Electricians (37%), followed by carpenters/joiners (26%) and bricklayers (23%) are most likely to hold Gold cards. Site managers are most likely to hold Black cards (35%).

Figure 32: Colour of CSCS card held, by current occupation

Base: All respondents

	Unweighted bases	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold: Advanced craft/skilled worker card %	Gold: Supervisors card %	Black %
Bricklayer	458	4	2	21	42	23	5	1
Carpenter/joiner	391	4	3	15	41	26	6	1
Dryliner	108	7	4	32	49	1	0	1
Electrician	146	5	0	19	7	37	14	2
Labourer/general operative	641	3	3	76	13	1	1	*
Painter/decorator	83	3	2	29	43	11	6	0
Pipe fitter	58	4	3	32	27	16	10	0
Plant/machine operative	151	2	4	25	63	2	0	0
Plasterer	44	2	3	27	54	3	0	0
Plumber	144	8	3	20	28	21	7	1
Roofer	81	1	0	39	88	2	3	0
Scaffolder	100	5	7	24	45	6	5	0
Site manager	346	4	4	10	8	7	14	35
Technical	145	8	2	18	8	3	9	12
Other	24	0	0	42	24	0	15	0

*Denotes less than 0.5%

Q13

Construction qualifications held

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

Overall, nearly three-quarters of all construction workers say they had no formal qualifications when they first started working in the construction industry (72% cf. 75% in 2015) and the proportion is higher amongst older workers (76% of 45+ year olds cf. 68% of 16-24 year olds). By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst roofers (88%), plasterers (87%), scaffolders (84%), dryliners (83%) and labourers/general operatives (83%), whilst those in technical job



roles (56%), site managers (60%), bricklayers (64%), carpenters/joiners (64%) and plumbers (64%) are least likely to have started with no formal qualifications.

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

Overall, nearly three-quarters of all construction workers providing a response reported holding some sort of construction related qualification at the time of interview (72%), which is a higher proportion than that reported in 2015 (67%). As Figure 33 summarises, the proportion of workers that hold any qualifications is lowest amongst the youngest workers (52% of those aged 16 to 19).

The proportion that hold a qualification increases with the length of time in construction, from 34% of those that have worked in construction for less than a year, 51% of those that have worked in construction 1 to 2 years, 63% of those that have worked in the sector for 2 to 5 years, and 79% of those that have done so for 5 or more years.

Figure 33: Proportion of workers that hold any construction-specific qualification
Base: All respondents

		2018/19	2015
		%	%
Total - UK (4048)		72	67
Age	16 to 19 years (219)	52	65
	20 to 24 years (484)	63	64
	25 to 44 years (2009)	74	69
	45+ years (1312)	76	68
Ethnicity	White (3834)	72	69
	BME (200)	72	57
Length of time in construction	<1 year (227)	34	38
	1 to 2 years (212)	52	55
	2 to 5 years (632)	63	59
	5+ years (2942)	79	73
Current contract type	Employed directly (2090)	75	70
	Self-employed (1671)	73	67
	Agency (270)	49	54
Location where living just before they started working in construction in the UK	UK/ROI national (3969)	72	74
	Migrant worker (79)	73	49
<i>Unweighted bases for 2018/19 in parentheses</i>			

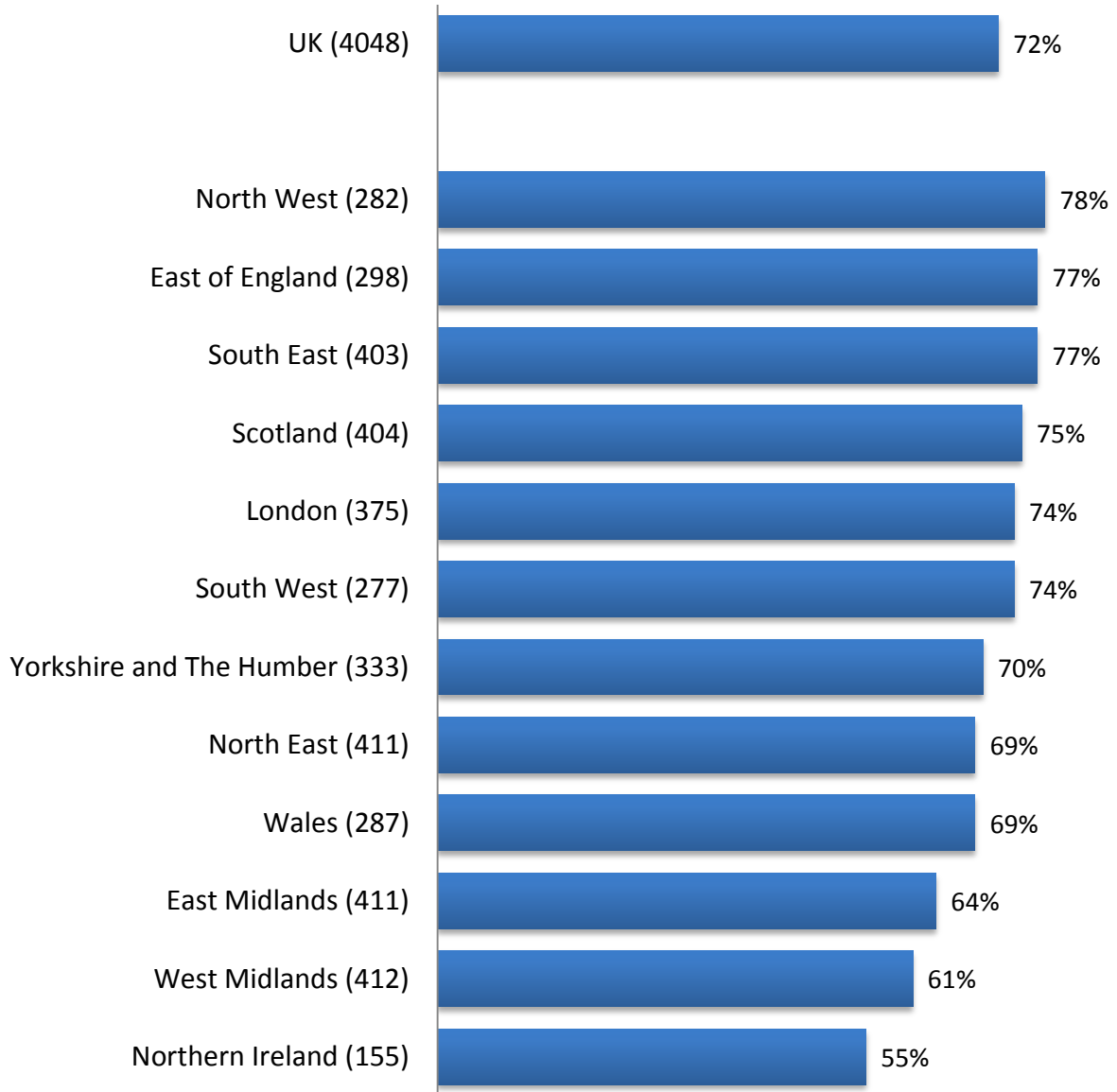
Q15/Q16



There is a considerable variation in the proportion of workers that hold qualifications by region/nation; varying from more than three-quarters of construction workers in the North West (78%), down to around three-fifths within the West Midlands (61%) and fewest in Northern Ireland (55%).

Figure 34: Proportion of workers that hold any construction-specific qualification, by region/nation

Base: All respondents



Unweighted bases in parentheses Q15/Q16



The likelihood that workers hold any qualifications also varies significantly by current job role. Site managers (90%) and plumbers (86%) are most likely to hold qualifications, followed by carpenters/joiners (84%) and electricians (83%). Trades least likely to hold formal qualifications include those working as labourers/general operatives (38%), dryliners (61%), plasterers (65%), and pipe fitters (67%).

Compared with 2015, fewer scaffolders, plasterers and labourers/general operatives hold any qualifications, while the proportions of carpenters/joiners, plant/machine operatives, bricklayers, roofers and painters/decorators that have cards has increased. Figure 35 summarises these findings.

Figure 35: Proportion of workers that hold any construction-specific qualification, by current occupation

Base: All respondents

HIGHER likelihood	2018/19	2015	LOWER likelihood	2018/19	2015
	%	%		%	%
Site manager (383)	90	86	Roofer (82)	69	52
Plumber (156)	86	84	Painter/decorator (95)	69	60
Carpenter/Joiner (429)	84	78	Pipe fitter (62)	67	-
Electrician (227)	83	83	Plasterer (51)	65	69
Plant/machine operative (315)	82	66	Dryliner (112)	61	63
Bricklayer (514)	81	73	Labourer/Gen. Op. (707)	38	43
Technical (171)	80	-			
Scaffolder (166)	79	82			
<i>Unweighted bases for 2018/19 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 36 summarises the types of qualifications that workers hold and compares the figures to the 2015 survey (amongst those who have any qualifications and who provided a response).

As in 2015, the qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (58% cf. 66% in 2015). One in seven construction workers with qualifications hold City & Guilds qualifications (14% cf. 20% in 2015), whilst 1 in 20 construction workers with qualifications now hold an apprenticeship (6% cf. 13% in 2015). There were a higher proportion of construction workers with other qualifications in 2018/19 compared with 2015.

