

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

South West Report - April 2019





Study prepared by BMG Research from a commission by CITB.

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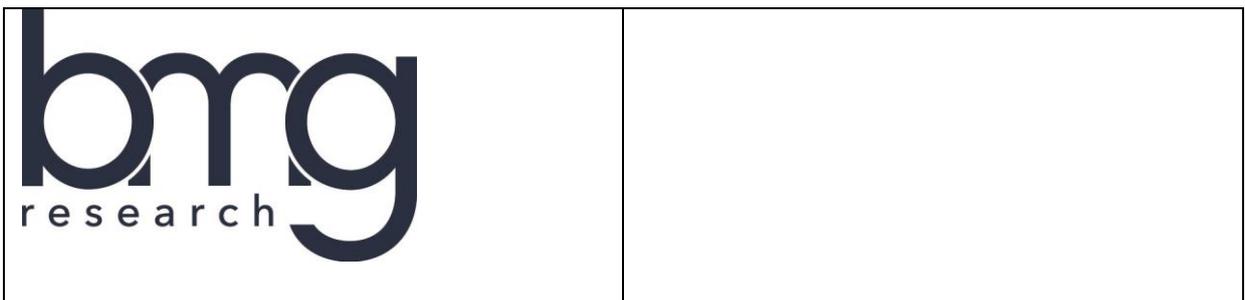




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Executive summary

Introduction

- CITB commissioned BMG Research to undertake the 2018/19 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 4048 construction workers undertaking manual roles on sites across the UK and 277 interviews were conducted with construction workers in the South West region.

Profile of the sample

- All but 2% of construction workers are male. Nearly half the construction workers interviewed in the South West are aged under 35 (43%), which is a higher proportion than the UK population as a whole (36%), but similar to the UK average in the survey (45%). Just 3% of construction workers are aged 60 or over.
- Overall, 5% of the South West construction workforce is of BME ethnic origin, which is in keeping with an incidence of 6% in the South West population as a whole. The UK average in the survey is 6% (compared with 15% of the UK population as a whole).
- By trade/occupation, the highest proportion of the South West sample is accounted for by labourers/general operatives (17%), bricklayers (11%), carpenters/joiners (9%) and site managers (8%). The proportion of labourers/general operatives has declined to 2012 levels after increasing in 2015 (17% cf. 22% in 2015; 16% 2012) while the proportion of bricklayers has also declined (11% cf. 20% in both).
- Three in ten of all those interviewed in the South West perform a supervisory or management role on their site (30%); a higher proportion than in 2015 (25%) and in line with the UK average in 2018/19 (30%).
- Just under half of construction workers interviewed for the survey in the South West are employed directly by a company (47%), which is a slightly lower proportion than the UK average (49%). Two-fifths of workers in the South West are self-employed (40%) and this is also a lower proportion than the UK average (of 43%). Since 2015 there has been a decrease in the proportion that are directly employed (from 67% in 2015) and an increase in the proportion that are self-employed (from 26% in 2015). 13% of construction workers in the South West work for an agency, which compares with 7% nationally and 7% within the South West in 2015.
- Over two-fifths of all construction workers in the South West (43%) are employed on a temporary rather than permanent basis. This is a higher proportion than the UK average (28%). By occupation the proportion is highest amongst labourers/general operatives (68%).
- Just over two-thirds of construction workers in the South West work between 40 and 49 hours per week (70%, compared with a UK average of 60%), while a quarter (26%) work more than 50 hours per week, which is slightly higher than the UK average (23%).



Work history

Time in the sector

- A third of all South West construction workers have worked in the industry for at least 20 years (32%), which is in line with the UK average (32%). Around three-fifths have done so for 10+ years (60%).
- Around three in five construction workers in the South West have only ever worked within the construction industry (59%), which is slightly higher than 2015 (55%), and slightly more than the UK average in 2018 (56%). Just under half of South West construction workers (48%) have worked pretty much continuously in construction, without spells out of work, and this is less than the UK (56%).

Previous non-construction jobs

- Amongst the one in four (26%) construction workers in the South West worked in another sector before starting work in construction. The sector worked in beforehand is most likely to have been manufacturing (51%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked as managers/directors/senior officials (29%) or in skilled trade occupations (25%).

Occupational switching within the construction sector

- Just under half of construction workers in the South West (46%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is higher than in 2015 (36%) and compared to the UK average in 2018/19 (36%). The proportion that has worked in more than one role is significantly higher amongst site managers (86%).
- Workers are most likely to have previously worked as a labourer/general operative (38%); while one in six have worked as a carpenter/joiner (18%).
- Thinking about their future plans in the construction sector, eight in ten construction workers in the South West would like to carry on in the same trade or occupation (80%), while one in ten would like to change their trade/occupation (10%) and a further 1 in 20 would like to leave the construction industry altogether (5%). The proportion that wants to carry on as they are is the same as the UK average (80%).
- The most popular occupation to which construction workers in the South West would like to change is site manager (34% of those who would like to change).
- Just over nine in ten construction workers in the South West who would like to change trade/occupation (93%) believe they will require further training or qualifications in order to do so. This is a higher proportion than the UK average (87%).
- The main reason for wanting to change trade/occupation is the belief that workers will be better paid (66%), followed by workers wanting the chance to make better use of their skills/abilities (38%), being bored with what they are currently doing (24%), or believing it will lead to less physical work (24%).



Qualifications and skills

Skills cards/certificates

- Most construction workers in the South West, as across the UK as a whole, hold some form of construction skill card or certificate (97% cf. 96% in 2015, 97% in 2012 and a UK average in 2018/19 of 97%).
- Younger workers (82% of 16-19 year olds) and those who have worked in construction for less than a year (84%) remain less likely to hold a skill card/certificate.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held (89% in the South West; 85% across the UK).
- Card colours vary by age and particularly by occupation; younger workers are more likely to hold Red Trainee cards (21% of 16 to 19 year olds with a CSCS card), while those aged 20-24 and 45+ are most likely to hold Blue cards (33% in each case). Labourers/general operatives are most likely to hold Green cards (76%).

Construction-specific qualifications

- 68% of construction workers in the South West say they had no formal qualifications when they first started working in the construction industry. This compares with a slightly higher UK average (72%).
- By current trade/occupation, the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (77%) and lowest amongst carpenters/joiners (52%).
- Compared with three in ten construction workers in the South West that had qualifications when they first started working in construction (28%), nearly three-quarters of all construction workers in the region now report holding some sort of construction related qualification (74%, compared with 72% in 2015 and a UK average in 2018/19 of 72%).
- Within the South West, the proportion of workers that currently hold any qualifications is lower than average amongst workers who have worked in construction for less than a year (32%). Just over half of the youngest age group hold qualifications (53% of 16-19 year olds), which is lower than other age groups, but not significantly so.
- By trade/occupation, proportions holding qualifications vary from the majority of site managers (91%), carpenters/joiners (88%) and bricklayers (87%) down to just half of labourers/general operatives (49%).
- The qualifications most likely to be held by construction workers in the South West are NVQ/SVQ qualifications (63% of those with qualifications) while 1 in 6 construction workers in the region with qualifications hold City & Guilds qualifications (17%). One in ten (10%) of construction workers with qualifications now hold an apprenticeship.



Basic skill needs

- One in ten construction workers in the South West believe they would benefit from some form of training in basic skills (11%), which is a similar proportion to 2015 (12%) but is down compared to 2012 (28%). This is in line with the UK average in 2018/19 (11%).
- In terms of the type of training required, maths is the most commonly cited (7%) followed by reading (5%), writing (4%) and speaking English (3%).

Current study for qualifications

- One in five construction workers in the South West are currently working towards formal qualifications relevant to the construction industry (19% cf. 15% in 2015 and 2012 and a UK average in 2018/19 of 15%). This proportion is higher amongst 16-19 year olds (41%) and 20-24 year olds (32%), and amongst those who have worked within the construction industry for less than 5 years (33%).
- Amongst workers with no qualifications, 21% are currently working towards a qualification.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role, just under half are certain that they would not like to do so (46%), a lower proportion than across the UK (51%), while one in three would like to do so (33% cf. 29% in 2015) and a fifth are unsure (21%).
- One third of construction workers in the South West (33%) and four-fifths of those who have had some form of supervisory or management responsibilities (80% cf. 71% in 2015 and 67% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions are roughly in line with the UK average (34% and 81% respectively).
- SMSTS (Site Manager Safety Training Scheme) is more frequently mentioned as the type of training received (48%), followed by Site Safety Supervisors Courses (38%) and in-house training (31%).

Overall skill levels

- The vast majority of construction workers in the South West (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 under one in five of South West construction workers (18%) hold a skill card/certificate, but have no other construction qualification. This compares with a higher UK average of 22%.
- Overall, three in five South West construction workers that provided a response have qualifications equivalent to Level 2 or above (61% cf. 65% in 2015, and 59% across the UK in 2018/19); one in five hold qualifications equivalent to Level 3 or above (19% cf. 33% in 2015).



Geographic mobility

Work history in the region/nation

- That they grew up there/have always lived there (68%) is the most likely reason why construction workers are based within the South West, followed by the fact that their employer sent them there (17%). A lower proportion state that it is because their employer sent them there in 2018/19 than in 2015 (22% in 2015) contrary to the UK-wide picture.
- In 2018/19 compared with 2015, a lower proportion of construction workers in the South West have worked within their current region for their entire construction career (43% cf. 50% in 2015 and 48% in 2012). The majority of construction workers in the region have remained in the South West for all or most of their career (83%). This is higher than the UK average of 77%.
- Four-fifths of construction workers in the South West (81%) were also based in the region for their last job and this proportion is higher than in 2015 (76%).

Worker origins

- Overall, more than three-quarters of all construction workers in the South West were interviewed in the same region they were living in when they started their construction career (76% cf. 76% in 2015). There are considerable variations in the extent to which workers have remained in their original locality, with the proportion being highest in Scotland (96%) and Northern Ireland (95%) and lowest in the East of England (44%).
- Three-quarters of construction workers in the South West (75%) have remained in the same region as they did their first qualification/training in.
- Two in five construction workers in the South West have travelled at least 50 miles from their permanent home to work in the last 12 months (40%). The proportion who have travelled more than 100 miles from their permanent home in the last 12 months (18%) is in line with the UK average (17%).
- Overall, just 3% of construction workers in the South West (7% in 2015) are currently staying in temporary accommodation while working at their site. This proportion is slightly lower than the UK average (5%).
- The average (mean) distance from workers' current residences (taking into account temporary residences) to their current site was 12 miles (18 miles is the UK average) which is less than in 2015 when workers in the region travelled an average (mean) of 24 miles.

Site duration and change

- Over a third of the temporary workers in the South West (36%) do not know how much longer they can expect to be working for their current company/agency. This compares with a UK average of 38%.
- When all respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase, just under a fifth expect to stay on that site for a year or longer (18% cf. UK average of 18%), which is a decrease compared with 2015 (27%). However, in 15% of cases (cf. 23% in 2015) workers do not know how much



longer they can expect to be on site, indicating a decrease in the degree of uncertainty in the last 3-4 years.

- More than three-quarters of all South West 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 (78% cf. 73% in 2015 and 72% in 2012). This is a lower proportion than the UK average in 2018/19 (84%). The remaining fifth say it depends/they don't know, that it depends where the work is, or that they won't be able to commute.

Sub-sector and sector mobility

Sub-sector mobility

- As in 2015, the vast majority of construction workers in the South West have worked on new housing (81% in both 2018/19 cf. 83% in 2015 and 76% in 2012). For all other types of projects, the proportion of construction workers that have worked on them has risen since 2015.
- Overall, under a quarter of all construction workers in the South West have only worked on one project type (23%), which is a much lower proportion than in 2015 (47%) and lower than within other regions/nations (UK average is 30%).

Leaving the sector

- In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Amongst construction workers in the South West, half say they definitely will be (50% cf. UK average of 48%); more than a third think it is very (23%) or quite likely (15%); 4% consider it unlikely; and just 1% say they definitely won't be. A further 4% hope to be retired by then, while 4% don't know.



Introduction

Aims and objectives

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

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

The specific objectives of this research project were to:

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

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

Method

The 2018/19 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2015. Overall, 4048 interviews with construction workers in manual roles across the UK were completed, split between the 12 standard regions/nations. In total, 277 interviews were conducted in the South West.



Sampling

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

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

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

Project eligibility criteria:

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

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

Telephone-based site recruitment

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

Site visits

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



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

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

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

Figure 1: Interviews and weights by region/nation

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

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

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

Notes on reading this report

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

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

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



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

'*' 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.

South West is referred to by the abbreviation 'SW' in tables.

Profile of construction site workers

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

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

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

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



Personal demographics

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

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

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

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

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

Within the South West, the youngest age group (16 to 24 year olds) account for a fifth of construction workers (18%), a slightly lower proportion than in 2015 (22%) and 2012 (21%). Compared with 2015 there is a slightly smaller proportion of workers aged 25 to 34 years (25% cf. 28%), while the proportion of workers aged 35 to 44 is slightly higher than in 2015 (22% cf. 18%). The proportion of 45 to 54 year olds among South West construction workers is larger than in 2015 (24% cf. 20%) as is the proportion of workers aged 55 and over (10% cf. 11%). Workers aged 60 and over account for just 3% of construction workers.



Compared with the UK construction workforce overall, the proportion of construction workers aged under 35 is the same in the South West as in the UK overall (45% in each case cf. 36% of economically active adults across the UK).

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

Base: All respondents

	SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %		UK Workforce* %
16 to 19 years	6	8	6	7	5	16 to 19 years	4
20 to 24 years	12	14	15	16	12	20 to 24 years	9
25 to 34 years	25	28	29	20	28	25 to 34 years	23
35 to 44 years	22	18	23	25	23	35 to 49 years	33
45 to 54 years	24	20	18	20	20	50 to 64 years	27
55 to 59 years	7	6	8	11	7		
60+ years	3	5			4	65+ years	4
<i>Unweighted bases</i>	277	494	407	255	4048		32,277,500

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

In terms of ethnicity, the vast majority of construction workers in the South West are of White origins, but this has fallen slightly compared to previous years (95% cf. 98% in 2015 and 98% in 2012).

Workers of Black (1%) and Asian (0%) ethnic origin make up similar proportions of the sample as in previous years.

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

Base: All respondents

	SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %	UK Population aged 16-64* %
White	95	98	98	98	94	85
Black	1	1	<0.5	2	2	3
Asian	0	<.0.5	<0.5	0	2	6
Mixed	2	-	-	-	1	1
Other/Not stated	1	<0.5	2	0	1	4
<i>Unweighted bases</i>	277	494	407	255	4048	41,217,200

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



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

There is a similar proportion of South West construction workers of BME origin compared to the South West's population (aged 16-64) as a whole (5% cf. 6%). However, there has been an increase in the South West's proportion of BME workers compared to 2015. The South West has a proportion of construction workers that are of BME origin which is similar to the proportion in the UK construction workforce as a whole.

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

Base: All respondents

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

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



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

The majority of construction workers in the South West (91%) originated from the UK and the remaining 9% originated from outside of the UK. No more than 1% of construction workers originate from a single specified country.

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

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

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

Just 7% of construction workers in the South West hold a passport for another country. This compares with a UK average of 14%. The majority hold a UK passport (87%), with a further 5% reporting that they do not have a passport. Of those with a non-UK passport, nearly nine in ten (89%, equating to 6% of all South West construction workers) state that it is an EU member state passport.

Of those construction workers in the South West that were born outside of the UK or have a non-UK passport, 31% have British citizenship, which compares with a UK average of 14%.

Overall, most South West construction workers have lived in the UK all of their life (86%). This proportion is significantly higher than the UK average (80%).

A small proportion of South West construction workers (5%) indicate that they have a long-term illness, health problem or disability which limits the type of work they can do. The most common illness/disability amongst these workers is to do with reduced physical capacity, such as an inability to lift, carry or otherwise move everyday objects, debilitating pain and lack of strength, breath, energy or stamina, asthma, angina or diabetes (60%). The next most common is to do with conditions that can cause physical co-ordination difficulties (7%) and hearing issues (7%). Across the UK, 3% of construction workers indicate they have a long-



term illness, health problem or disability, and the most common condition is a reduced physical capacity (50%).

Occupational profile

Current job role

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

In 2018/19 labourers/general operatives, bricklayers and carpenter/joiners are the top three occupations amongst construction workers in the South West. This reflects the profile across the UK. There has been a decline in the proportion of bricklayers in the South West compared to 2015 (11% cf. 20%).

Figure 7: Occupational profile

Base: All respondents '-' = not applicable

	SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
Labourer/General operative	17	22	16	12	16
Bricklayer	11	20	20	15	11
Carpenter/joiner	9	10	12	16	10
Site manager	8	8	0	0	11
Plant/machine operative (e.g. fork lift/JCB)	6	5	6	18	7
Electrician	6	6	8	7	6
Scaffolder	5	4	6	2	4
Plumber	4	2	6	3	4
Ground worker	4	3	0	0	4
Dryliner	4	3	3	With plasterer	3
Roofer	3	2	4	3	2
Painter/decorator	2	2	5	1	2
Technical	2	2	1	2	4
Pipe fitter	2	<0.5	-	-	2
Glazer/window fitter	2	<0.5	-	-	1
Plasterer	1	1	2	8	1
Banksman/banksperson	1	1	2	1	1
Floorer	1	1	1	2	<0.5
Mechanical fitter	1	<0.5	-	-	1
Steel erector/rigger	1	2	1	2	1



Supervisor/foreman	1	1	<0.5	8	2
Unweighted bases	277	494	407	255	4048

Q5

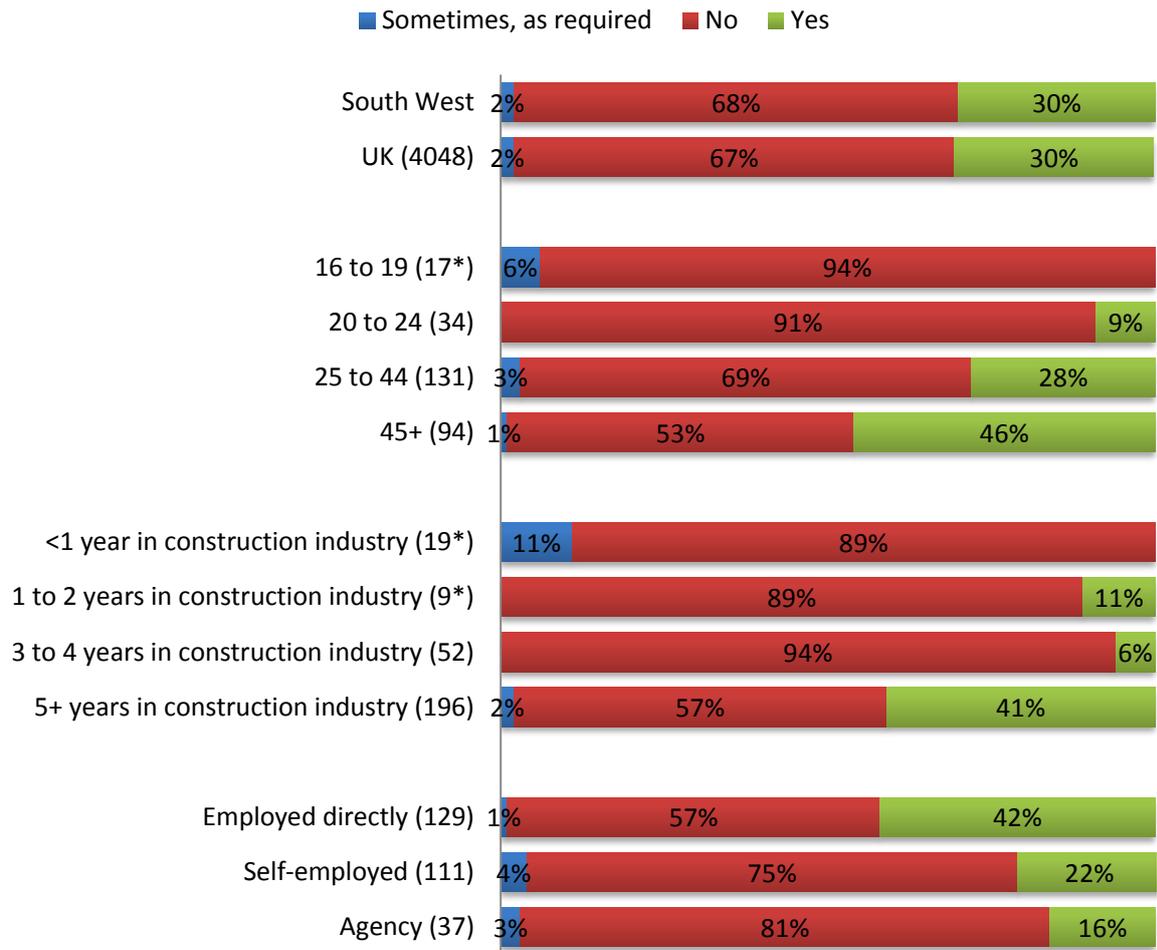
Supervisory roles

Three in ten of all construction workers in the South West interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (30%). This is a higher proportion than in 2015 (25%) and is in line with the UK average in 2018/19 (30%).

The incidence of workers in a supervisory role is considerably lower amongst workers aged under 25 and amongst those that have worked in the construction industry for less than 5 years, as one would expect. Workers who are directly employed by a company (42%) are more likely than those that are self-employed (22%) or work for an agency (16%) to perform a supervisory or management role. These differences are summarised in the following figure.

Figure 8: Whether respondents perform a supervisory or management role

Base: All respondents *caution: small sample base



Unweighted bases in parentheses Q8



Employment status

The highest proportion of construction workers within the 2018/19 South West sample are employed directly by a company (47%). This is a lower proportion than in 2015 (67%) and 2012 (53%).

Two-fifths of construction workers within 2018/19's South West sample are self-employed (40%), which is a higher proportion than in 2015 (26%) and 2012 (41%).

The proportion of workers who are self-employed increases by age from 24% of 16 to 19 year olds to 44% of workers aged 45+. The proportion of respondents that are self-employed increases to 84% of bricklayers. 13% of the sample is accounted for by construction workers who are working for an employment agency – an increase compared to 2015 (7%) and 2012 (6%).

Figure 9: Employment status

Base: All respondents caution: small sample base

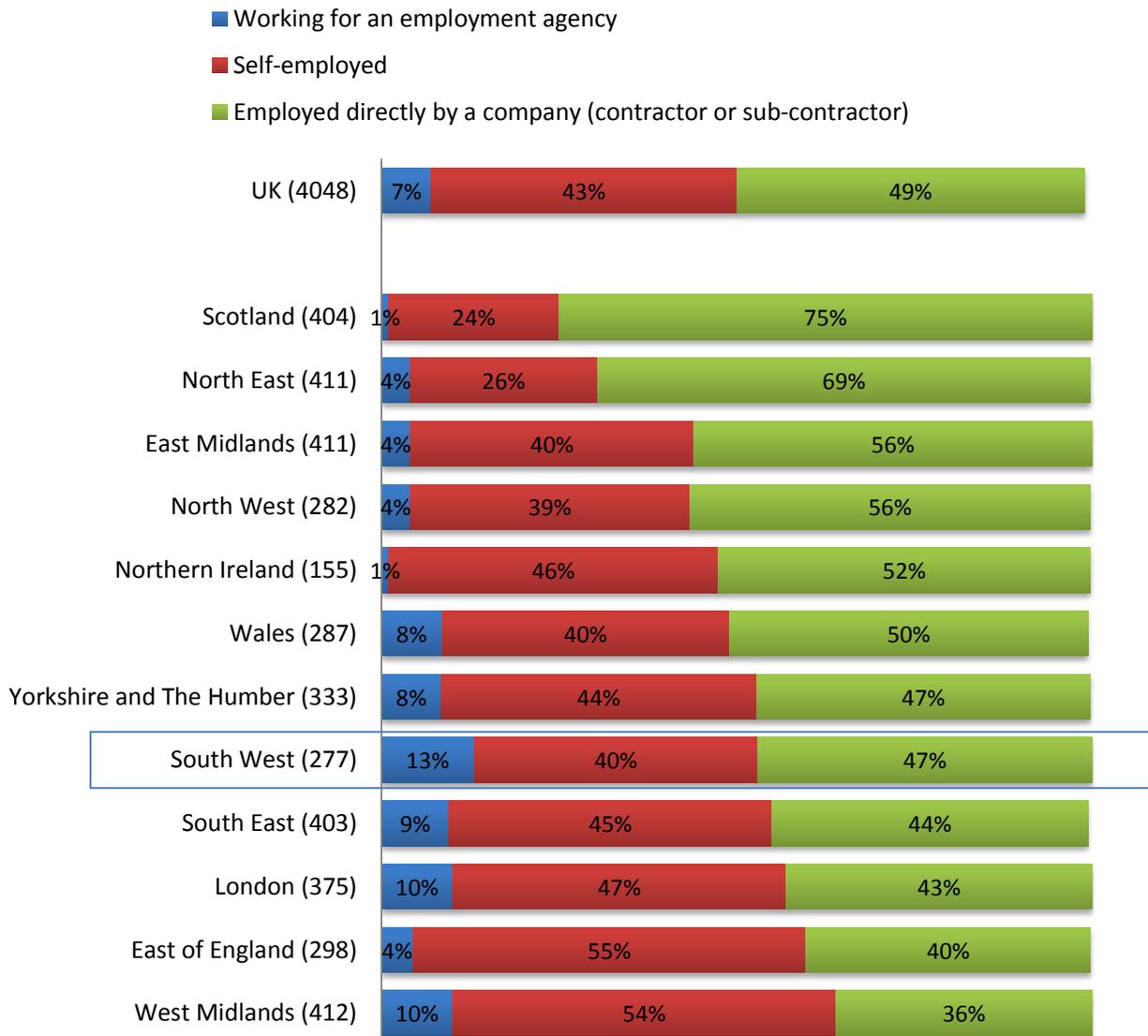
	SW 2018/19 %	SW 2015 %	SW 2012 %	UK 2018/19 %	Years working in construction			
					<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	47	67	53	49	42	11	54	47
Self-employed	40	26	41	43	32	56	27	43
Working for an employment agency	13	7	6	7	26	33	19	10
Working on some other basis	0	<0.5	0	<0.5	0	0	0	0
<i>Unweighted bases</i>	277	494	407	4048	19*	9*	52	196

Q20



The South West has an employment status profile that differs slightly from the UK average in that it has the highest proportion of those working for an employment agency of any of the regions/nations. Compared with UK construction workers, those in the South West are more likely to work for an agency and less likely to be self-employed or be employed directly by a company.

Figure 10: Employment status by region/nation
Base: All respondents



Unweighted bases in parentheses Q20



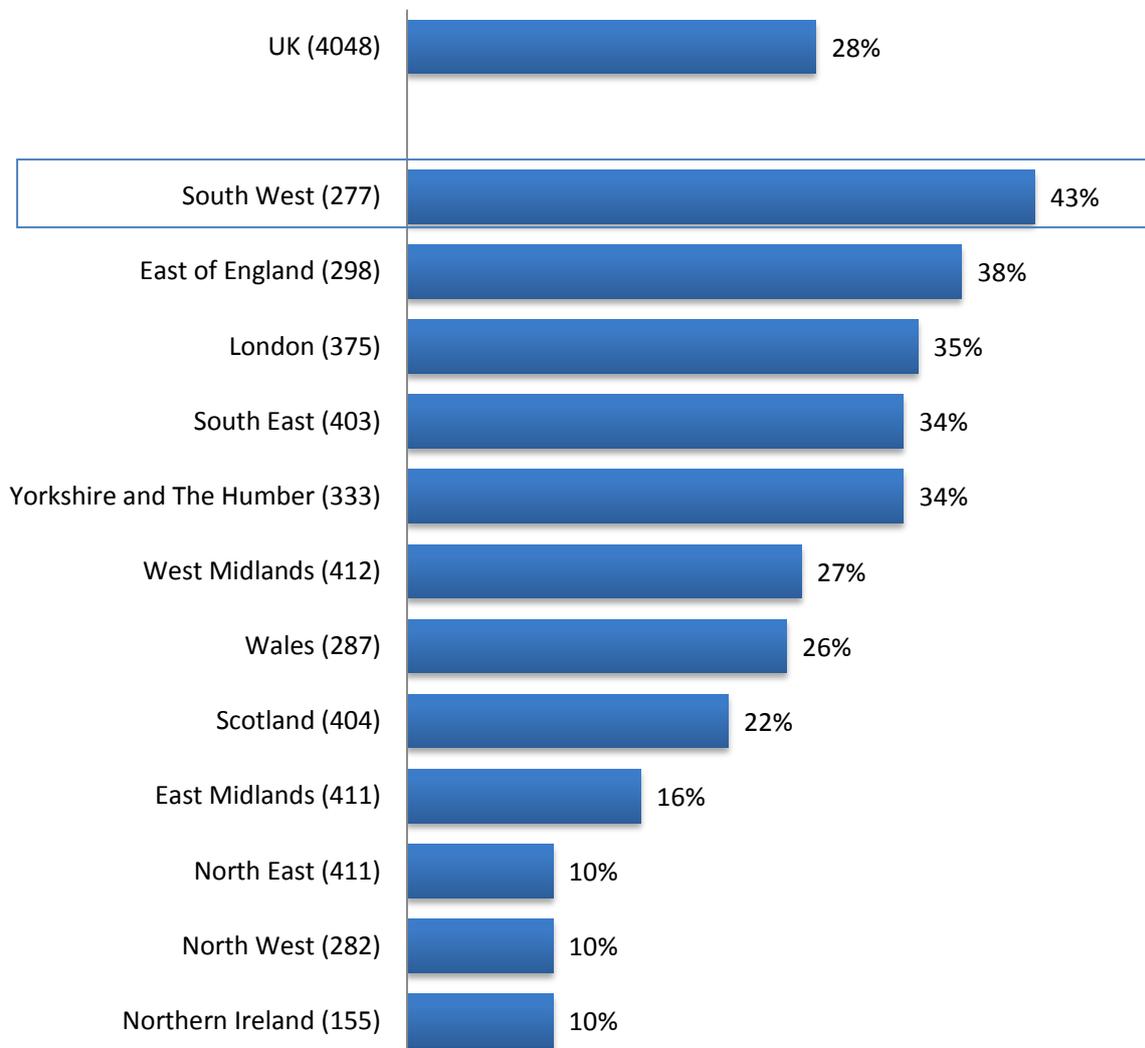
Employment contract basis

The South West is the region with the highest proportion of construction workers employed on a temporary basis in the UK. Over two in five South West construction workers (43%) are employed on a temporary rather than permanent basis. This reflects a move towards more temporary employment in 2018/19 compared with 2015 when just under a fifth (18%) was employed on a temporary basis.