Figure 36: Main type of qualification held

Base: Workers with qualifications (valid responses)

	2018/19 %	2015 %
NVQ/SVQ	58	66
City & Guilds	14	20
Apprenticeship	6	13
HNC/HND/BTEC Higher	6	4
Degree	7	4
Other	24	11
<i>Unweighted bases</i>	2122	2455

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. As in 2012 and 2015, the survey therefore asked all workers whether or not they perceive the need for training in any basic skills to help with their work.

Overall, 1 in 9 construction workers believe they would benefit from some form of training in basic skills (11%), compared with a higher proportion of 1 in 7 in 2015 (14%) and 1 in 5 in 2012 (20%). In terms of the type of training required there is an almost even split across reading, writing, speaking English, and Maths, as Figure 37 summarises.

Figure 37: Self-assessed need for training in basic skills

Base: All respondents

	2018/19 %	2015 %	2012 %
ANY	11	14	20
Reading	5	6	9
Writing	5	6	9
Speaking English	6	7	8
Maths	5	6	10
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>	<i>4933</i>

Q37

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

- Workers based in London (19%) and in particular with speaking English (14%);
- Younger workers aged 16-24 (14% cf. 6% aged 45+);
- BME workers (19%) and White Other workers (34%), compared with 6% of White British workers;
- Those who have worked in the industry for less than a year (24%);
- Dryliners (18%) and pipe fitters (22%); and, in particular, with speaking English (11% and 16% respectively) and writing English (10% and 12% respectively);
- Migrant workers (41%); and, in particular, with speaking English (36%).



Current study for additional construction qualifications

Overall, 15% of all construction workers are currently working towards any formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 12% in 2015 and 11% in 2012.

As in previous surveys, the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (55% of 16 to 19 year olds; 24% of 20 to 24 year olds) and amongst those who have worked within the construction industry for less than 5 years (38%, less than 1 year; 31%, 1 to 2 years; 25%, 2 to 5 years). Workers employed directly (20%) are also more likely than those who are self-employed (9%) or working for an agency (11%) to be currently working towards a qualification.

By qualification level, workers currently qualified to Level 1 are most likely to be working towards qualifications (27%) and those at Level 2 are least likely (12%). Of those who have no qualifications currently 1 in 6 are working towards one (16%).

Figure 38 summarises these findings.

Figure 38: Proportion working towards additional construction qualifications
Base: All respondents

		2018/19 %	2015 %	2012 %
	Total (4048)	15	12	11
Age	16 to 19 years (219)	55	57	56
	20 to 24 years (484)	24	23	20
	25 to 44 years (2009)	14	10	7
	45+ years (1312)	6	4	
Length of time in construction	<1 year (257)	38	31	26
	1 to 2 years (212)	31	28	35
	2 to 5 years (632)	25	23	21
	5+ years (2942)	9	7	8
Contract type	Employed directly (2090)	20	16	14
	Self-employed (1671)	9	8	N/A
	Agency (270)	11	10	N/A
Highest qualification level	None (1191)	16	11	N/A
	Level 1 (105)	27	32	N/A
	Level 2 (920)	12	15	N/A
	Level 3 (666)	14	8	N/A
	Level 4+ (153)	21	15	N/A
<i>Unweighted bases for 2018/19 in parentheses</i>				

Q18

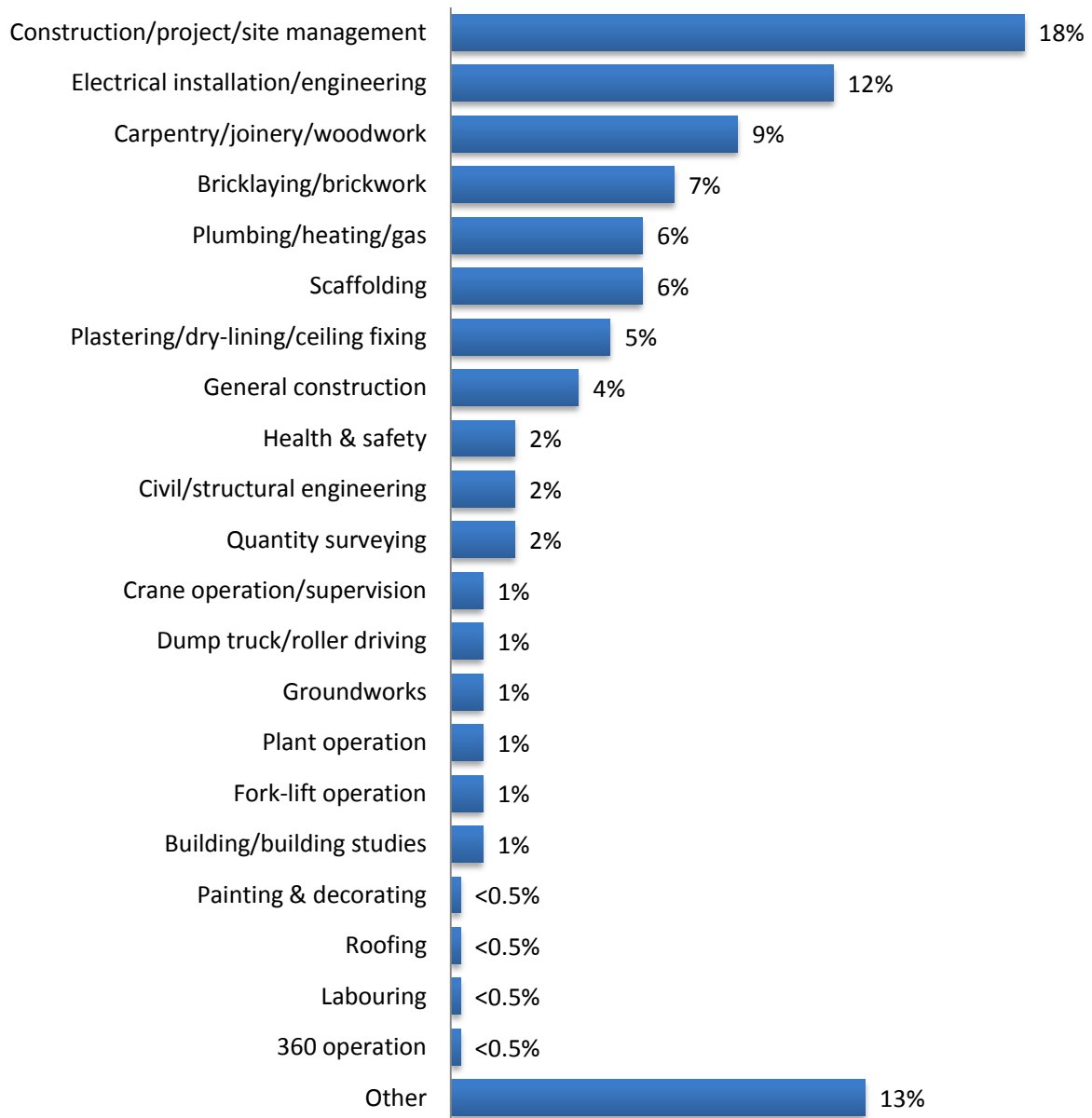


Variances are also evident by current job role, with those in technical roles (28%), site managers (27%), and electricians (27%) most likely to be working towards qualifications currently, and labourers/general operatives (5%) and painter/decorators (5%) least likely.

Of those who are currently studying for a qualification (and who provided a response) the most popular type of qualification is an NVQ/SVQ (50%). In terms of the subject of the qualifications being worked towards, construction/project/site management (18%), followed by electrical installation/engineering (12%) are most popular, as Figure 39 illustrates.

Figure 39: Subject of qualification being worked towards

Base: Where working towards a qualification



Unweighted base = 562 Q19



Supervisory and managerial qualifications and training

As reported earlier, 3 in 10 construction workers perform a supervisory or management role at their site (30%). Amongst those who do not currently perform supervisory/management roles, a quarter want to become a supervisor or manager in the future but have not done it before (24% cf. 20% in 2015) and a further 6% (as in 2015) want to be a supervisor/manager and have done it before. A fifth of all construction workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (20%), while half are certain that they do not want to be (51%).

Amongst the youngest workers, aged 16 to 24, the proportion that would like to be supervisors/managers is highest, at over a third (36%), while amongst those aged 45 and over a significantly higher proportion of workers definitely do not want to be supervisors/managers (73%). The likelihood that workers want to be supervisors/managers also lessens amongst those that have worked in the industry for at least 5 years (58% definitely do not want to be) and still further amongst those that have worked in the industry for more than 20 years (73% definitely do not).