Amongst workers who are employed by an agency, the proportion on temporary contracts is significantly higher than it is amongst those who are self-employed or employed directly (95%, compared with 70% and 4% respectively).

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

Base: All respondents



Unweighted bases in parentheses Q21

By current trade/role, the proportion working on a temporary basis is higher than average amongst labourers/general operatives (68%).



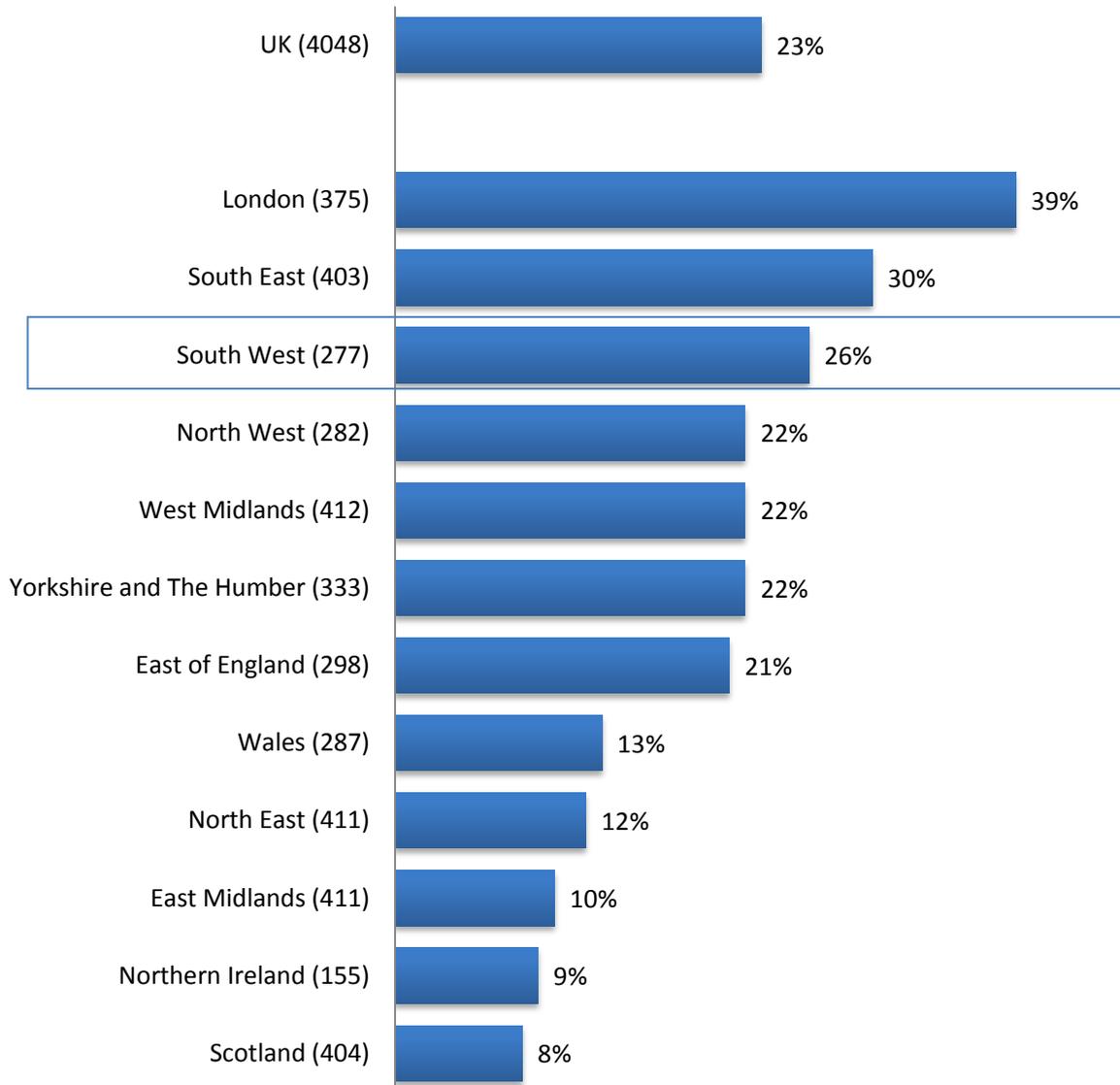
Hours worked

Construction workers in the South West, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (70%), compared with a UK average of 60%). Just over a quarter (26%) work more than 50 hours a week, which is just above the UK average (23%).

Figure 12: Proportion of workers that typically work 50 or more hours per week

Base: All respondents

Unweighted bases in parentheses



Unweighted bases in parentheses Q22



Work histories

Time in the sector

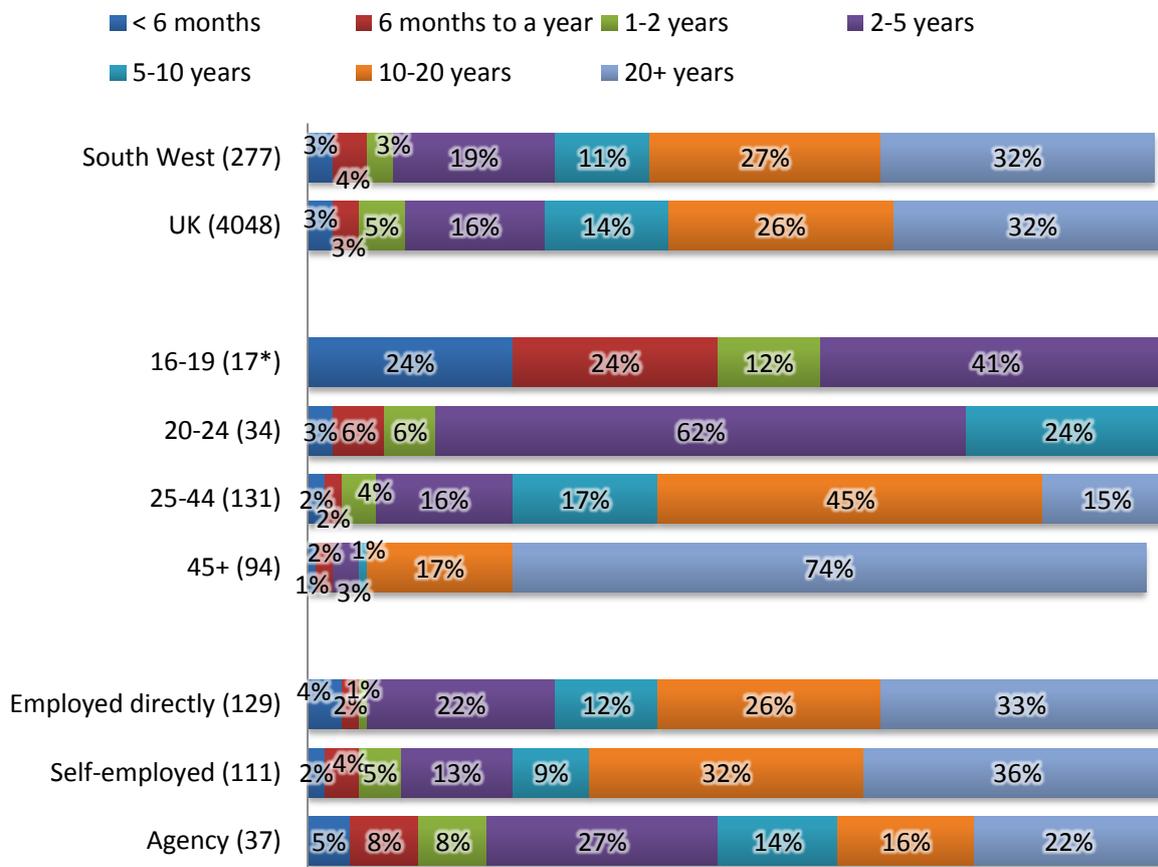
A third of South West construction workers have worked in the construction industry for over 20 years (32%) and three-fifths have worked in the industry for at least 10 years (60%).

The length of experience in the industry increases with age. Nearly three-quarters of workers aged 45 and over in the South West that have more than 20 years' experience of working in the construction sector (74%).

Figure 13: Years spent working in the construction sector

Base: All respondents

*caution: small sample base



Unweighted bases in parentheses Q1



Figure 14 shows that workers are as likely to have worked in the construction sector for more than 20 years in 2018/19 as in 2015; 32% have 20+ years' experience, compared with 31% in 2015. 40% have 10 or fewer years' experience, compared with 44% in 2015.

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

Base: All respondents

	SW 2018/19	SW 2015	SW 2012	SW 2007	UK 2018/19
	%	%	%	%	%
Less than 6 months	3	4	1	2	3
Up to a year	7	9	4	7	6
Up to 2 years	10	15	9	15	12
Up to 5 years	29	27	21	31	28
Up to 10 years	40	44	42	44	42
Up to 20 years	68	68	67	67	68
More than 20 years	32	31	33	32	32
<i>Unweighted bases</i>	277	494	407	255	4048



Pre-construction employment histories

Nearly three in five workers in the South West have only ever worked in the construction industry (59% cf. 67% across the UK and 66% within the South West in 2015). This includes more than half who have worked in construction pretty much continuously (48%); 5% for whom this is their first job; and a further 6% that have only ever worked in the construction sector but have had spells out of work.

The youngest age group, 16-19 are the least likely to have worked continuously in construction (35%) but are also, unsurprisingly, more likely to say that this is their first job and that they haven't worked in other industries (18%).

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

*All respondents *caution: small sample base*

	SW 2018/19 %	SW 2015 %	UK 2018/19 %	Age %			
				16 to 19	20 to 24	25 to 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	48	52	56	35	53	47	51
I have only worked in construction jobs but have had spells of being out of work	6	3	4	0	3	7	5
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	10	6	7	0	3	14	11
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	26	23	23	24	32	26	24
This is my first job. I haven't worked in any other industry.	5	11	7	18	6	2	6
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	5	3	3	24	3	5	2
<i>Unweighted bases</i>	<i>277</i>	<i>494</i>	<i>4048</i>	<i>17*</i>	<i>34</i>	<i>131</i>	<i>94</i>

Q2



Overall, a quarter of construction workers in the South West say that their first job after full-time education was not in construction and that they moved into the industry after working in other sorts of jobs/sectors (26%). This is a slightly higher proportion to that reported in 2015 (23%).

Those who had worked in other sectors before starting their construction careers were asked to give details of what they were doing immediately before they started working in construction. In just over half of cases, respondents had previously worked in manufacturing (51%) while around 1 in 5 had worked in wholesale and retail (22%) and in agriculture, forestry and fishing (19%).

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

Base: Where first job was not in construction

	SW 2018/19 %	SW 2015 %	UK 2018/19 %
C – Manufacturing	51	21	45
G – Wholesale and retail trade; repair of motor vehicles and motorcycles	22	20	19
A – Agriculture, Forestry and Fishing	19	6	9
N – Administrative and support service activities	1	3	1
J – Information and communication	1	3	<0.5
<i>Unweighted bases</i>	<i>72</i>	<i>127</i>	<i>862</i>

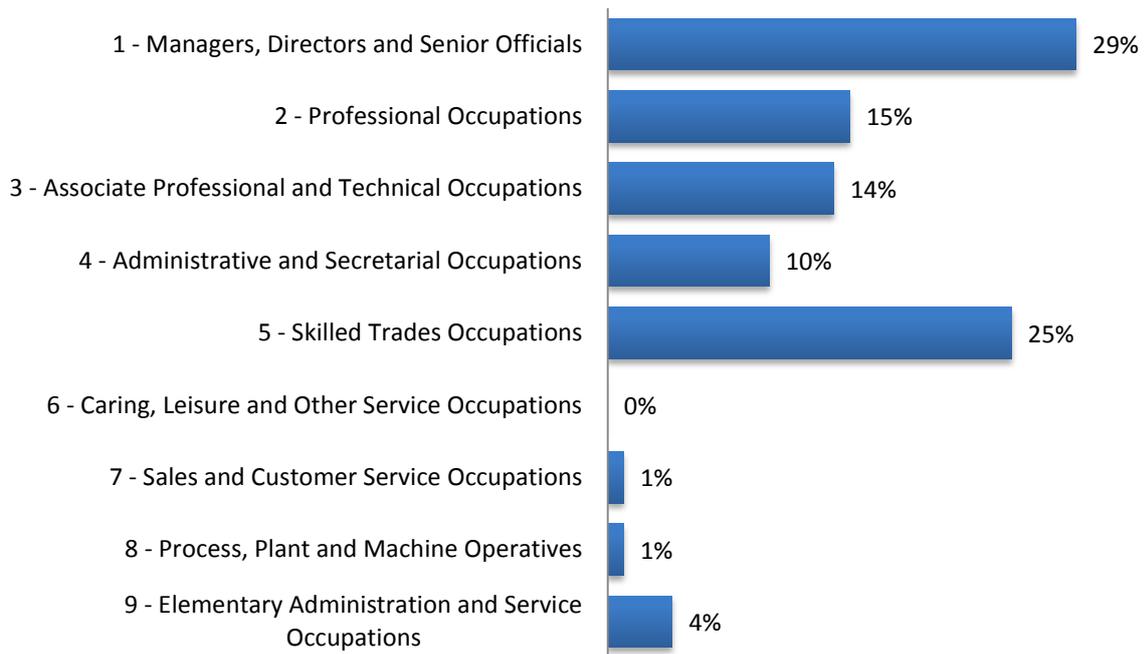
Q3



In terms of the job roles that South West construction workers have undertaken in other sectors, three in ten worked as a manager, director or senior official (29% cf. 10% in 2015 and 19% across the UK in 2018) while a quarter worked in skilled trade occupations (25% cf. 28% in 2015 and 27% across the UK in 2018). 14% worked in associate professional and technical occupations compared to 28% in the UK as a whole.

Figure 17: Job roles undertaken in other sectors

Base: Where first job was not in construction



Unweighted base = 72 Q3



Occupational switching and progression within construction

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

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

The proportion of workers that have had more than one role increases with age (to 56% amongst those aged 45+ cf. 6% amongst those 16 to 19 years*). (*Caution: small sample base)

As in 2015, there are also variations by current job role, with site managers (86%) and labourer/general operatives (60%) most likely to have had more than one role/occupation within construction. Meanwhile, bricklayers (32%) and carpenter/joiners (24%) are least likely to have had another trade within the construction sector. The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector.

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

Base: All respondents

MORE likely to have had more than one role			LESS likely to have had more than one role		
	SW 2018/19 %	UK 2018/19 %		SW 2018/19 %	UK 2018/19 %
Site manager (22)	86	69	Carpenter/joiner (25)	24	22
Labourer / general operative (47)	60	29	Bricklayer (31)	32	24

Unweighted bases for 2018/19 South West in parentheses

Q6



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

Workers are most likely to have previously worked as a labourer/general operative (38%) while 1 in 6 workers has previously worked as a carpenter/joiner (18%) or a plant/machine operative (17%).