Figure 40: 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 %
2018/19 Total (2824)		24	6	51	20
Age	16 to 19 years (208)	35	1	31	33
	20 to 24 years (419)	33	3	36	28
	25 to 44 years (1355)	28	6	45	21
	45+ years (826)	7	8	73	12
Ethnicity	White (2673)	23	6	51	20
	BME (141)	40	4	38	18
Length of time inc construction	<1 year (241)	35	*	40	24
	1 to 2 years (180)	30	1	45	24
	2 to 5 years (536)	35	3	34	28
	5+ years (1864)	18	8	58	17
Contract type	Employed directly (1313)	24	4	50	22
	Self-employed (1268)	22	7	52	18
	Agency (233)	27	4	44	25
Highest qualification level	No qualifications (1022)	23	3	54	20
	Level 1 (95)	31	2	39	29
	Level 2 (703)	26	6	46	22
	Level 3 (441)	25	9	48	18
	Level 4+ (27)	22	17	39	23
<i>Unweighted bases in parentheses</i>					

Q9



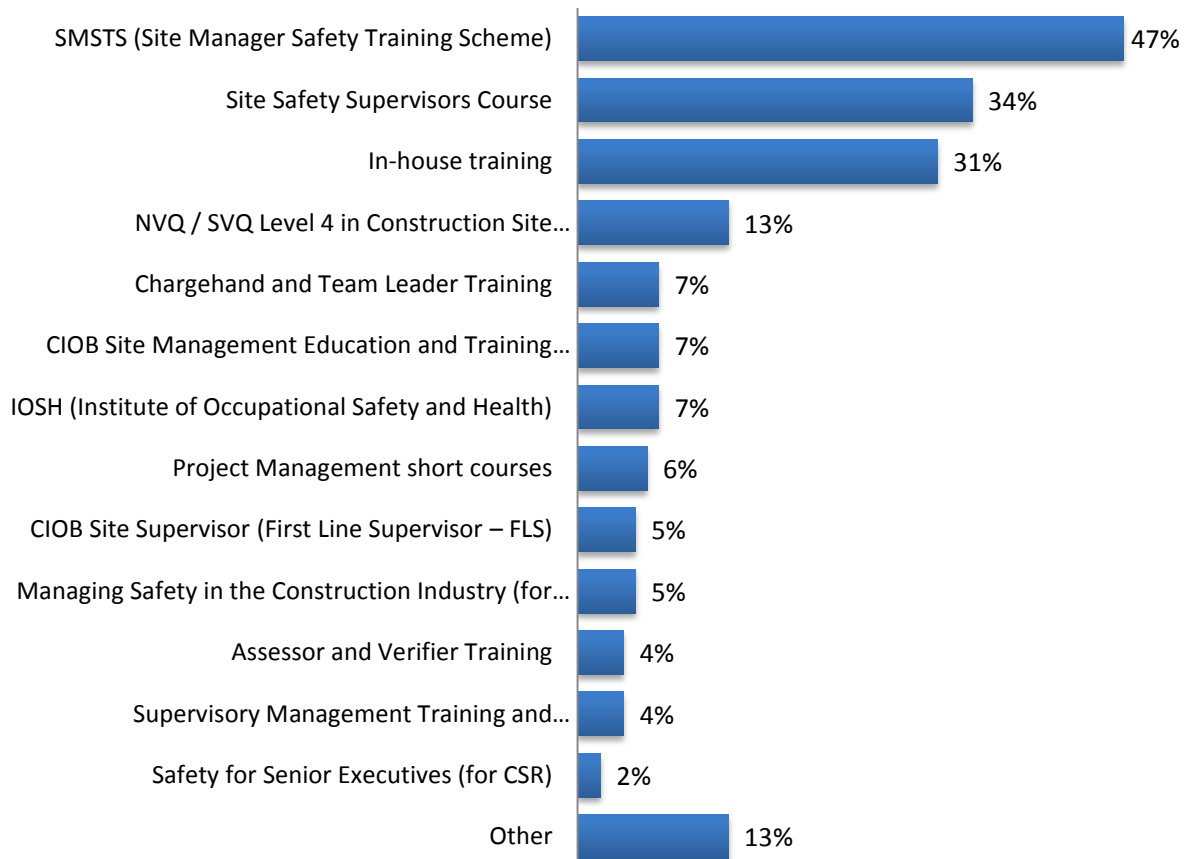
Within job roles, plasterers (67%) and painters/decorators (66%) are most likely to say that they do not want to be supervisors/managers.

A third of all respondents (34% cf. 25% in 2015) and four-fifths of those who have had some form of supervisory or management responsibilities (81% cf. 73% in 2015 and 71% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.

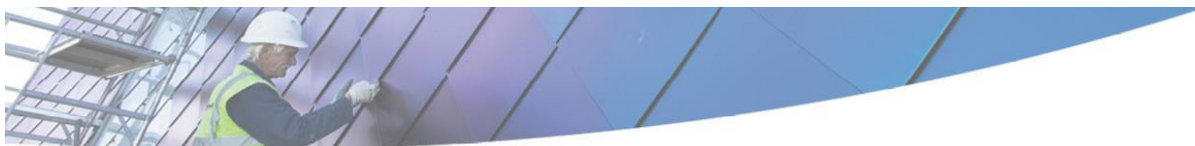
The proportion that have undertaken any managerial or supervisory training increases to just over two-fifths of construction workers aged 45 and over (42%) and amongst those with 5 or more years' experience of working in the construction sector (41%). Virtually all site managers have received formal training designed to improve managerial or supervisory knowledge or skills (96%). In terms of the types of supervisory/managerial training undertaken, the proportions mentioning each type are summarised in Figure 41. SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned by those who have undertaken any training (47%), followed by Site Safety Supervisors Courses (34%) and in-house training (31%). These were also the top three most mentioned types of supervisory training in 2015, as well as 2012.

Figure 41: Types of managerial/supervisory training undertaken

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



Unweighted base = 1254 Q11



Overall skill levels

An overview of the qualification and skill levels of construction workers surveyed has been derived by combining data from various separate measures and is presented in Figure 42 below.

As in 2015, the vast majority of construction workers (99%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

Just over a fifth of the workforce (22%) holds a skill card/certificate, but has no other construction qualification, which is a lower proportion than in 2015 (30%).

The proportion of construction workers that are working towards a construction qualification in 2018/19 is greater than that reported previously (15% cf. 12% in 2015 and 11% in 2012).

Figure 42: Qualification status summary

Base: All respondents

	2018/19 %	2015 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	99	98
Holds a formal construction qualification or a skills card/certificate	98	97
Holds a skills card/certificate	97	96
Holds a skills card/certification but no other qualification	22	30
Working towards a qualification	15	12
None of the above	1	2
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>

Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level, although 26% of all workers did not provide sufficient information to enable a level of qualification to be calculated. Figure 44 summarises construction workers' highest level of qualification, overall and by occupation, based on where a level could be calculated.

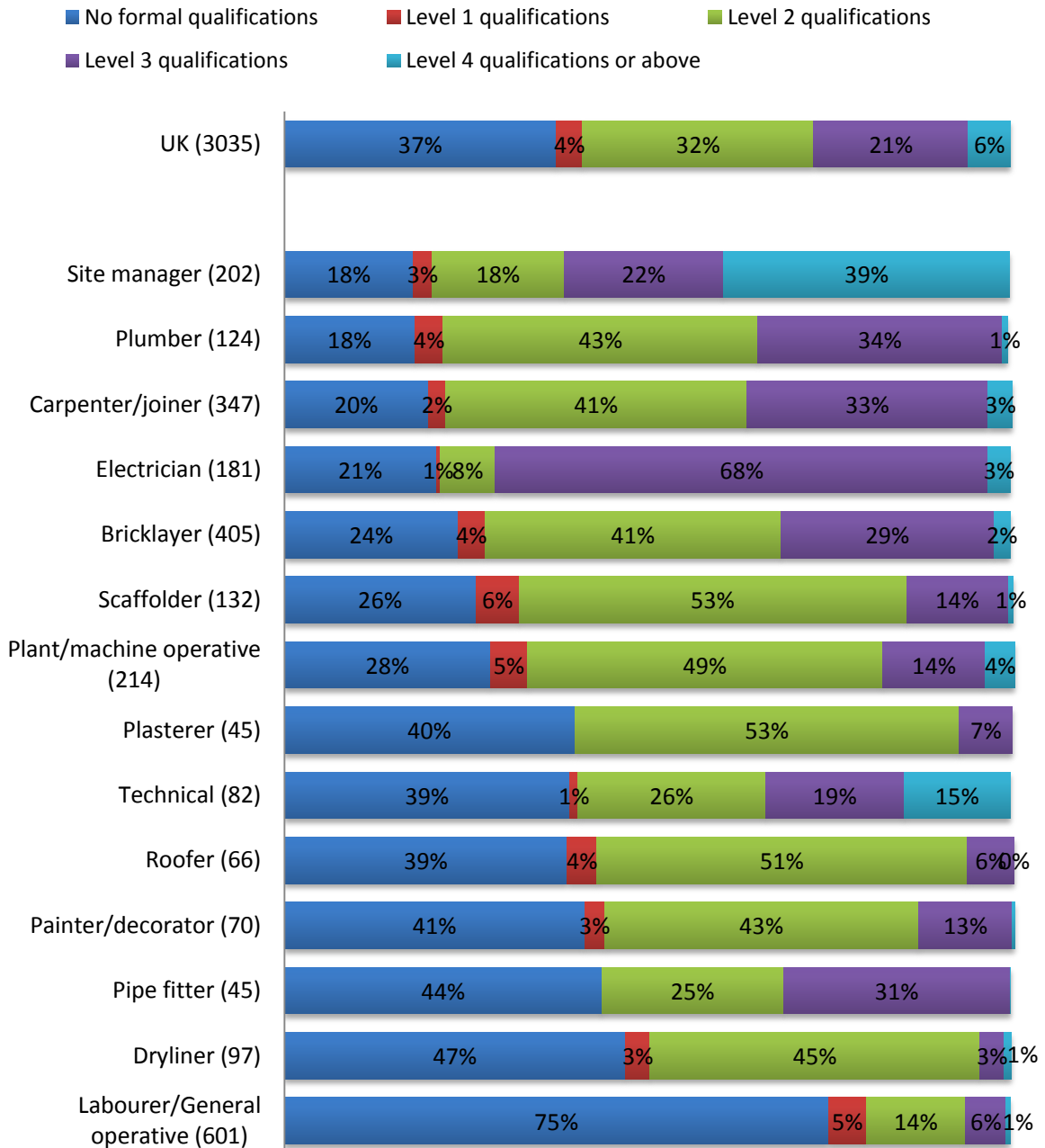
Overall, around three-fifths of those providing a response have qualifications equivalent to Level 2 or above (59% cf. 58% in 2015).



By occupation, again based on where a response was provided, site managers are most likely to hold the highest level of qualifications; two-fifths hold qualifications at Level 4 or above (39%) and around a quarter have Level 3 qualifications (23%). Electricians and plumbers are also more likely than other occupations to hold qualifications equivalent to Level 3 or above (71% and 35% respectively).

Figure 43: Current qualification level, by occupation

Base: All respondents who provided a valid response



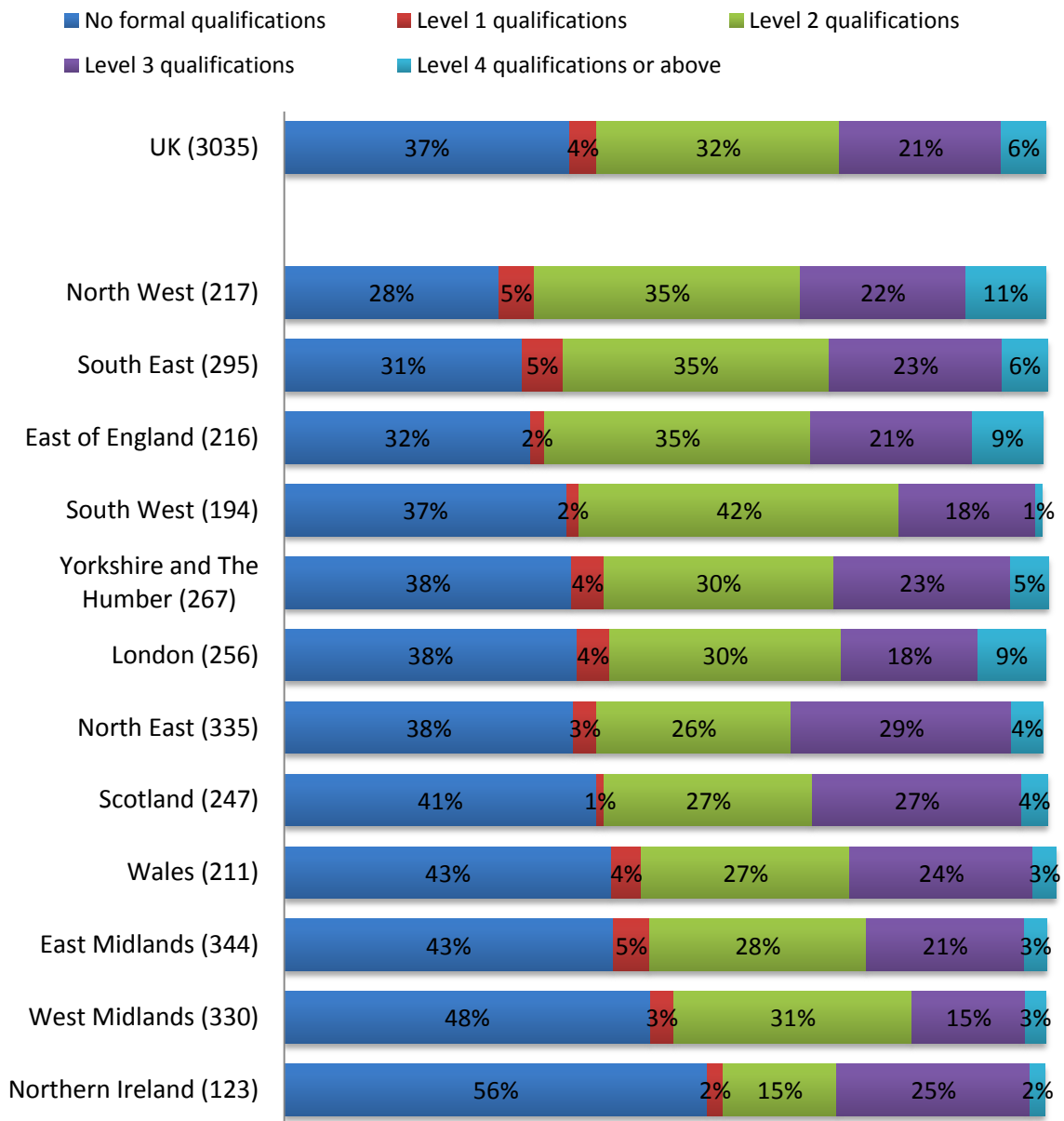
Unweighted bases in parentheses
Q15/Q16



Analysis by region/nation reveals that while the proportions that hold qualifications at Level 1 or at Level 4 and above are generally quite similar, the proportions that have Level 2 or 3 qualifications and no qualifications varies quite considerably. In the South West, for example, three-fifths of construction workers that provided a response are qualified to Level 2 or Level 3 (61%), compared with two-fifths of construction workers in Northern Ireland (39%). These variances are summarised in Figure 44.