Figure 19: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	SW 2018/19	UK 2018/19
	%	%
Labourer/General operative	38	34
Carpenter/joiner	18	19
Plant/machine operative (e.g. Fork lift/JCB)	17	10
Plasterer	14	8
Bricklayer	13	12
Roofer	13	8
Dryliner	13	8
Banksman/Banksperson	9	6
Painter/decorator	9	7
Scaffolder	7	4
Electrician	6	5
Pipe fitter	6	4
Plumber	6	5
Floorer	5	4
Ground worker	4	5
Mechanical fitter	4	1
Site manager	3	5
Steel erector/rigger	3	4
Technical e.g. surveyor, maintenance technician	3	3
Glazer/window fitter	3	1
Ceiling fixer	2	5
Tiler	2	<0.5
Welder	1	2
Supervisor	1	2
Demolition	1	<0.5
Other	7	8
<i>Unweighted base</i>	<i>127</i>	<i>1328</i>

Q7



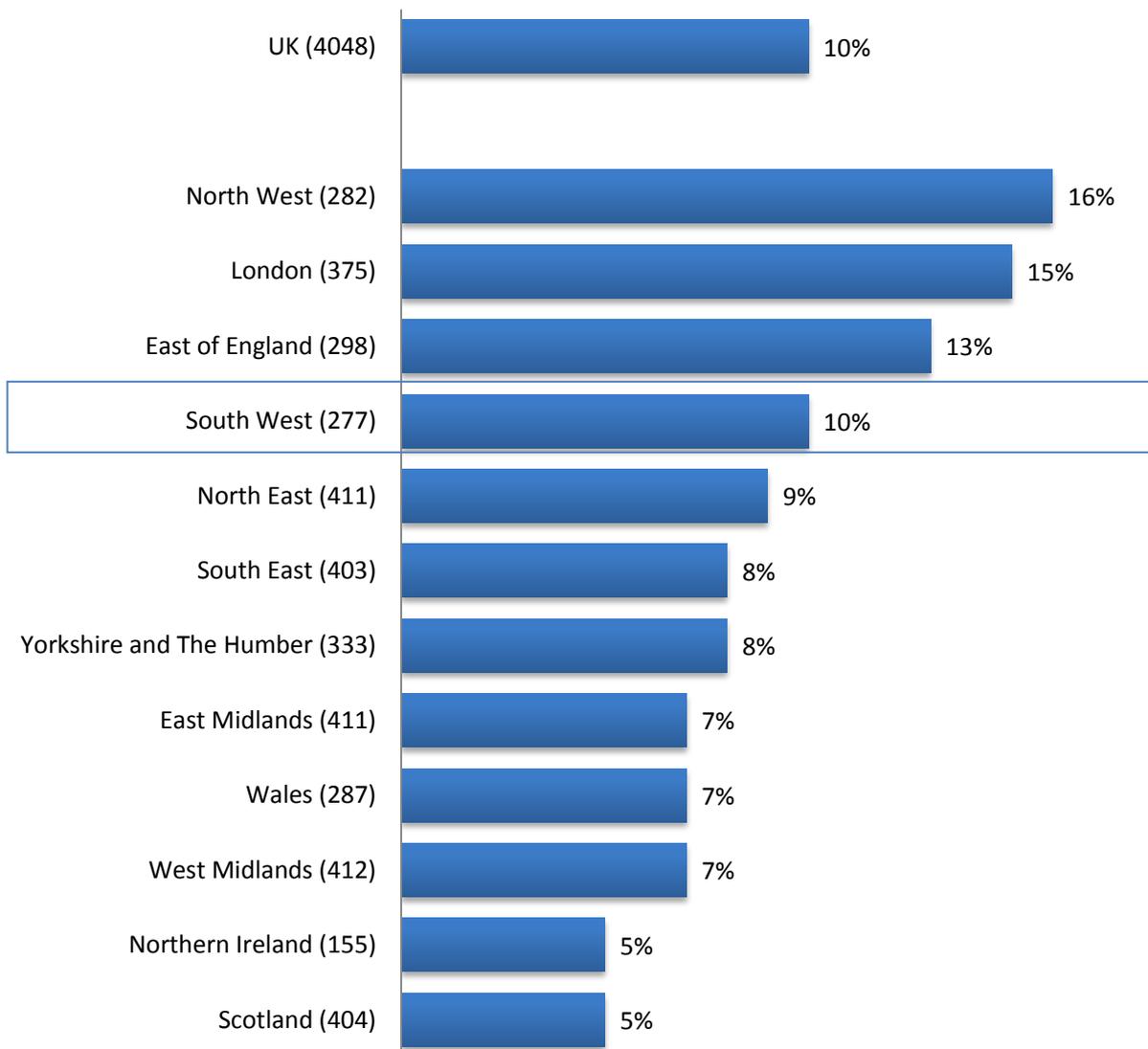
Future career plans

Thinking about their future plans in construction, eight in ten construction workers in the South West would like to carry on in the same trade or occupation (80%); one in ten would like to change their trade/occupation (10%); while 1 in 20 would like to leave construction (5%). The remainder (4%) are not sure.

South West construction workers are in line with the UK average both in terms of wanting to carry on as they are (80% across the UK) and in terms of wanting to change their trade/occupation (10% across the UK).

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

Base: All respondents



Unweighted bases in parentheses Q33



Construction workers aged 25 to 44 years are more likely than those in other age groups to want to change their trade or occupation (15%). Older workers are more likely than average to want to carry on as they are (83% of 45+ year olds).

By current trade/occupation, those working as a labourer/general operative are more likely to want to change their trade or occupation (26%).

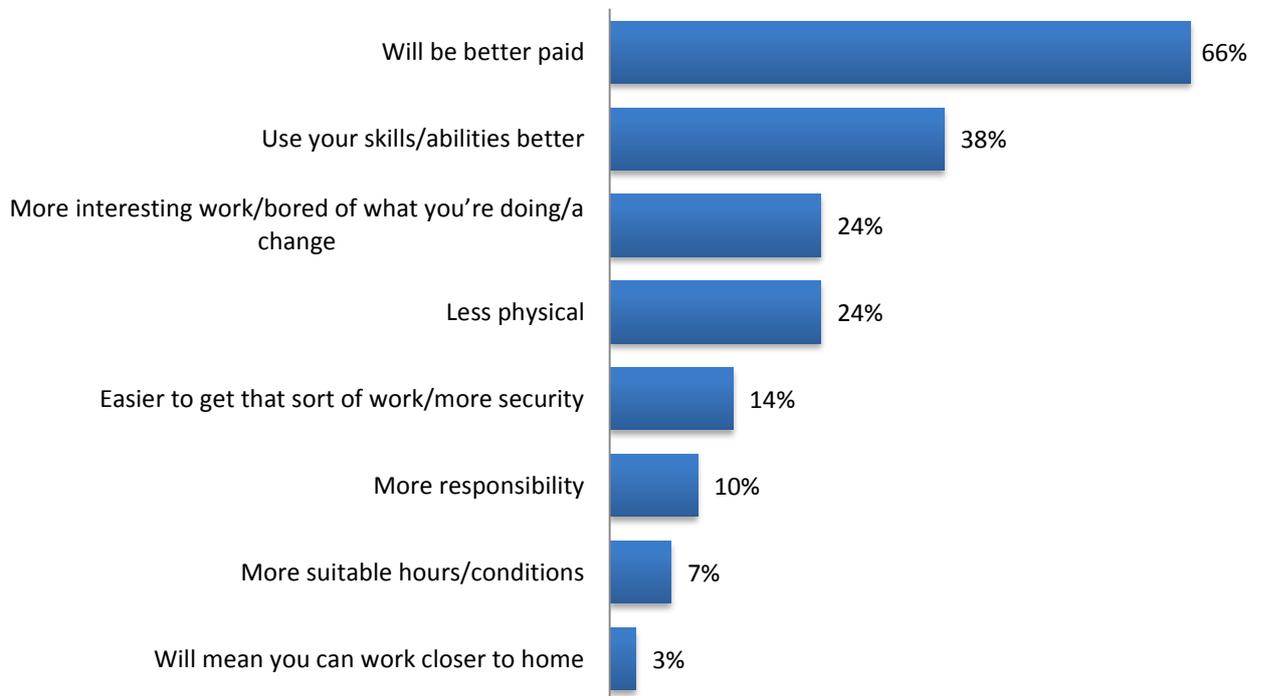
Amongst those who would like to change trade or occupation, a wide range of alternatives are mentioned. However, the highest proportion overall would like to be a site manager (34%).

In around nine in ten cases construction workers in the South West who would like to change trade or occupation believe they will require further training or qualifications in order to do this (93%). This is a higher proportion than in 2015 (72%) and across the UK in 2018/19 (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (66%). Around two-fifths (38%) want to use their skills/abilities better with the same proportion wanting work that is less physical. A quarter (24%) wants more suitable hours/conditions with the same proportion seeking less physical work.

Figure 21: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 29 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 3% of all construction workers in the South West (2% across the UK) say they do not hold any card. In total, 97% of all workers are certain that they hold at least one type of skill card or certificate that provides evidence to construction sites that they have received a certain level of health and safety awareness training.

Figure 22 summarises the proportion of workers by region/nation that hold any card and compares these proportions with previous surveys and the UK as a whole. The proportion which holds a skill card or certificate in the South West has remained consistent since 2012.

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

Base: All respondents

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



As in previous surveys, the incidence of workers holding skill cards or certificates remains lower amongst younger workers (82% amongst 16 to 19 year olds) and those who have worked within construction for a shorter period of time (84% amongst those that have worked in the industry for less than a year). This suggests that employers are not always ensuring that new employees are immediately made aware of the need to prepare for, or acquire, a CSCS card (or similar) and/or that young trainees are starting work/placements without the assurance that comes from having achieved such an accreditation. Within the South West there has been no real improvement in this area since 2015.

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

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

		SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
Total (411)		97	96	97	70	97
Age	16 to 19 years (17*)	82	82	91	39	85
	20 to 24 years (34)	100	96	97	67	97
	25 to 44 years (131)	98	97	99	74	98
	45+ years (94)	98	97	96	72	98
Length of time in construction	<1 year in construction (19*)	84	83	94	23	89
	1 to 2 years (9*)	100	91	86	58	97
	2 to 5 years (52)	96	96	97	71	96
	5+ years (196)	99	98	98	75	98
Contract-type	Employed directly (129)	97	95	96	68	96
	Self-employed (111)	97	98	99	74	98
	Agency (37)	97	100	100	0	97

Unweighted bases for 2018/19 South West in parentheses

Q12



In terms of the type of skill card or certificate held by construction workers in the South West the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (89%), as it was in 2015 (also 89%). Overall, 16% hold the CPCS (Construction Plant Competence Scheme) card/certificate and this proportion increases to 23% amongst workers aged 45+.

Figure 24: Type of skill card/certificate held

Base: All respondents

	SW 2018/19 %	SW 2015 %	SW 2012 %	UK 2018/19 %
CSCS (Construction Skills Certification Scheme) (GB)	89	89	91	85
CSR (Construction Skills Register) (NI)	0	1		3
CISRS (Construction Industry Scaffolders Record Scheme)	3	4	3	3
CPCS (Construction Plant Competence Scheme)	16	12	9	11
Other	4	4	6	4
<i>Unweighted bases</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>4048</i>

Q12

Carpenter/joiners and site managers are more likely to hold CSCS (Construction Skills Certification Scheme) (both 100%) than bricklayers (94%) or labourers/general operatives (89%).



Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 25 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Overall, within the South West, 6% of CSCS card holders have Red Trainee cards and 2% have Red Experienced worker cards; nearly a third of CSCS (34%) card holders have Green cards and/or Blue cards (30%). 7% have Gold cards for advanced craft/skilled workers or a Gold supervisor card.

Figure 25: Colour of CSCS/CSR cards held

Base: Where CSCS or CSR cards are held

	CSCS %
Red – Trainee	6
Red – Experienced worker card	3
Green – construction site operative card for general site workers	34
Blue – skilled	30
Gold – supervisor card	7
Gold – Advanced craft/skilled worker	7
Black – contracts manager card	5
Academically Qualified Persons Card	2
Professionally Qualified Persons Card	2
Apprentice Card	1
Other	2
Unsure	2
<i>Unweighted bases</i>	<i>246</i>

Q13/Q14



Younger workers are more likely to hold Red Trainee cards (21% of 16 to 19 year olds with a CSCS card), while those aged 20-24 and 45+ are most likely to hold Blue cards (33% in each case). Workers currently employed by an agency are more likely to hold Green cards (65%), compared with those employed directly or self-employed (27% and 31% respectively).

Card colours also vary significantly according to current occupation/trade, as Figure 26 summarises. Some significant differences include that labourers/general operatives are most likely to hold Green cards (76%).

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

Base: Where currently hold a CSCS card

	<i>Unweighted bases</i>	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold %	Black %
Labourer / Gen. Op.	42	2	2	76	12	2	0
Carpenter / Joiner	25	0	8	20	48	20	0
Bricklayer	29	7	3	21	48	17	0
Site manager	22	9	9	5	14	18	27



Construction qualifications held

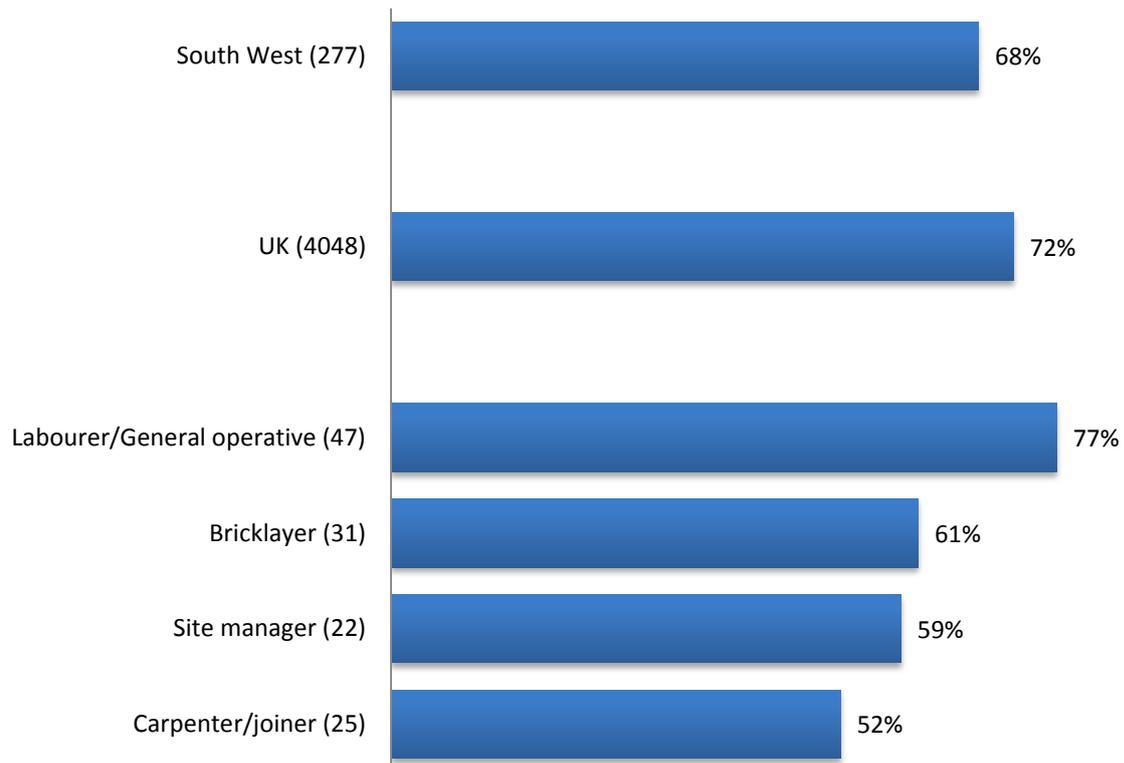
All workers were asked about the construction-specific qualifications they held after leaving full-time education and starting their first job in construction.