Figure 44: Current qualification level, by region/nation

Base: All respondents who provided a valid response



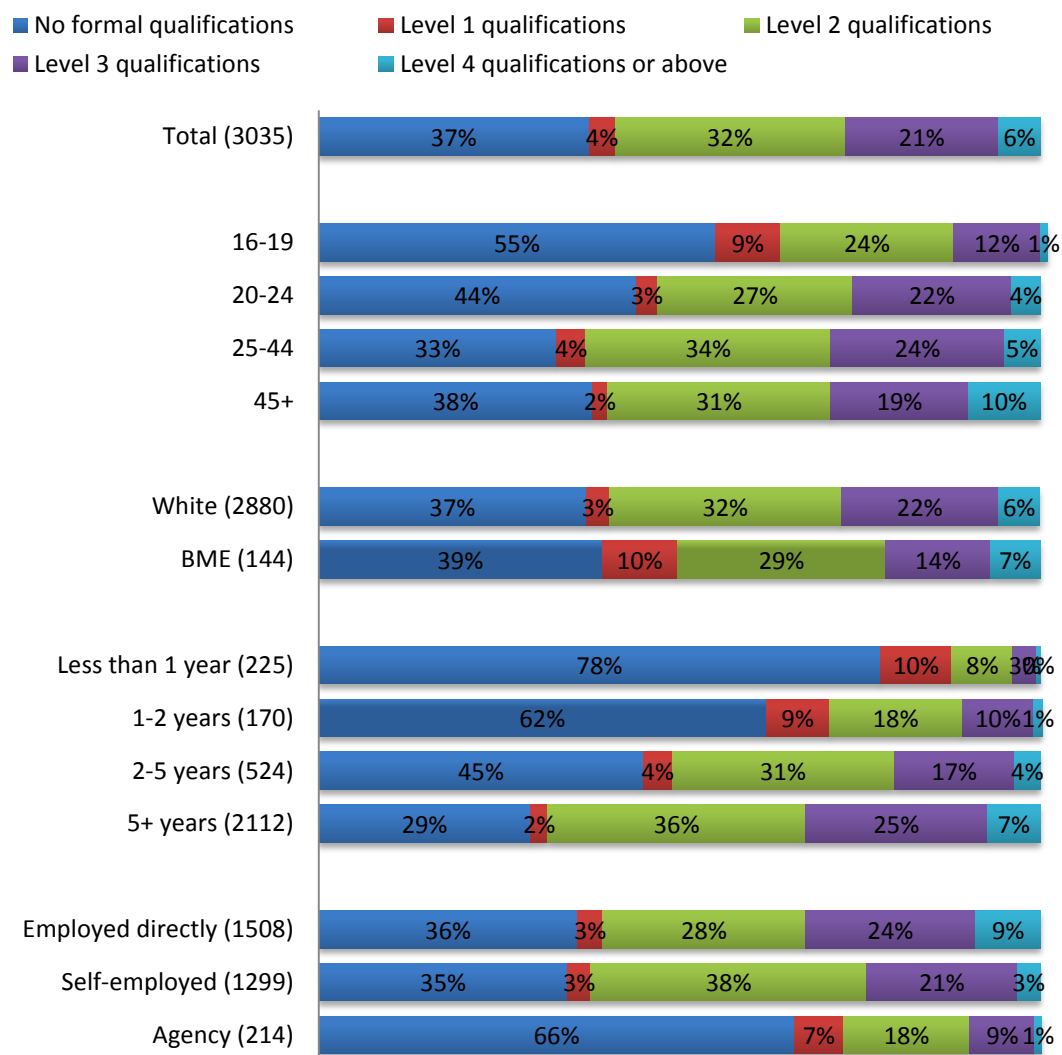
Unweighted bases in parentheses Q15/Q16



Looking at other sub-groups of construction workers (where provided a response), younger workers are least likely to have qualifications and most likely to have Level 1 qualifications (8% of 16-19 year olds have a Level 1). Workers that have worked in the construction industry for longer are more likely to have Level 2+ qualifications with a third of those that have worked in the industry for 5 or more years having Level 3+ qualifications (32%). In terms of contract type, as already mentioned, workers who are currently working for an agency are less likely than those employed directly or self-employed to have any qualifications and less likely to have Level 2+ qualifications (27%, compared with 61% and 62% respectively). In addition, workers employed directly by a company are more likely to have higher level qualifications compared with workers who are self-employed; a third of workers employed directly have qualifications equivalent to Level 3 or above (33%), compared with a quarter of self-employed construction workers (24%). BME workers are less likely than those of White ethnic origins to have qualifications at Level 2+ (50%, compared with 60%). Figure 45 illustrates these variances.

Figure 45: Current qualification level, by other key variables

Base: All respondents who provided a valid response



Unweighted bases in parentheses Q15/Q16



Geographic mobility

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

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



Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. This question was asked in 2015 and also in 2012, when the code frame used for the responses was slightly different.

While, in 2012 and 2015, the most likely reason for working in their current region/nation was because they grew up there/have always lived there, in 2018/19, the most common reason was that their employer sent them to that location (51%). It has become a more significant reason for choosing to work in an area in the last 3 to 4 years (36% in 2015 and 40% in 2012). Having grown up there/always lived there was the second most frequently cited reason for working in the area (43%). Other reasons to do with family were mentioned by 5% of workers.

Figure 46: Reasons for choosing to work in current location – prompted, multiple response

Base: All respondents

	2018/19 %	2015 %		2012 %
Employer sent you here	51	36	Employer sent me	40
You grew up here/have always lived here	43	55	Family	42
Family reasons	5	6		
There are more jobs available in this area	5	6	More jobs here	12
Came to the area to take up this or another job	3	5	More regular opportunities	10
Construction work is better paid in this area	3	3	Better paid jobs	5
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	2	1	Prefer living here	10
Better promotional prospects in this area	1	1	More chance of promotion	1
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>		<i>4933</i>

Q28

Across the different age groups there is a similar balance between the two main reasons for current location of being sent there by employers and having grown up there/always lived there. Workers aged 25 to 44 are less likely than younger and older workers to cite having always lived in an area (40% cf. 49% of 16 to 19 year olds and 45% of 45+ year olds). The proportions reporting that their employer sent them there ranges between 49% and 51% across all age groups.

There are significant differences by ethnicity, with 73% of Asian construction workers reporting that their employer sent them to the current location, compared with 50% of those of White ethnicity. White British construction workers are more likely to work in an area because they have always lived there than are BME construction workers (49% cf. 31%).

Naturally, those who are directly employed are more likely than self-employed and agency workers to report that their employer sent them to the location (57% cf. 46% and 38% respectively). Agency workers are more likely than average to cite other family reasons (10%)

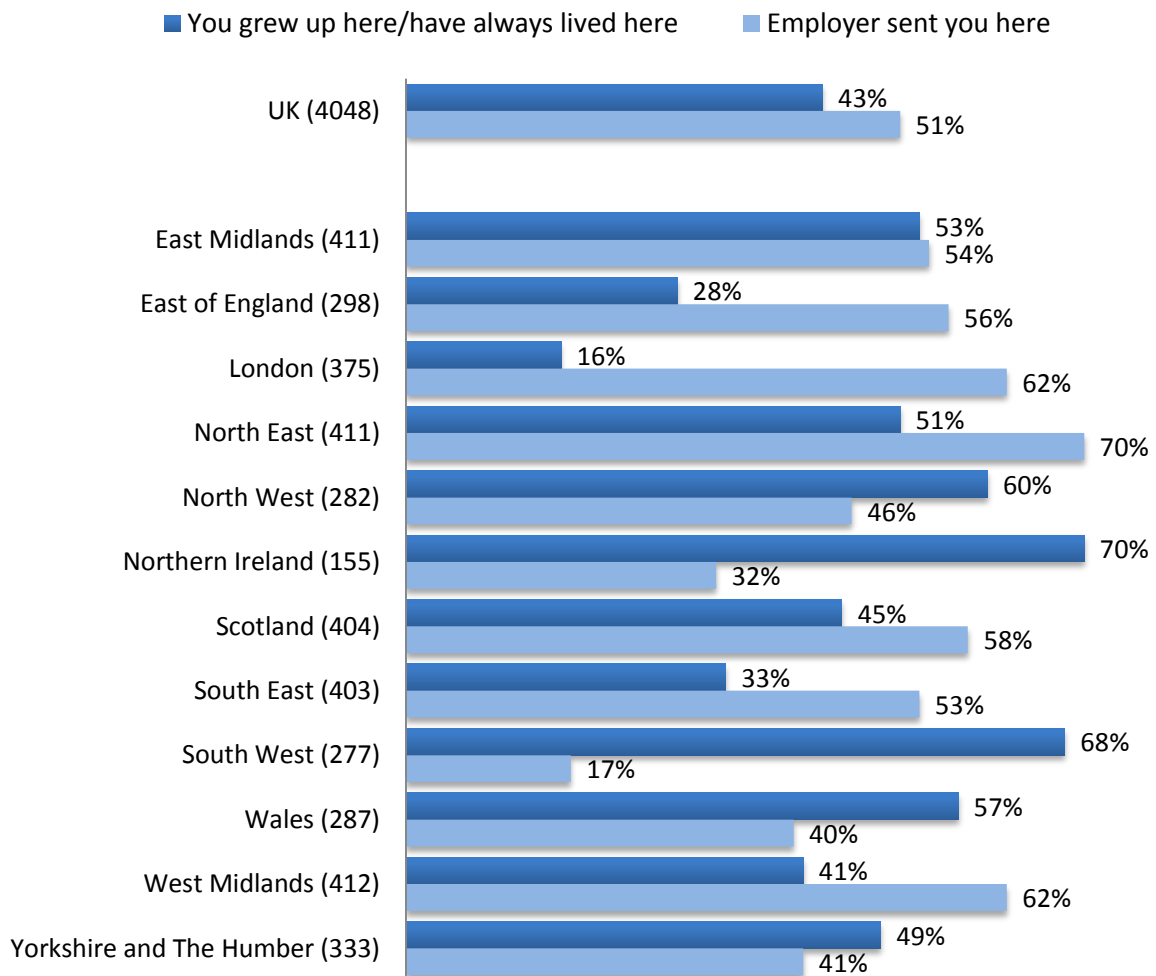


and both the self-employed and agency workers are more likely to cite the availability of jobs in the area as the reason for locating there (7% and 9% respectively cf. 3% of those directly employed).

There are also significant differences by region/nation in the proportions that give these two main reasons for working in their current location. Workers in Northern Ireland and the South West are most likely to say they work in their current region/nation because they have always lived there/grew up there (70% and 68% respectively), compared with just 16% of those based in London, 28% of those based in the East of England, and 33% of those based in the South East. Seven in ten workers located in the North East (70%) and three in five workers located in London and the West Midlands (both 62%) say their employer sent them here, compared with just 17% in the South West. These differences are summarised in the following figure.

Figure 47: Top two reasons for deciding to work in their current region/nation, by region/nation

Base: All respondents



Unweighted bases in parentheses Q28

Just over two-fifths of all construction workers have worked within their current region for their entire construction career (44%), which is the same proportion as in 2015. A further third of workers (33%) have remained in this region/nation most of the time, which is a lower



proportion than in 2015 (36%). Overall, the majority of construction workers have remained in the current region/nation for all or most of their careers in construction (77% cf. 80% in 2015).