Overall, 68% of construction workers in the South West say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 63% in 2015 and 72% of all UK construction workers in 2018/19.

By current trade/occupation within the South West, the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (77%) and lowest among carpenter/joiners (52%).

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

Base: All respondents *caution: small sample base



Unweighted bases in parentheses Q15



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 South West construction workers reported holding some sort of construction-related qualification at the time of interview (74%) which is a slightly higher than reported in 2015 or the 2018/19 UK average (both 72%).

As Figure 28 summarises, the proportion of workers that hold any qualifications is lower than amongst those who have worked in construction for less than a year compared to 2015 (32%; compared with 54% in 2015) and lower among those aged 16-19 (53% cf. 85% in 2015).

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

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

		SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
Total (277)		74	72	73	49	72
Age	16 to 19 years (17*)	53	85	48	33	52
	20 to 24 years (34)	79	78	66	36	63
	25 to 44 years (131)	71	65	81	54	74
	45+ years (94)	80	77	65	54	76
Length of time in construction	<1 year (19)	32	54	56	9	34
	1 to 2 years (9)	67	62	45	26	52
	2 to 5 years (52)	75	75	65	42	63
	5+ years (196)	78	75	77	56	79
Current contract type	Employed directly (129)	81	73	72	43	75
	Self-employed (111)	70	74	75	60	73
	Agency (37)	59	59	71	0	49

Unweighted bases for 2018/19 South West in parentheses

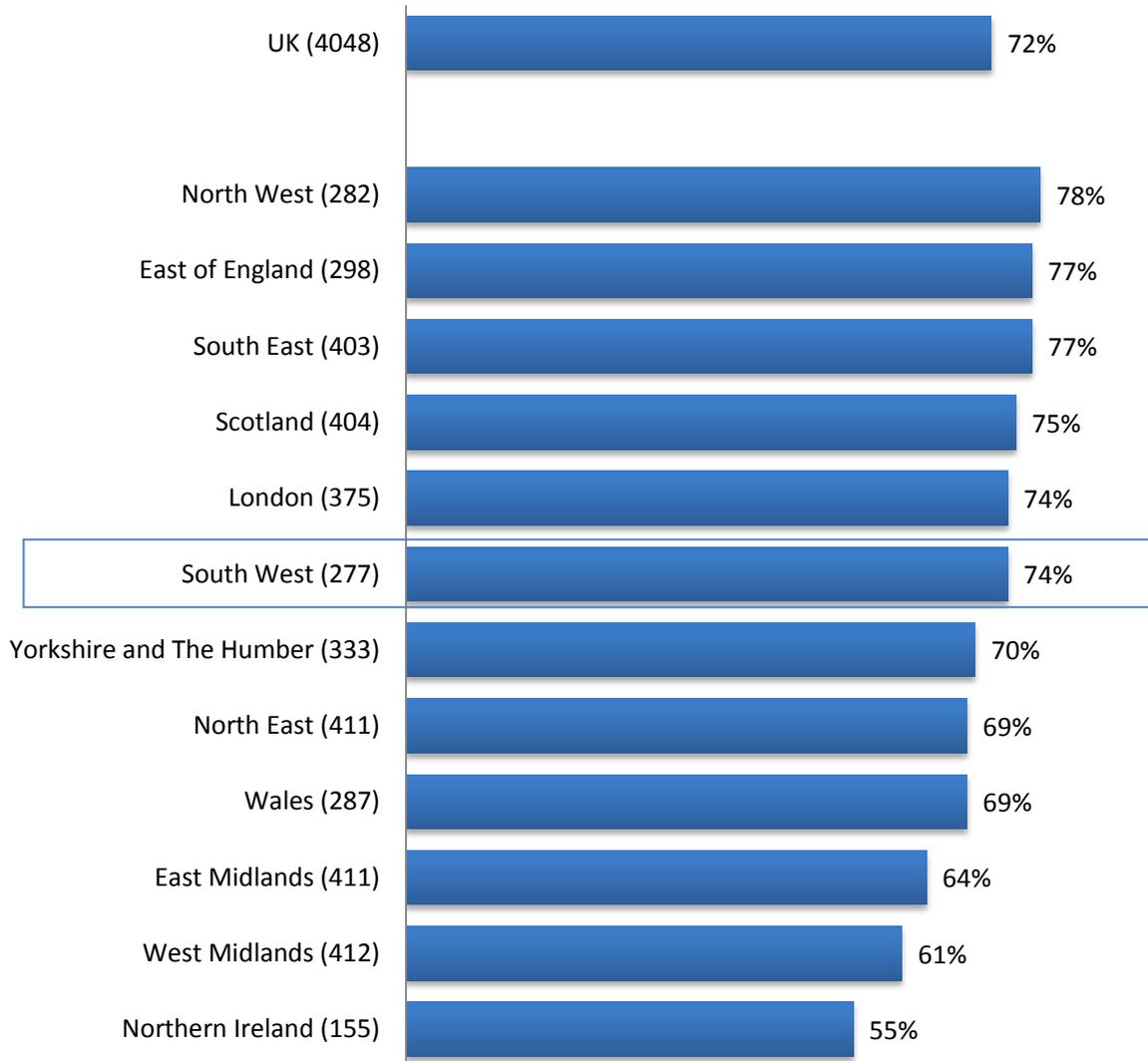
Q15/Q16



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

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

Base: All respondents



Unweighted bases in parentheses Q15/Q16

The likelihood that workers hold any qualifications also varies significantly by current job role. Site managers (91%), carpenters/joiners (88%) and bricklayers (87%) are more likely than average to hold qualifications. Meanwhile, only half of labourers/general operatives (49%) hold any.



Type of construction qualifications held

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

The qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (63%), a similar proportion to that in 2015 in the South West (62%) and higher than the UK 2018/19 average (58%). One in six South West construction workers with qualifications hold City & Guilds qualifications (17%), a lower proportion than in 2015 (21%) but higher than the UK 2018/19 average (14%). In the South West, one in ten (10%) of construction workers with qualifications hold an apprenticeship. This is half the proportion that held an apprentice in the South West in 2015 (21%) but is higher than the UK 2018/19 average (6%).

Figure 30: Main type of qualification held

Base: Workers with qualifications (valid responses)

	SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
NVQ/SVQ	63	62	71	46	58
City & Guilds	17	21	19	42	14
Apprenticeship	10	21	1	3	6
HNC/HND/BTEC Higher	7	4	0	4	6
Degree	1	3	0	1	7
Other	29	16	2	N/A	24
<i>Unweighted bases</i>	106	291	230	121	2122

Q15/Q16



Additional formal training

Self-assessment of basic skills needs

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

Overall, one in ten construction workers in the South West believe they would benefit from some form of training in basic skills (11% cf. 12% in 2015 and 28% in 2012). This is in line with the UK 2018/19 average (11%).

Maths is the area with the highest reported training need (7%) followed by reading (5%) and writing (4%).

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

Base: All respondents

	SW 2018/19	SW 2015	SW 2012	SW 2007	UK 2018/19
	%	%	%	%	%
ANY	11	12	28	18	11
Reading	5	7	17	10	5
Writing	4	4	16	8	5
Speaking English	3	4	12	5	6
Maths	7	3	14	7	5
<i>Unweighted bases</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>255</i>	<i>4048</i>

Q37

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

- Those who have worked in the industry for less than a year (32%);
- Carpenters/joiners (20%) and labourers/general operatives (17%)
- Those aged 25-44 are significantly more likely to believe they would benefit from training in Maths (11%)



Current study for additional construction qualifications

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

Workers employed directly (28%) are also more likely than those who are self-employed (12%) or working through an agency (11%) to be currently working towards a qualification. Of those who have no qualifications, currently 21% are working towards one. Figure 32 summarises these findings.

Figure 32: Proportion working towards additional construction qualifications

Base: All respondents

*caution: small sample base

		SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
Total (277)		19	15	15	16	15
Age	16 to 19 years (17*)	41	73	78	50	55
	20 to 24 years (34)	32	25	27	29	24
	25 to 44 years (131)	19	11	9	11	14
	45+ years (94)	10	3			6
Length of time in construction	<1 year (19*)	32	45	50	23	38
	1 to 2 years (9*)	33	50	64	26	31
	2 to 5 years (52)	33	28	38	67	25
	5+ years (196)	14	6	9	9	9
Contract type	Employed directly (129)	28	21	N/A	N/A	20
	Self- employed (111)	12	4	N/A	N/A	9
	Agency (37)	11	8	N/A	N/A	11
Highest qualification level	None (72)	21	11	N/A	N/A	16
	Level 1 (3*)	67	47	N/A	N/A	27
	Level 2 (82)	23	22	N/A	N/A	12
	Level 3 (35)	17	12	N/A	N/A	14
	Level 4+ (2*)	0	3	N/A	N/A	21

Unweighted bases for 2018/19 South West in parentheses

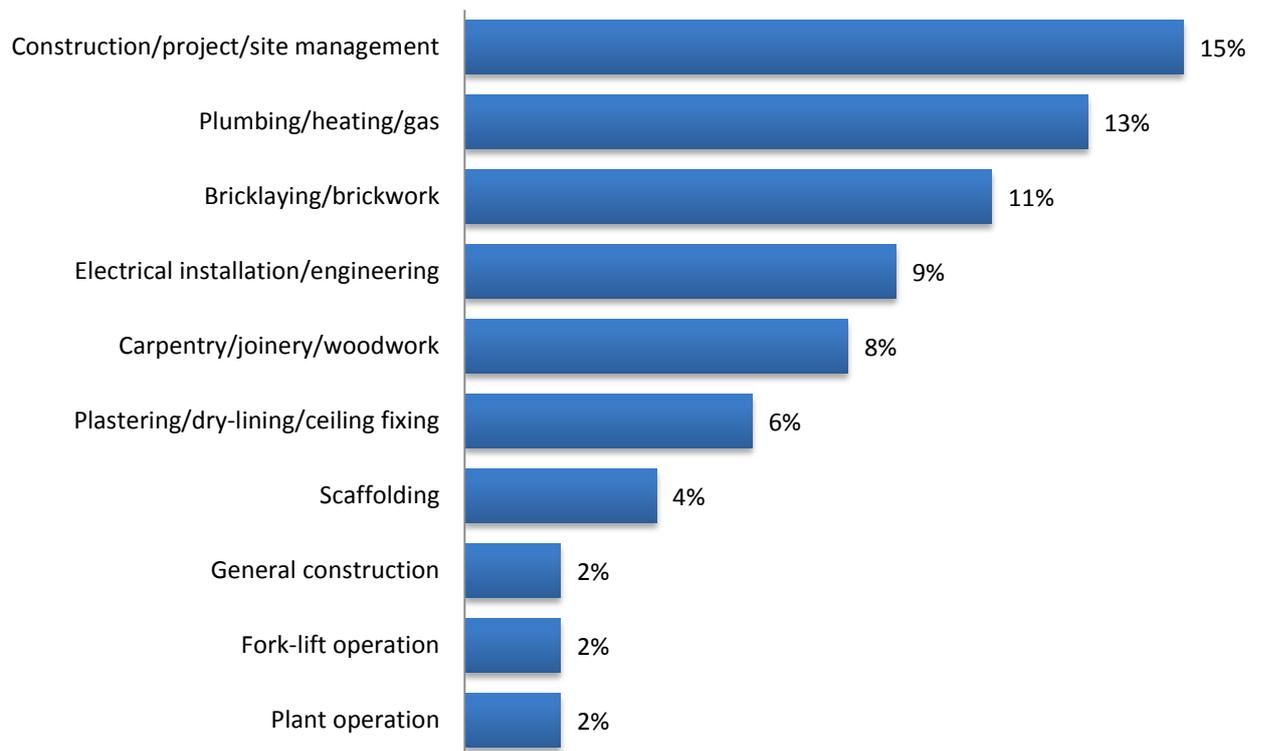
Q18



Of those who are currently studying for a qualification, the most popular type of qualification is an NVQ/SVQ (36%). In terms of the subject of the qualifications being worked towards, construction/project/site management (15%), followed by plumbing/heating/gas (13%) and bricklaying/brickwork (11%) are most popular, as Figure 33 illustrates.

Figure 33: Subject of qualification being worked towards

Base: Where working towards a qualification



Unweighted base = 53 Q19



Supervisory and managerial qualifications and training

As reported earlier, just under a third of all construction workers in the South West perform a supervisory or management role at their site (30%). Amongst those who do not currently perform supervisory/management roles, around one in five want to become a supervisor or manager in the future but have not done it before (22%) and a further 11% want to be a supervisor/manager and have done it before. Around a fifth of all workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (21%), while just under half are certain that they do not want to be (46%).

The likelihood that workers want to be supervisors/managers also diminishes amongst those that have worked in the industry for at least 5 years, with 54% of those having worked in construction for 5+ years not wishing to be supervisors/managers, compared with a South West average of 46%. Analysis by contract type reveals that those who are currently employed directly (30%) are more likely than those who are self-employed (17%) or those who work for an agency (17%) to want to be a supervisor/manager, but have not done it before.

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

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

*caution: small sample base

		Unweighted bases	Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
South West		187	22	11	46	21
UK		2824	24	6	51	20
Age	16 to 19 years	16*	25	0	38	38
	20 to 24 years	31	32	6	19	42
	25 to 44 years	90	28	11	44	17
	45+ years	50	4	18	68	10
Length of time inc construction	<1 year	17*	29	0	29	41
	1 to 2 years	8*	38	0	38	25
	3 to 4 years	49	35	4	33	29
	5+ years	112	14	17	54	14
Contract type	Employed directly	74	30	11	39	20
	Self-employed	83	17	14	52	17
	Agency	30	17	3	47	33
Highest qualification level	No Qualifications	62	19	2	53	26
	Level 1	3*	33	0	0	67
	Level 2	55	33	11	36	20
	Level 3	23	13	22	57	9



	Level 4+	0*	0	0	0	0
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One third of construction workers in the South West (33%; 34% across the UK) and four-fifths of those who have had some form of supervisory or management responsibilities (80% cf. 71% in 2015, 67% in 2012 and 81% across the UK in 2018/19) have received any formal training designed to improve managerial or supervisory knowledge or skills.

The proportion that has undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years than amongst those that have worked in the sector for less time (42%, cf. 6% 2-5 years, 22% 1-2 years and 16% less than a year). Construction workers employed directly are four times as likely as agency workers to have received formal training in this area (44%, compared with 11%). Nearly all site managers in the sample (95%) have received formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken, the proportions mentioning each type are summarised in Figure 35. SMSTS is most frequently mentioned (48%), with around two-fifths of those that have received training mentioning Site Safety Supervisors Courses (38%) and a third have received in-house training (31%). These three were also the most frequently mentioned in 2015.