Figure 48: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	2018/19 %	2015 %	2012 %
All of your time	44	44	33
Most of it	33	36	36
Around half your time	9	8	12
A small proportion of your time	10	7	14
Only on this job (this is the first site you've been to in this region/nation)	2	3	3
Don't know	1	2	2
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>	<i>4933</i>

Q26/Q27

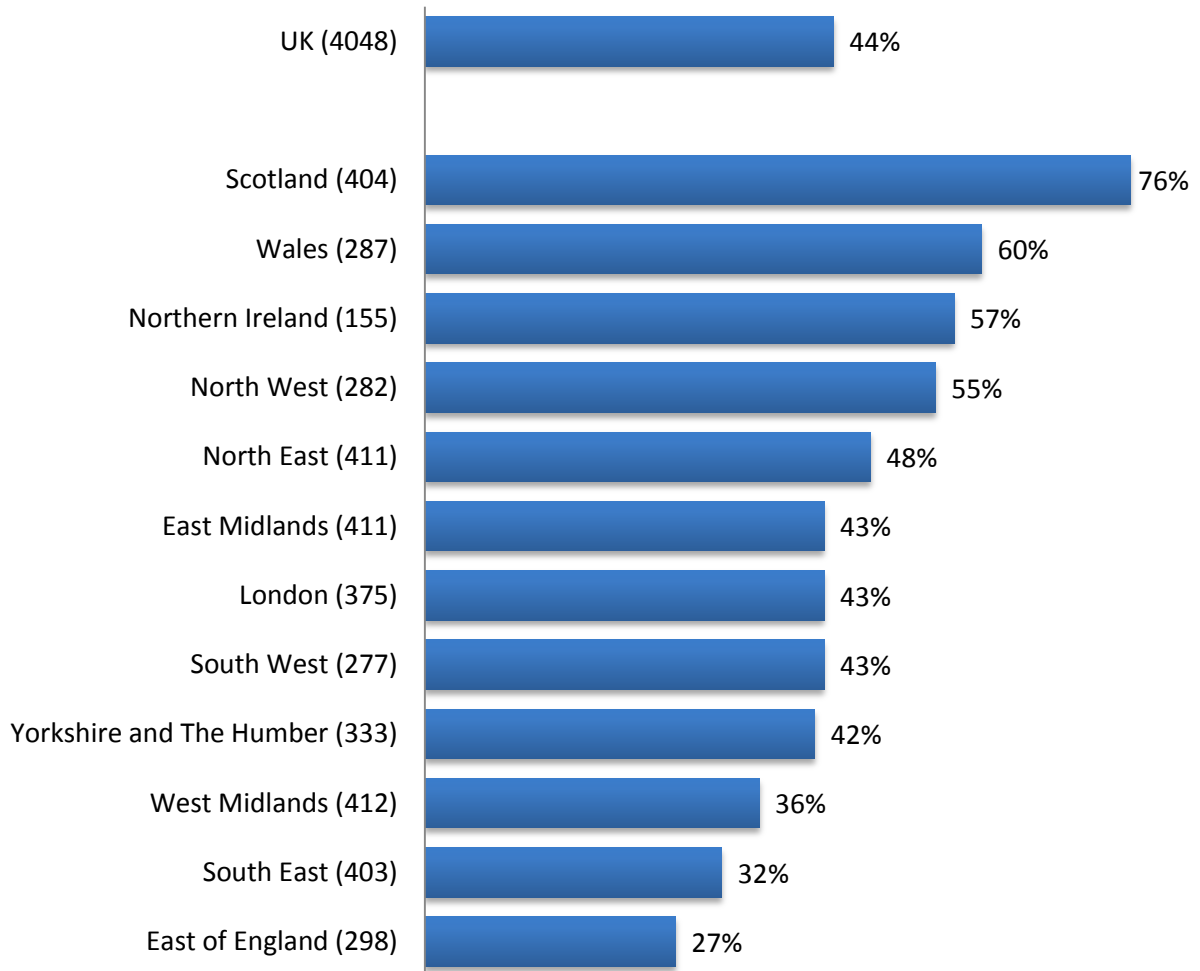
The proportion of workers that have spent all of their time in the current region/nation is higher amongst younger workers (83% of 16 to 19 year olds and 80% of 20 to 24 year olds) and similarly high amongst those that have worked in the construction industry for the shortest period of time (62% of those in construction for less than 1 year).



There are also some quite significant variations again by region/nation, with those based in Scotland (76%) and Wales (60%) most likely to say they have spent all their time in this current region/nation and those based in the East of England (27%) and South East (32%) least likely.

Figure 49: Proportion of workers that have spent all their time in this current region/nation

Base: All respondents



Unweighted bases in parentheses Q26/Q27



In terms of the regions/nations in which workers' current employers operate, most workers reported that their employer operates on a national basis (i.e. UK-wide), but this is least likely to be the case for workers currently working in Northern Ireland (25%), while fewer than half of workers in the South West (37%), the East Midlands (42%) and Wales (45%) reported that their employer operates nationally. Workers in Scotland (76%) and London (74%) are most likely to report this to be the case. Within Northern Ireland, the lower propensity for employers to operate on a UK-wide basis is likely to reflect the fact that Northern Ireland is physically separated from England, Scotland, and Wales by the Irish Sea.

Most of the remainder reported that their employer operates out of the region/nation they are currently working in (as shown in Figure 50). One in four workers in Northern Ireland reported their employer operates in other parts of Europe (25%); this is most probably the Republic of Ireland.

Figure 50: Region/nation employer operates in, compared with region/nation working in currently

Base: All respondents *denotes less than 0.5%

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

Q25



Region/nation worked in before current site

Thinking about the last construction site they worked on before this one, in the majority of cases, workers' last sites 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 51 illustrates. Workers in Scotland (98%), followed by those in Northern Ireland (93%), the North West (91%) and the North East (90%) are most likely to state that their last site was in the same region/nation as they are working in now, whilst construction workers in the East of England (52%) and the South East (62%) are least likely to have worked in the same region/nation. Nearly a third of workers now based in the East of England had previously been based in London (31%), as had one in seven workers now on sites in the South East (14%). One in six workers in London had previously been based in the South East (16%) and one in six workers in the West Midlands had previously been based in the East Midlands (16%).

Figure 51: Region/nation of last site before this current one

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

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

Q32



Worker origins

Workers were asked which region/nation they were living in just before they got their first job in construction in the UK. Overall, nearly three-quarters of all construction workers were interviewed in the same region/nation in which they were living when they started their construction career (72% cf. 75% in 2015 and 66% in 2012).

There are, however, considerable variations in the extent to which workers have remained in their original locality. Workers currently based in Scotland (96%), Northern Ireland (95%), Wales (93%) and the North East (93%) are most likely to have remained in the same region/nation in which they were based when they started their construction careers, whilst workers now based in the East of England are least likely to have been living there when they started their careers (44%). A quarter of workers now based in the East of England (26%) lived in London when they began their construction careers, while 8% of workers now working in London originated from outside of the UK (including the Republic of Ireland).

Figure 52: Inter-regional/national movement at the beginning of construction careers

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

Q40



Thinking next about where workers studied for their first construction qualification, Figure 53 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that once again there are great variations by region/nation, with the highest proportions in Scotland (96%) and Northern Ireland (93%) and the lowest in the South East (41%) and East of England (47%). Of those now based in the South East and East of England, the highest proportions who did not study/train there did their training in London (16% and 24% respectively). Whereas of those now based in London but did not study/train there, the highest proportion were based in the South East when they did their first construction qualification (16%).

Figure 53: Proportion of construction workers based in the same region/nation as when their first qualification was achieved

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

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

Q17



Travel to site

Relative locations of current workplace to home

The majority of construction workers were interviewed on a site that was located within the same region/nation as their permanent home, but there was some variation as to whether this was the case by region/nation.

As in 2015 (and 2012), the South East ‘imports’ the greatest proportion of construction workers (45%). The East of England is the second largest ‘importer’ of construction workers (40%) but imports the majority of its workers from neighbouring regions/nations (36% from the South East, London and East Midlands). Compared with 2015, London appears to have increased its level of ‘imported’ construction workers, with over one third (37%) having their permanent residence in a different region or nation (29% in 2015). Another relatively high ‘importer’ is the West Midlands (20%).

Northern Ireland, Scotland and Wales are all low importers of skills (no more than 2%). The East Midlands imports far fewer workers now than in 2015 (10% cf. 26%).

With the exception of the South East, regions/nations predominantly import workers from neighbouring regions/nations.

Figure 54: Inter-regional/national movement from permanent residence to current site
Base: All respondents who provided a valid response

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

Unweighted bases for 2018/19 in parentheses

Q52/Q54



The detailed breakdown of workers' home regions/nations in relation to where their current work site is located is provided in Figure 55.