Figure 35: Types of managerial/supervisory training undertaken

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



Unweighted base = 91 Q11



Overall skill levels

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

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

Just under one in five of the workforce (18%) hold a skill card/certificate, but have no other construction qualification, this is a lower proportion than in 2015 (23%) and 2012 (42%).

Figure 36: Qualification status summary

Base: All respondents

	SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	99	99	98	82	99
Holds a formal construction qualification or a skills card/certificate	99	98	98	78	98
Holds a skills card/certificate	97	96	97	70	97
Holds a skills card/certification but no other qualification	18	23	42	31	22
Working towards a qualification	19	15	15	16	15
<i>Unweighted bases</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>255</i>	<i>4048</i>



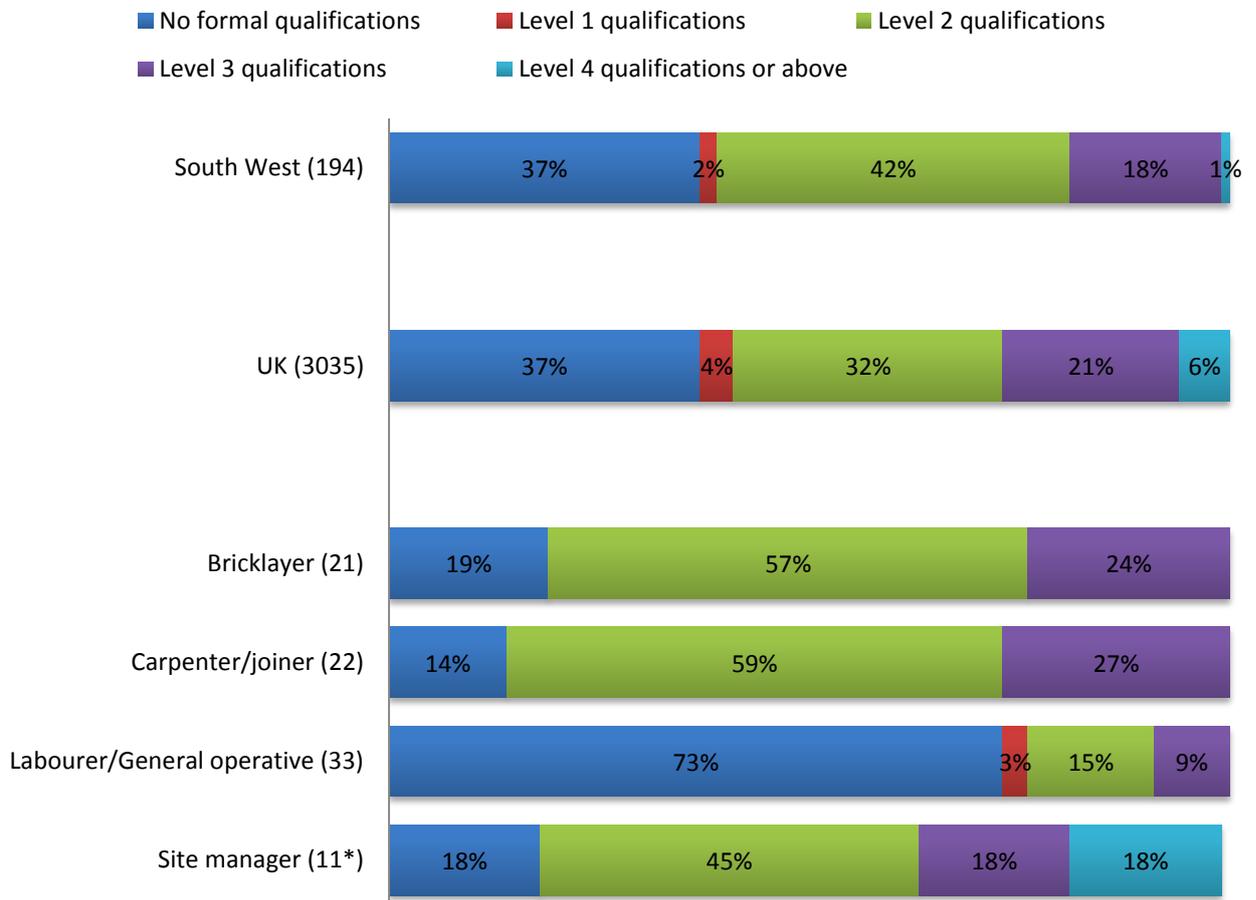
Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. Figure 37 summarises construction workers' highest level of qualification, overall and by occupation, based on where the information provided enabled a level to be assigned (30% of all South West construction workers did not provide sufficient information).

Overall, three in five construction workers in the South West providing a response have qualifications equivalent to Level 2 or above (61%, cf. 65% in 2015; 59% across the UK in 2018/19).

By occupation, only site managers (providing a response) hold qualifications at Level 4 or above (18%). Labourer/general operatives are most likely to not hold any formal qualifications (73%).

Figure 37: Current qualification level, by occupation

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



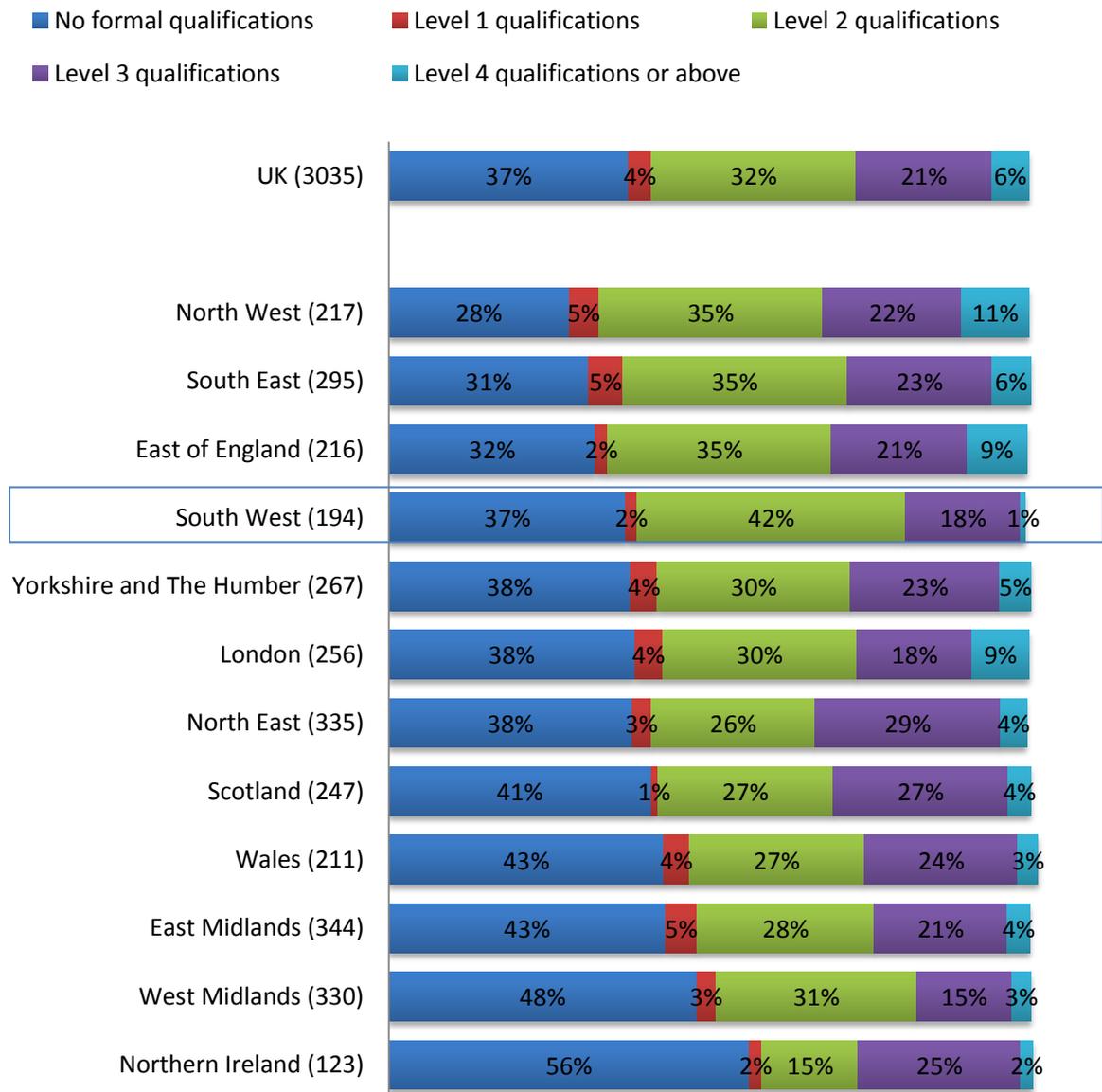
Unweighted bases in parentheses Q15/Q16



Analysis by region/nation reveals that while the proportions that hold qualifications at Level 1 or at Level 4 and above are generally quite similar, the proportions that have Level 2 or 3 qualifications and no qualifications vary quite considerably. These variances are summarised in Figure 38, which highlights that the construction workforce in the South West hold more level 2 qualifications than average (43% cf. 32%) but fewer level 3 and 4+ qualifications (18% cf. 21% and 1% cf. 6% respectively).

Figure 38: Current qualification level, by region/nation

Base: All respondents who provided a valid response



Unweighted bases in parentheses

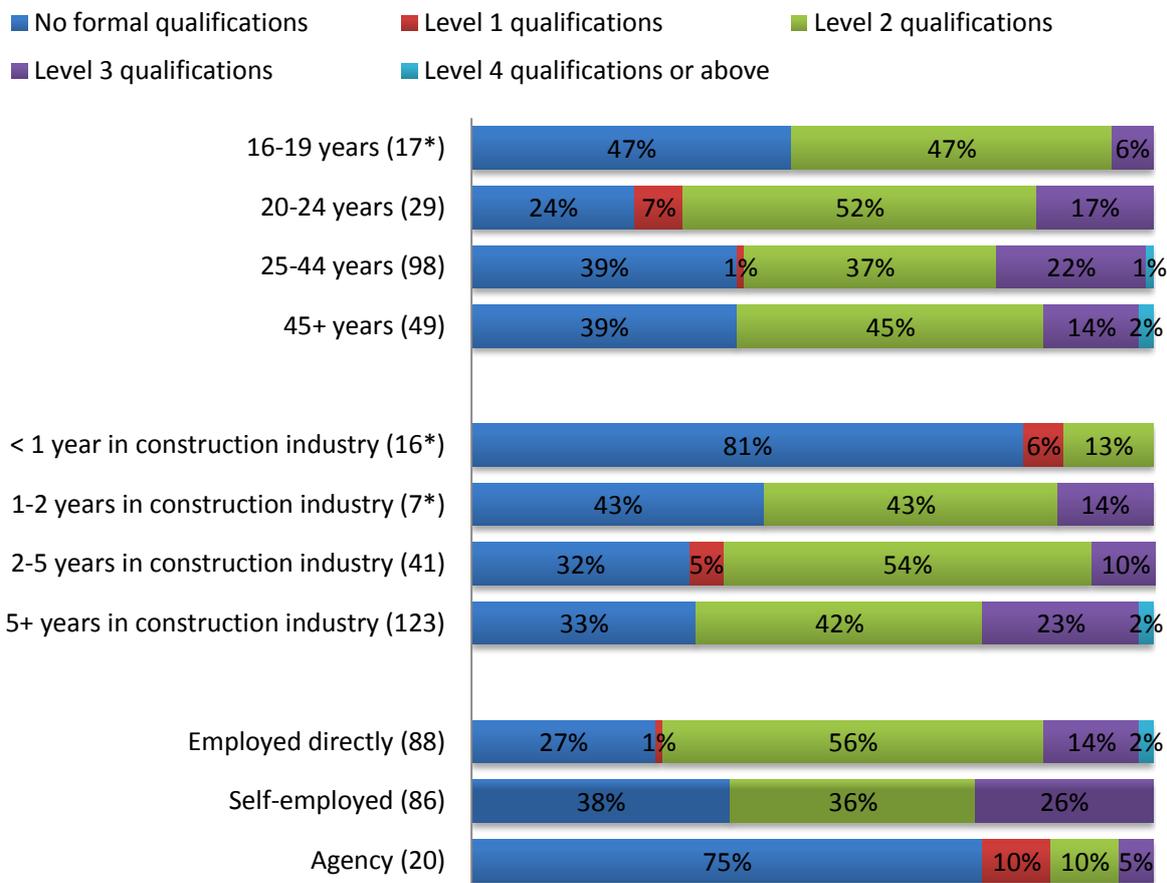


Looking at other sub-groups of construction workers, workers that have worked in construction for 5+ years are more likely than those having spent less time in the industry to have qualifications at Level 3 or 4+ (25%, compared with 8% that have less than 5 years' experience).

In terms of contract type, agency staff are more likely to have no formal qualifications compared to those employed directly and those who are self-employed (75% cf. 27% and 38% respectively). Those who are employed directly are the most likely group to have level 2 qualifications (56% cf. 36% self-employed and 10% agency).

Figure 39: Current qualification level, by other key variables

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



Unweighted bases in parentheses Q15/Q16



Geographic mobility

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

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

Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. Within the South West the most likely reason for working in a region/nation is because they grew up there/have always lived there (68%), which is the second most popular reason in the UK as a whole (43%). The second most popular reason in the South West is that their employer sent them there (17%), which is far less prominent than in the UK as a whole (51%).

Figure 40: Reasons for choosing to work in current location

Base: All respondents

	SW 2018/19 %	SW 2015 %	UK 2018/19 %		SW 2012 %
Employer sent you here	17	22	51	Employer sent me	17
You grew up here/have always lived here	68	64	43	Family	63
Family reasons	11	9	5		
Came to the area to take up this or another job	3	4	3	More regular opportunities	6
There are more jobs available in this area	3	3	5	More jobs here	6
Construction work is better paid in this area	3	4	3	Better paid jobs	4
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	4	3	2	Prefer living here	17
Better promotional prospects in this area	1	-	1	More chance of promotion	-
<i>Unweighted bases</i>	<i>277</i>	<i>494</i>	<i>4048</i>		<i>407</i>

Q28

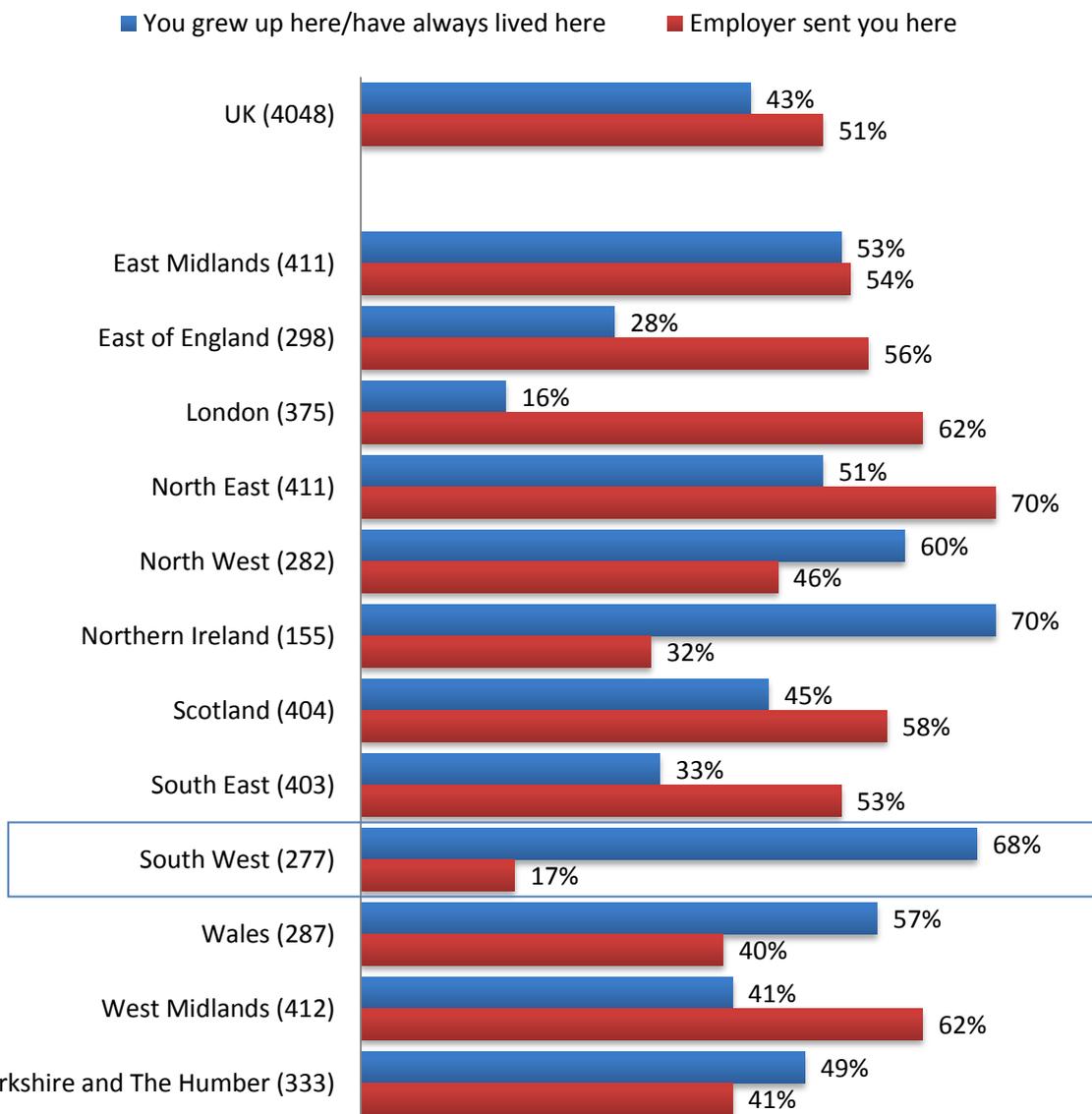


Younger workers (84% of 16-24 year olds) are significantly more likely to state that they work in the region because that's where they have always lived/grew up, while those aged 25-44 are significantly more likely than those in other age groups to state that their employer sent them there (23%).

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

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

Base: All respondents



Unweighted bases in parentheses Q28



Just over two-fifths of all workers in the South West have worked within this region for their entire construction career (43%), compared with a half of workers in 2015 (50%) and 2012 (48%). A further 40% have remained in this region most of the time which means the majority of all workers has remained in the South West for all or most of the time (83%).

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

Base: All respondents

	SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
All of your time	43	50	48	36	44
Most of it	40	33	34	40	33
Around half your time	6	7	9	8	9
A small proportion of your time	8	6	6	13	10
Only on this job (this is the first site you've been to in this region/nation)	2	3	1	3	2
Don't know	0	2	1	<0.5	1
<i>Unweighted bases</i>	<i>277</i>	<i>494</i>	<i>420</i>	<i>255</i>	<i>4048</i>

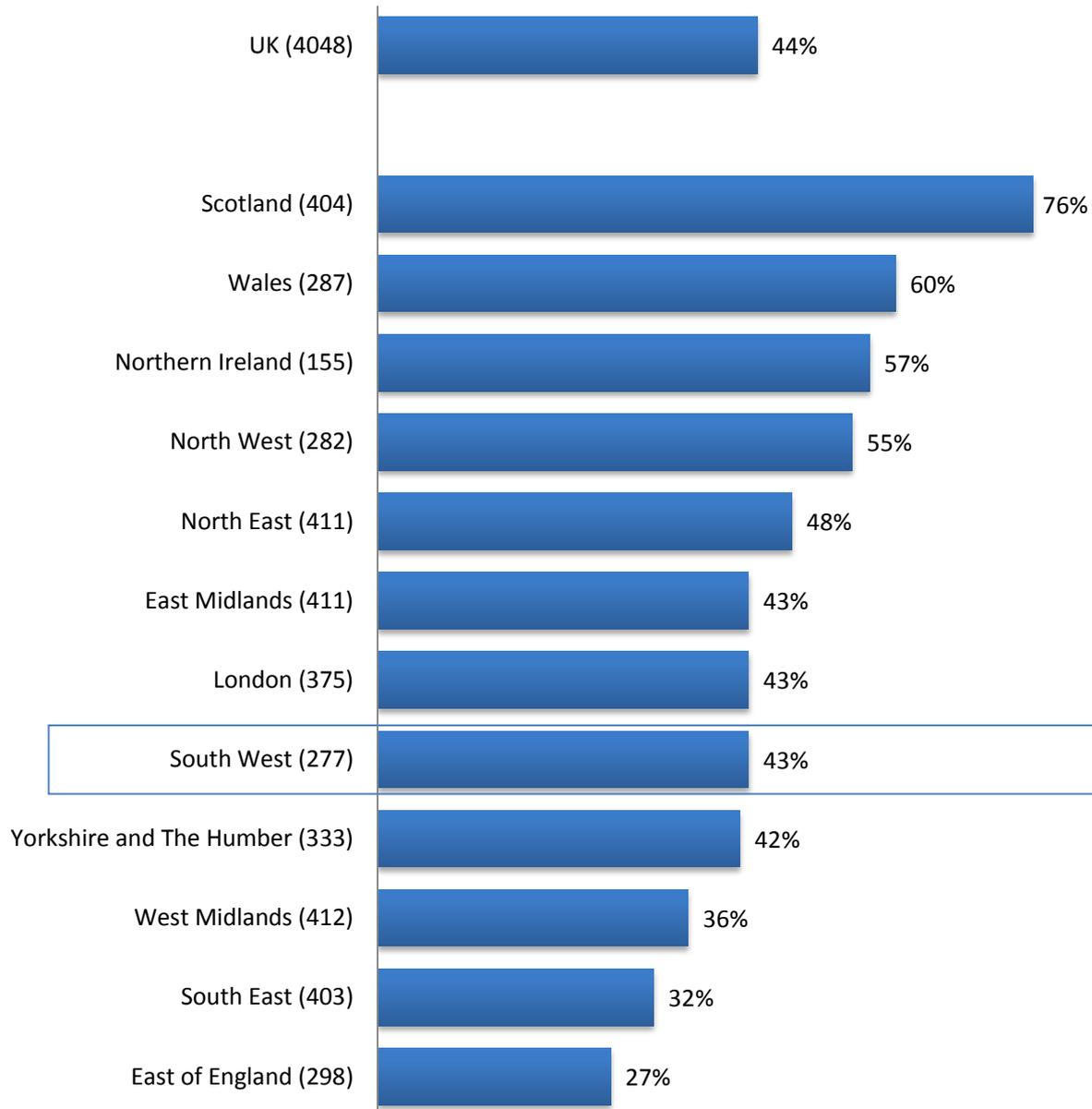
Q26/Q27



The proportion of construction workers in the South West that have spent all of their time in the region is significantly higher amongst younger workers (71% of 16 to 24 year olds) and significantly lower amongst those aged 45+ (28%).

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

Base: All respondents



Unweighted bases in parentheses Q26



The proportion of workers that reported their employer operates (takes on construction contracts) only within particular regions/nations, nationwide or internationally is shown in Figure 44. In the South West, just over a third (37%) indicate their employer operates nationwide, with three-fifths (60%) stating that their employer operates in particular parts of the UK including the South West, while 2% are unsure.

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

Base: All respondents

*denotes less than 0.5%

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

Q25



Region/nation worked in before current site

Thinking about the last construction site they worked on before this one, in the majority of cases, workers' last sites were in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 45 illustrates. Construction workers in the South West are amongst those most likely to state that their last site was in the same region (81%), and the proportion is higher than in 2015 (76%).

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

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

Region/nation of last site	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands (EM)	79	2	*	1	0	0	0	4	*	0	16	4
East of England (EE)	4	52	6	1	0	0	0	11	1	*	1	*
London (GL)	4	31	73	2	*	1	*	14	4	*	1	3
North East (NE)	0	*	0	90	0	1	*	0	0	*	1	2
North West (NW)	1	0	*	2	91	1	0	1	1	*	4	3
South East (SE)	1	11	16	0	0	1	*	62	8	1	2	*
South West (SW)	1	1	*	0	0	0	*	3	81	4	1	1
West Midlands (WM)	7	1	1	0	*	1	1	3	*	0	71	2
Yorkshire & Humber (YH)	3	0	1	2	2	1	0	*	*	0	1	83
Northern Ireland (NI)	0	0	1	0	1	93	1	0	0	0	0	0
Scotland (SC)	0	*	1	2	1	2	98	0	*	*	*	1
Wales (WA)	0	*	*	0	2	0	0	1	2	88	1	0
Republic of Ireland	0	0	*	0	0	0	0	0	0	0	0	*
Other parts of Europe	0	0	0	0	*	0	0	0	0	0	1	0
Outside of Europe	0	0	0	0	1	1	0	0	0	0	0	0
Other / Unsure	1	2	1	*	1	0	0	1	1	6	1	*
Unweighted Bases	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, three-quarters of all construction workers in the South West were living in the South West when they started their construction career (76%, unchanged from 2015). This compares with other regions/nations where the proportion is significantly higher (Scotland at 96%; Northern Ireland at 95%) and those where the proportion is significantly lower (East of England at 44%; South East at 51%). Figure 46 summarises this data.

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

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

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

Q40



Thinking next about where workers studied for their first construction qualification, Figure 47 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that, while there are great variations by region/nation, three-quarters of construction workers in the South West (75%) achieved their first qualification there.

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

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

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

Around one in twenty construction workers in the South West are travelling into the region for work from another region/nation in which their current residence is based (6%) and this is a lower proportion than in previous surveys (15% in 2015 and 18% in 2012).

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

Base: All respondents who provided a valid response

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

Unweighted bases for 2018/19 in parentheses

Q52/Q54



The extent to which construction workers live in the same region/nation in which they work is further illustrated in Figure 49. Nearly all construction workers in the South West are currently living in the same region as the site on which they work (94%), which compares with 85% in 2015. Those travelling from a different region are split between Wales, the West Midlands, and the South East (all 2%).

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

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

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

Q52/Q54

Furthest distance worked in last 12 months

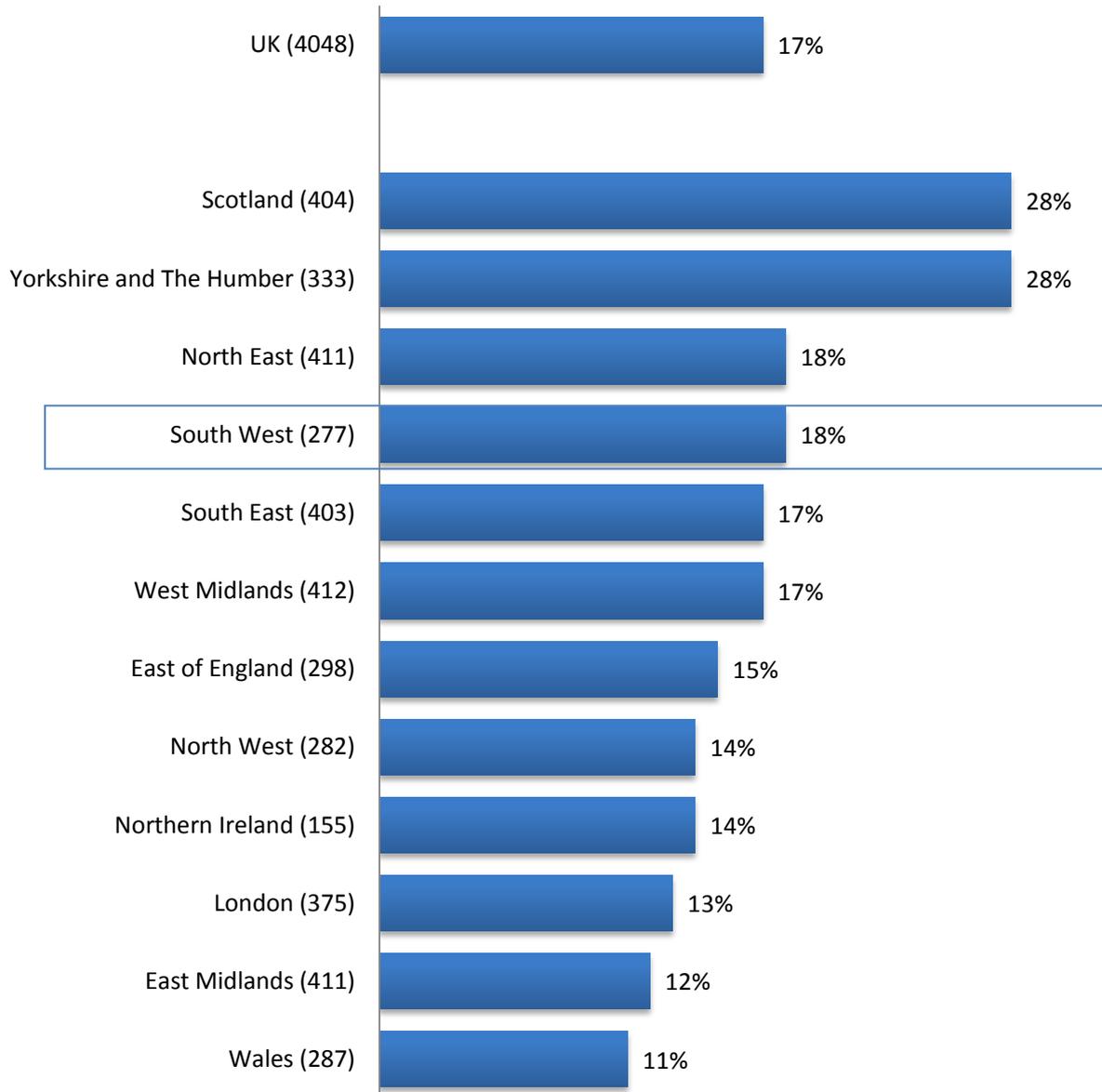
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within the South West, around a quarter of construction workers have worked no more than 20 miles away (28%) and nearly a further third have worked between 21 and 50 miles away (31%). The average maximum distances travelled to work by South West construction workers in 2018/19 have decreased since 2015 when 16% had never worked no more than 20 miles from their home (but 31% had travelled a maximum of 21 miles-50 miles). This leaves around two in five that have worked more than 50 miles away from their permanent home (40%), with around one in four that have worked between 51 and 100 miles away (23%) and one in six that have worked more than 100 miles away (18%).

Compared with workers in other regions/nations, workers based in the South West (18%) are in line with the UK average (17%) for travelling more than 100 miles from their permanent home to work in the last 12 months.