Figure 55: Region/nation of current site in relation to current residence

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

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

Q52/Q54

Furthest distance worked in last 12 months

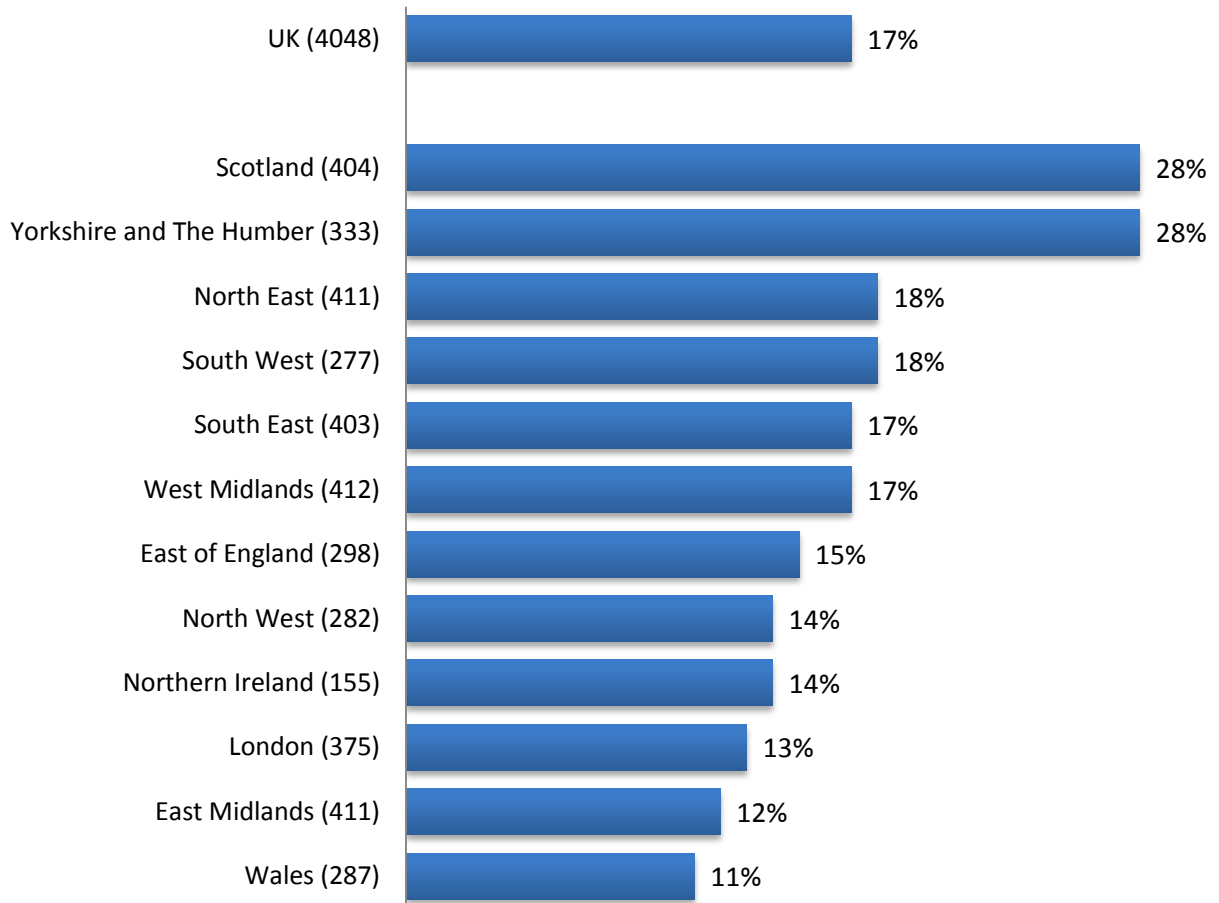
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. A quarter of all construction workers have worked no more than 20 miles away (26% cf. 20% in 2015) and around a further third have worked between 21 and 50 miles away (32% cf. 31% in 2015). This leaves around two-fifths that have worked more than 50 miles away from their permanent or current home (41% cf. 47% in 2015); including a quarter that have worked between 51 and 100 miles away (24% cf. 26% in 2015) and a sixth that have worked more than 100 miles away (17% cf. 21% in 2015).



Once again there are variations in this regard, with workers based in Scotland (28%) and Yorkshire and the Humber (28%) most likely to have travelled more than 100 miles from their permanent home to work in the last 12 months.

Figure 56: Proportion of workers that have travelled more than 100 miles from their permanent home to work, in the last 12 months, by region/nation

Base: All respondents



Unweighted bases in parentheses Q29



Use of temporary accommodation

Nationally, one in twenty construction workers reported that they were currently staying in temporary accommodation while working at their site (5%: similar to the 6% reported in 2015 and 2012). The proportion is highest amongst workers currently based in London (10%) and lowest in the North East (1%).

Figure 57: Percentage of workers in temporary accommodation

Base: All respondents

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

Q41/Q42

By current trade/role, pipe fitters and technical staff are most likely to be living in temporary accommodation (11% in each case). The proportion is also significantly higher amongst those who were living in Northern Ireland before they started working in the construction industry (18%) and amongst migrant workers (17%).

Journey distance to work

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 18 miles which is less than in 2015 (22 miles) and 2012 (28 miles).

Based on those workers that provided an estimate, just over two-fifths (42%) travel less than 10 miles from their current residence to the site they work, whilst 25% travel between 10 and 19 miles and 27% travel between 20 and 49 miles. Only one in twenty (5%) travel between 50 and 99 miles from their residence to work, and only 1% travel further.

Compared with 2015, a higher proportion of workers live within 10 miles of the site at which they work (35% travelled less than 10 miles in 2015).

Those whose site was based in the South West are the least likely to travel long distances to their site and more than three-fifths (63%) travel less than 10 miles (averaging 12 miles).



Those in the South East are the most likely to travel longer distances, with 17% travelling more than 50 miles from their current residence to their site (averaging 27 miles).

Site duration and change

Expected site/phase duration

All the workers who are currently employed on a temporary basis (25% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them. Responses range from 7% that expect to work for another week or two or less; 7% expecting another 2 to 4 weeks; 10% between 1 and 3 months; 10% between 3 and 6 months; 16% between 6 months and a year, and 12% that expect to still be working for them for at least another year. In nearly two-fifths of cases temporary workers did not know how much longer they could expect to be working for their current company/agency (38%).

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. One in seven construction workers do not expect to work on that site for more than a month (14%), which is a slightly higher proportion than in 2015 and 2012 (12% in both years). This includes 4% that only expect to be there for about a week or less. Half of all workers anticipate being on site for more than a month, but less than a year (51%), which is a higher proportion than in 2015 (38%), but closer to the proportion reported in 2012 (42%). One in six expect to stay on that site for a year or longer (18%), which is a lower proportion than in 2015 (26%) and, again, closer to the proportion reported in 2012 (15%). The findings in 2018/19 suggest an increase in medium term stability, but a reduction in longer term positions. Fewer workers in 2018/19 are not sure how much longer they could expect to be on site, indicating less uncertainty than in previous years (16% do not know cf. 24% in 2015 and 20% in 2012).

Figure 58: Length of time workers expect to work at that specific site during current phase

Base: All respondents

	2018/19	2015
	%	%
Less than a week	4	4
1-2 weeks	4	2*
2-3 weeks	3	3*
3-4 weeks	3	3*
1-3 months	12	38
3-6 months	16	
6-12 months	23	
More than a year	18	26
Don't know	16	24
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>

Q24 *wording is different; 'about a week'/'about 2 weeks'/'about 3 weeks'



By region/nation, workers in Scotland are most likely to be unsure of how much longer they will be working at that site (28%), while workers in the East of England (7%) and South East (9%) are least likely to be unsure. The youngest workers, aged 16-19 are also more likely to be unsure of how much longer they can expect to work on their present site (27% don't know).

Amongst the various trades/job roles, site managers (34%) and technical staff (30%) are significantly more likely to indicate that they expect to work at that site for more than a year. This compares with just one in twenty dryliners (6%), pipe fitters (5%), and roofers (7%).

Expected next site location

More than four-fifths of all construction workers 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 (84%) and this proportion has increased steadily since 2012 (75% in 2015 and 69% in 2012). The remaining 1 in 6 workers are sure that this won't be the case (4%); that it depends where the work is (8%); or they don't know (4%).

By region/nation the certainty that they will be able to commute daily from their permanent home to their next job ranges from 90% in the East of England and the South East and 89% in London, down to 78% in the East Midlands and South West and to 77% in Wales and 76% in the West Midlands. Workers who have worked in construction for the longest period of time are more likely to be confident of this (85% amongst those who've worked in the industry 5+ years, cf. 77% for under a year), but even amongst those that have worked in the industry for a short time there is a high level of confidence.

By trade/occupation, site managers are most confident (90%), along with plasterers (90%), plant/machine operatives (89%) and electricians (88%), while those working as labourers/general operatives and pipe fitters (both 79%) and in technical roles (77%) are least sure in this regard.



Workers that are certain that their next job will not be within commuting distance of their permanent home were asked to indicate which region/nation they expect to be working in next. The following figure summarises their responses by region/nation. Although the base sizes within each region/nation are very small (so some caution is needed), it gives an indication of the likely pattern of movement between regions/nations. Generally, the highest proportions in each region/nation expect their next job to be in same region/nation, but the exception to this is the East of England where the proportion that expect to work in the East of England is the same as the proportion that expect to work in London (21% in each case).

Figure 59: Expected location of next site/job

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

* denotes less than 0.5%

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

Q31



Sub-sector and sector mobility

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

Sub-sector mobility

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

Compared with 2015 there has been a significant increase in the proportion of construction workers that have been working in all areas except new housing. In 2018/19, half have worked on commercial work (51%) or public non-housing work (51%), compared with closer to a third in each case in 2015 (35% and 33% respectively). The proportion of construction workers that have been involved in infrastructure projects has increased from around a fifth in 2015 (21%) to around a third in 2018/19 (31%).

Three in ten construction workers have only worked on one project type (30%), compared with nearly half in 2015 (48%). This suggests a greater amount of diversity in terms of the work that construction workers have been involved in more recently.