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

Base: All respondents



Unweighted bases in parentheses Q29



Use of temporary accommodation

Nationally, 1 in 20 (5%: 6% in 2015) construction workers reported that they were currently staying in temporary accommodation while working at their site. By region/nation, the South West proportion is towards the lower end of the range (3%), with the lowest proportion in the North East (1%), and the highest in London (10%).

Figure 51: Percentage of workers in temporary accommodation

Base: All respondents

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

Q41/Q42

Journey distance to work

Within the South West, the average (mean) distance from workers' current residences (taking into account temporary residences) to their current site was 12 miles, which is less than the average of 24 miles reported in 2015, which in turn was less than the average of 26 miles reported in 2012. The South West mean compares to a mean of 18 miles across the UK.

Over three-fifths (63%) travelled less than 10 miles from their current residence to the site whilst 14% travelled between 10 and 19 miles, 22% travelled between 20 and 49 miles and 1% travelled between 50 and 99 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (43% of all construction workers in the South West) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 3% expect to work for up for 2 weeks; 13% expect between a month and 3 months; 18% between 3 and 6 months; 13% between 6 months and a year; and 18% expect to still be working for their current



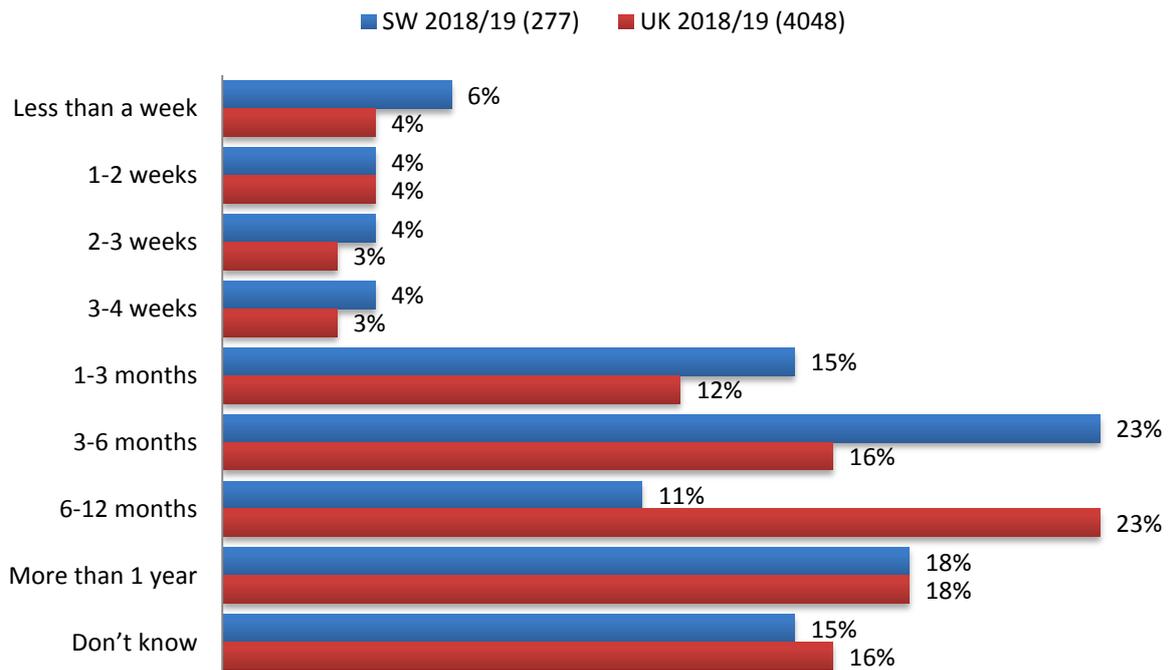
company/agency in more than a year’s time. Over a third of the temporary workers in the region did not know how much longer they expect to be working for their current company/agency (36%; 38% across the UK).

In order to get a measure of workplace stability, 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.

Just under one in five construction workers in the South West (18% cf. 24% in 2015) do not expect to work on that site for more than a month, including 6% that only expect to be there for a week or less. Around half anticipate being on site for more than a month, but less than a year (49%), while around one in five expect to stay on that site for a year or longer (18% cf. 27% in 2015). However, in around a sixth of cases (15% cf. 23% in 2015 and 20% in 2012) workers did not know how much longer they could expect to be on site, indicating that a significant minority of construction workers are living with a certain amount of uncertainty and insecurity.

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

Base: All respondents



Unweighted bases in parentheses
Q24

The youngest workers, aged 16-19 are more likely to be unsure of how much longer they can expect to work for (24% don't know). (*Caution: small sample base of 17)

Amongst the various trades/job roles, a similar proportion of labourers/general operatives (17%), bricklayers (16%) and site managers (14%) expect to work at that site for a year or more. Less than one in ten (8%) carpenters report that they expect this to be the case.



Expected next site location

More than three quarters (78%) of construction workers in the South West are confident that, when they finish this job, they will get a job that allows them to travel from their permanent home to work on a daily basis. This is a higher proportion than in previous surveys (cf. 73% in 2015 and 72% in 2012). The remaining fifth of workers are sure that this will not be the case (5%); that it depends where the work is (12%); or that they don't know (5%).

Construction workers in the South West are below the UK average in this respect (84%).

Construction workers who have worked in construction for the longest period of time are more likely to be confident of this (80% of those who have worked in the industry for 5+ years, cf. 63% of those who have worked in construction for under a year). By trade/occupation, labourers/general operatives are the least confident (70%).

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. 64% of construction workers in the South West that do not expect to be able to commute daily to their next job expect to remain in the region for their next job. The remainder are evenly split between the East Midlands, London and the North East (7%).

Figure 53: Expected location of next site/job

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

* denotes less than 0.5%

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



Q31

Sub-sector and sector mobility

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

Sub-sector mobility

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

As in 2015, the vast majority of construction workers in the South West have worked on new housing (81% cf. 83% in 2015). There is a reverse in the downward trend in the proportions of construction workers that have been working on other types of projects that was seen in 2015.

Overall, less than a quarter of all construction workers have only worked on one project type (23%), a decrease on 2015 (47%). This suggests some decreased stability in the sector in terms of the sub-sectors in which work is available.

Figure 54: Type of projects spent significant periods on

Base: All respondents

	SW 2018/19 %	SW 2015 %	SW 2012 %	SW 2007 %	UK 2018/19 %
New housing	81	83	76	81	79
Housing repair and maintenance including extensions/loft conversions	56	36	46	42	46
Commercial work such as shops, office, pubs etc	53	34	51	49	51
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	53	30	48	49	45
Public non-housing work such as schools, sports facilities, landscaping	60	33	52	55	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	40	23	35	22	31
ONE TYPE ONLY	23	47	28	23	30
TWO TYPES	14	15	16	18	16
THREE TYPES	13	11	15	22	14
FOUR TYPES	14	8	13	16	12
FIVE TYPES	17	8	13	15	13
SIX TYPES	18	10	15	5	14



<i>Unweighted bases</i>	277	494	420	255	4048
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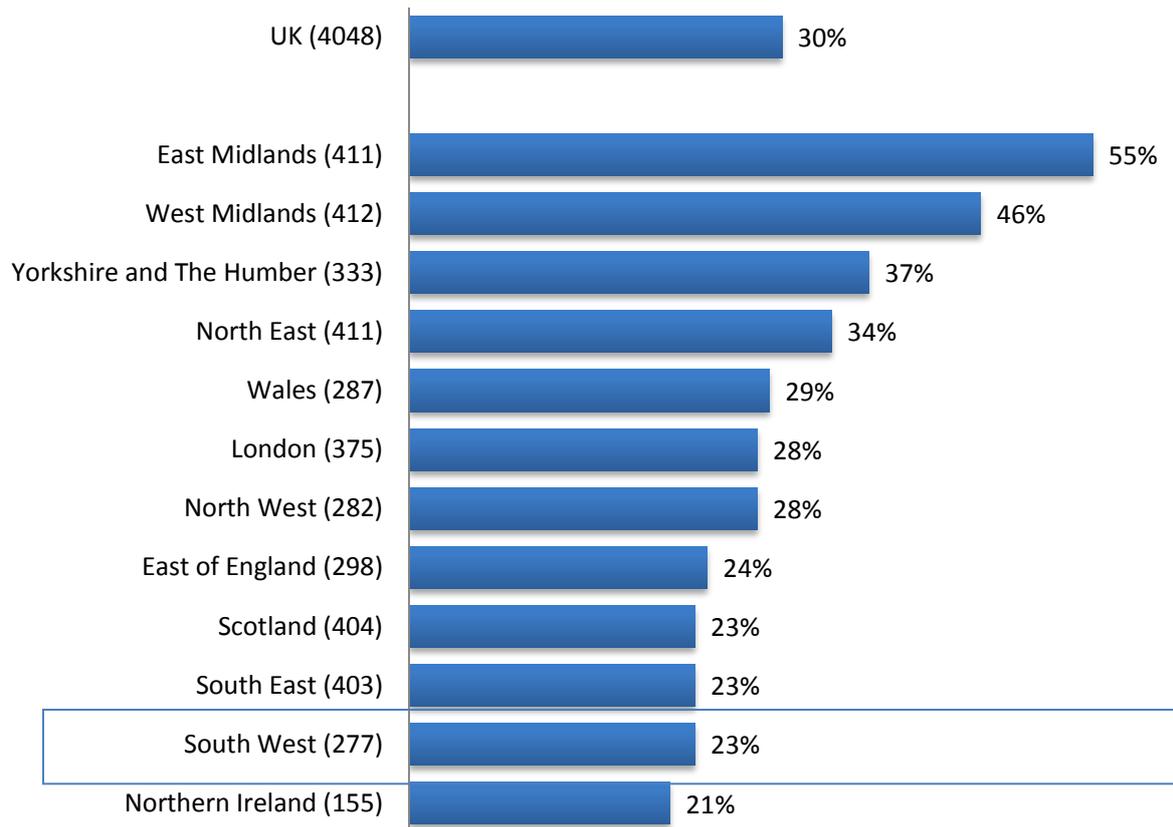
Q3/Q4



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

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

Base: All respondents



Unweighted bases in parentheses Q4



The likelihood that workers have worked only on one project type declines as age increases, (from 53% of 16 to 19 year olds to 14% of 45+ year olds). By current trade/occupation, bricklayers are more likely to have worked on all 6 project types (32%).

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

Base: All respondents *Caution: Small sample base

	Unweighted bases	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Bricklayers	31	29	10	10	6	13	32
Carpenters/joiners	25	20	12	24	8	24	12
Labourers/general operatives	47	26	17	2	26	13	17
Site manager	22	36	18	5	14	14	14

Leaving the sector

In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Overall, just under three-quarters (73%) felt it was definite or very likely that they would still want to, which is in line with the UK average (74%). This included, within the South West, half of construction workers who say they definitely will be (50%) and just under a quarter who say it is very likely (23%). An additional 15% believe it is quite likely and 3% consider it unlikely. Just 1% say they definitely won't be and a further 4% hope to be retired by then, while 4% don't know.

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 11% of construction workers aged 45 and over and 67% of those aged 60 and over. The proportion that felt they definitely would still want to work in the construction sector in five years is highest amongst the second youngest age group (59% of 20-24 year olds).



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

Base: All respondents

*Caution: small sample base

	SW 2018/19 %	UK 2018/9 %	Age			
			16 to 19 %	20 to 24 %	25 to 44 %	45+ %
Definitely will be	50	48	35	59	48	52
Very likely	23	26	18	15	27	20
Quite likely	15	11	41	12	15	12
Quite unlikely	1	2	0	0	1	1
Very unlikely	3	2	0	0	2	4
Definitely will not be	1	1	6	3	0	0
Hope to be retired	4	4	0	0	2	11
Don't know	4	5	0	12	5	0
<i>Unweighted bases</i>	277	4048	17*	34	131	94

Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 51% believe they will definitely want to be working in the construction sector, 24% believe it is very likely they will want to be working in the construction sector and 16% believe it is quite likely they will want to be working in the construction sector. Only 4% (excluding those who hope to be retired) think on any level that they will not want to be working in the construction sector in 5 years' time which is less than in 2012 (8% in 2015 and 13% in 2012).

Overall, as above, 4% of all construction workers felt it was unlikely that they would still want to work in the construction sector in five years' time. These workers were asked the reasons why. They were most likely to cite the fact that work outside of construction might: be more interesting/bored of current role; be better paid; and/or provide more suitable hours/conditions (each 18%, 2 respondents in each case). Other reasons, each cited by 1 respondent, included expectations of using skills/abilities better, the perception that work will be easier to find or provide more security as well as the desire for less physically demanding work.



The South West construction workforce 2018-19 summary

Across the wide range of issues covered within the 2018/19 survey there are indications of more flexible, adaptive working patterns across the UK construction workforce and this is reflected in some aspects of the South West. The South West has the highest proportion of construction workers employed on a temporary basis across all regions/nations (43% cf. 28% UK average). This represents a substantial increase compared to 2015 (18%). There has been a decrease in the proportion of workers employed directly by companies, from 67% in 2015 to 47% in 2018/19, while there has been an increase in proportion that are self-employed (from 26% in 2015 to 40% in 2018/19) and those working for an agency (7% in 2015 compared to 13% in 2018/19).

Workers in the region, on average, travel shorter distances to their current site than the UK average and the distance they travel has decreased since 2015 from 24 miles to 12 miles. The South West is in line with the UK average in terms of the proportion which has travelled more than 100 miles from their permanent home to work in the last 12 months (18%, compared with a UK average of 17%).

South West construction workers are most likely to report that they work at their current site because they have always lived in that area (68%). The second most likely reason is that their employer sent them there (17%). Just over four in five workers (83%) report that they have spent all or most of their time working in the South West, compared to a UK average of 77%. This is further highlighted by the fact that a high proportion of South West workers in 2018/19 report that their last site was also in the South West (81% cf. 76% in 2015).

Longer term, over the course of careers in construction, South West workers are mid-range compared with those in other regions in their propensity to have remained in the same region in which they started their careers (76%, compared with 96% in Scotland and 44% in the East of England) or in which they obtained their first qualification/training in construction (75%), compared with 96% in Scotland and 41% in the South East).

The level of uncertainty among temporary workers is in line with the average across the UK; 36% in the South West do not know how long they expect to continue with their current employer/agency compared with a UK average of 38%. This is mirrored in construction workers' expectations of the length of time they expect to work at their current site during the current phase, with 15%, in both the South West and the UK as a whole, not knowing how long that would be. However, it should be noted that this is an eight-percentage point decrease in the South West compared to 2015 (23%).

Compared with 2015, South West workers were more likely to be confident that their next job will be at a location that will allow them to travel to work from their permanent home on a daily basis (78%, compared with 73%).

South West construction workers are more likely to have worked in more than one trade than they were in 2015 (46%, compared to 36% in 2015) and less likely to have worked in just one project area (23%, compared to 47%). This is in line with the UK trend of a widening range of experience.



In terms of skills and qualifications it is encouraging to note that the vast majority of South West construction workers continue to hold some form of skill card or certificate. The South West proportion is in line with the UK average (both 97%). There are similar levels of qualified workers in the region compared with the UK (74% cf. 72%) and a slightly higher proportion of workers in the South West working towards a construction qualification (19%) compared to the UK average (19% cf. 15%).

Just over one in ten construction workers in the South West in 2018/19 believe they would benefit from training in basic skills (11%), a small decline from 2015 (12%) but in line with this year's UK average (11%).



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