Figure 60: Type of projects spent significant periods on

Base: All respondents

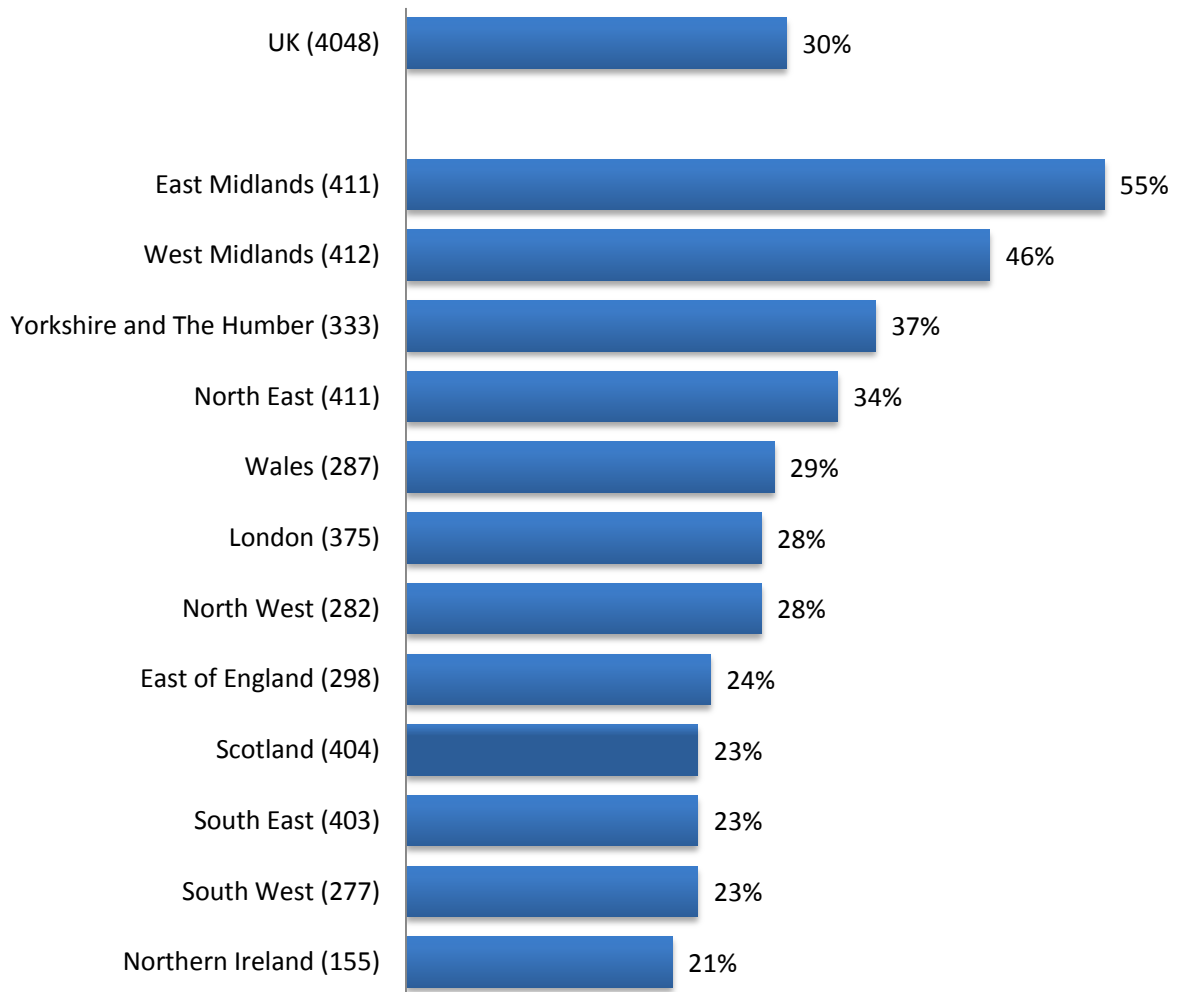
	2018/19 %	2015 %	2012 %
New housing	79	83	72
Commercial work such as shops, office, pubs etc	51	35	55
Public non-housing work such as schools, sports facilities, landscaping	51	33	59
Housing repair and maintenance including extensions/loft conversions	46	36	47
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	45	30	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	31	21	38
ONE TYPE ONLY	30	48	24
TWO TYPES	16	14	17
THREE TYPES	14	11	15
FOUR TYPES	12	8	13
FIVE TYPES	13	9	15
SIX TYPES	14	9	15
<i>Unweighted bases</i>	<i>4048</i>	<i>4771</i>	<i>4993</i>

Q4



The number of project types worked on varies significantly by region/nation. More than half of workers in the East Midlands (55%) and nearly half of those in the West Midlands (46%) have only worked on one project type, compared with around a fifth of construction workers based in Northern Ireland (21%), the South West (23%), and Scotland (23%). This suggests that the type of construction work on offer in these areas requires workers to be more flexible in terms of the type of work they undertake. For other regions/nations the project types are more stable.

Figure 61: Proportion of workers that have only worked on one project type
Base: All respondents



Unweighted bases in parentheses Q4



The likelihood that workers have worked only on one project type declines as age increases, as one would expect (from 65% of 16 to 19 year olds to 23% of 45+ year olds). By current trade/occupation, those workers most likely to have only worked on one project type include labourer/general operatives (40%), bricklayers (38%) and technical staff (38%), while painter/decorators (16%) and electricians (16%) are least likely. Scaffolders (31%), plant/machine operatives (20%) and site managers (18%) are most likely to have worked on all six project types.

Figure 62: Number of sub-sectors worked in, by occupation

Base: All respondents

	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Labourer/general operative (707)	40	20	12	12	7	8
Bricklayer (514)	38	13	10	9	13	16
Technical (171)	38	16	13	15	11	8
Pipe fitter (62)	35	21	13	12	10	10
Roofer (82)	33	19	15	9	13	11
Carpenter/joiner (429)	32	17	15	12	13	11
Plumber (156)	30	16	14	14	16	9
Plasterer (51)	28	20	16	10	12	13
Dryliner (112)	26	18	27	12	9	8
Plant/machine operative (315)	26	13	17	13	12	20
Scaffolder (166)	26	14	11	12	6	31
Site manager (383)	25	16	14	12	15	18
Electrician (227)	16	15	16	14	23	16
Painter/decorator (95)	16	12	15	18	27	12
<i>Unweighted bases in parentheses</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. Nearly half of all workers believe they definitely will be (48%), a further quarter thinks it is very likely (26%); and 11% think it is quite likely. Overall, 86% of construction workers think it likely they will still want to be working in construction in 5 years' time.

One in ten construction workers consider it unlikely, with just 1% saying they definitely will not be and a further 4% hoping to be retired by then. One in twenty (5%) do not know.

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 49% believe they will definitely want to be working in the construction sector, 27% believe it is very likely they will want to be working in the construction sector, and 12% believe it is quite likely they will want to be working in the construction sector. Only 7% think on any level of likelihood that they will not want to be



working in the construction sector in 5 years time and this proportion is the same as reported in 2015.

The UK construction workforce 2018-19 summary

Across the wide range of issues covered within the 2018/19 survey there are indications of more flexible, adaptive working patterns across the UK construction workforce. There has been a reversal of the increase reported in 2015 in the proportion of workers employed directly by companies, decreasing to 49%, compared with 54% in 2015, and there has been a corresponding increase in the proportion that are self-employed (from 39% in 2015 to 43% in 2018/19). Furthermore, there has been an increase in the proportion of workers that are employed on a temporary basis since 2015 (from 23% to 28%).

Compared with 2015, workers were more likely to expect to stay on the site they were currently working on for between a month and a year (from 28% to 51%), with the proportions anticipating less time and more time at their current site both decreasing. This suggests an increase in medium-term project working since 2015.

Compared with 2012, workers are more likely to have worked in more than one trade (from 22% in 2012 to 34% in 2015 and 36% in 2018/19), which suggests a greater willingness, perhaps necessity, to undertake different types of work.

This is also reflected in the fact that workers are more likely than in 2015 to have worked in multiple project areas, with 70% having worked in two or more, compared with 52% in 2015.

Half of construction workers report working at their current location because their employer sent them there. This represents a significant change, as this compares with only around two-fifths in 2012 and 2015. The extent to which this is a driver of workplace location varies by region/nation, with workers in the North East and West Midlands most likely to cite being sent to the site by an employer, and those in Northern Ireland and the South West most likely to work where they do because they have lived there/grew up there or for other family reasons.

There has been little change in the extent of mobility of workers overall since 2015, with just over two-fifths having worked in their current/region for their whole construction career (44% in both 2018/19 and 2015). Around three-quarters, again as in 2015, have remained in the region/nation in which they began their career in construction (72% in 2018/19, 75% in 2015). The proportion of workers in temporary accommodation has not changed since 2012.

In terms of skills and qualifications it is encouraging to note that virtually all construction workers continue to hold some form of skill card or certificate. A higher proportion than in 2015 are working towards a construction qualification (15%, compared with 12%) and there has been a slight increase in the proportion holding a formal qualification in 2018/19 (72%, compared with 67% in 2012).

Fewer workers in 2018/19 than in 2015 believe they would benefit from training in basic skills (11% and 14% respectively) with workers in London and BME and migrant workers most likely to believe they would benefit.



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