

Workforce Mobility and Skills in the UK Construction Sector 2015

South East Report





Study prepared by BMG Research from a commission by CITB.

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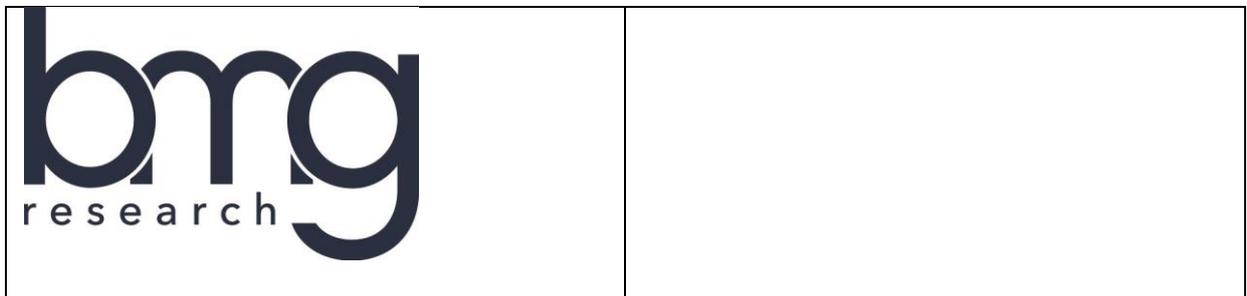




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Executive summary

Introduction

- CITB commissioned BMG Research to undertake the 2015 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2012, 2007 and 2005. Face to face interviews were conducted with 4771 construction workers undertaking manual roles on sites across the UK and 439 interviews were conducted with construction workers in the South East region/nation.

Profile of the sample

- Half of construction workers interviewed in the South East are aged 35 and under (50%), which is a higher proportion than compared with the UK population as a whole (37%), but broadly similar to the UK average in the survey (47%). Just 4% of construction workers are aged 60 or over.
- Overall 90% of construction workers in the South East are of White origins, slightly lower than the proportion in 2012 (95%) and the UK average in 2015 (94%). Workers of BME origins make up 8% of the sample in the South East, an increase since 2012 when 3% of workers were of BME origin. This compares with 4% of the UK sample and 7% across the 16 to 64 aged South East population.
- By trade/occupation, the highest proportion of the South East sample is accounted for by labourers/general operatives (19%), followed by bricklayers (13%) and site managers (9%). Compared with 2012 there has been a decline in the proportion that are carpenters/joiners (7% cf. 17% in 2012).
- Almost 3 in 10 of all those interviewed in the South East perform a supervisory or management role on their site (29%), higher than the national proportion (25%).
- Just over half of construction workers interviewed for the survey are employed directly by a company (53%), which represents a significant increase compared with 2012 (30%). At the same time, the proportion of self-employed workers has fallen significantly since 2012 (from 61% to 38%), while the proportion of workers working for an agency has remained stable (8% in both 2012 and 2015).
- One in six construction workers in South East (18%) are employed on a temporary, rather than permanent basis. This proportion is slightly lower than the UK average (23%). By occupation, the proportion is highest amongst labourers/general operatives (28%) and plant/machine operatives (27%).
- Construction workers in the South East work an average of 45 hours per week, which includes a quarter that work more than 50 hours per week (25%). This is in line with the UK average (23%).



Work history

Time in the sector

- More than a quarter of all South East construction workers have worked in the industry for at least 20 years (28%), and half have worked in the industry for at least 10 years (50%), compared to a higher UK average (56%).
- Nearly two thirds of construction workers in the South East have only ever worked within the construction industry (65%), slightly fewer than the UK average (70%). This includes over half who have worked pretty much continuously, without spells out of work (52%).

Previous non-construction jobs

- Amongst the quarter of construction workers in the South East that worked in another sector (25% of all respondents) before starting work in construction, the sectors worked in beforehand are most likely to be either wholesale/retail (25%) or accommodation and food service activities (16%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trades occupations (31%).

Occupational switching within the construction sector

- Just over a third of all construction workers in the South East have worked in more than one construction trade or occupation whilst working in the construction industry (37%), significantly more than in 2012 (27%) and slightly higher than the UK average (34%). As one would expect, the proportion that has worked in more than one role is significantly higher amongst those aged 45+ (51%).
- Workers are most likely to have previously worked as a labourer/general operative (35%); while 1 in 8 have worked as a carpenter/joiner or a bricklayer (each 12%).
- Thinking about their future plans in the construction sector, almost four fifths of construction workers in the South East would like to carry on in the same trade or occupation (79%), while 1 in 9 would like to change their trade/occupation (11%) and a further 4% would like to leave construction altogether. The proportion that wants to carry on as they are is the same as the UK average (79%), however slightly more workers in the South East would like to change their trade/occupation (11% cf. 9% across the UK).
- The most popular occupation that construction workers in the South East would like to change to is site manager (19% of those who would like to change), followed by electrician (13%).
- In nearly three quarters of cases where South East construction workers would like to change trade/occupation they believe they will require further training or qualifications in order to do so (73%). This is a lower proportion than the UK average (77%).
- The main reason for wanting to change trade/occupation is the belief that workers will be better paid (67%), while around a third would like to make better use of their skills or abilities (35%) or to have more interesting work or a change (31%).



Qualifications and skills

Skills cards/certificates

- The vast majority of all construction workers in the South East, as across the UK as a whole, hold some form of construction skill card or certificate (98% cf. 96% in 2012 and across the UK in 2015).
- Younger workers (89% of 16-19 year olds) and those who have worked in construction for less than a year (92%) are less likely to hold a skill card/certificate, although there has been an increase in the proportion of these workers holding cards/certificates since 2012 (previously 68% and 84%, respectively).
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (91% in the South East and across the UK).
- Card colours vary by age and particularly by occupation; labourers/general operatives are most likely to hold Green cards (74%); dryliners (53%) are most likely to hold Blue cards; plumbers (45%) and site managers (31%) are most likely to hold Gold skill cards.

Construction-specific qualifications

- Overall more than three quarters of construction workers in the South East say they had no formal qualifications when they first started working in the construction industry (77%). This compares with a UK average of (75%).
- Compared with just under a quarter of construction workers in the South East that did have qualifications when they first started working in construction, overall, nearly three fifths of all construction workers in the region reported holding some sort of construction related qualification at the time of interview (58% cf. 62% in 2012 and a UK average of 63%).
- 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 (22%) and those employed by an agency (29%).
- By trade/occupation, scaffolders (86%), plumbers (84%), site managers (79%) and electricians (76%) are most likely to hold qualifications, whilst labourers/general operatives (26%) are least likely.
- The qualifications most likely to be held by construction workers in the South East are NVQ/SVQ qualifications (67% of those with qualifications) and this is a similar proportion to that reported in 2012 (68%) and the UK average (66%). Around 1 in 6 construction workers in the region with qualifications hold City & Guilds qualifications (17% in 2015 cf. 17% in 2012 and 20% across the UK in 2015). A quarter of construction workers with qualifications now hold an apprenticeship (25%), which is a significant increase compared with 2012 when just 1% did, and significantly higher than the UK average (13%).



Basic skill needs

- Overall 1 in 7 construction workers in the South East believe they would benefit from some form of training in basic skills (14%), compared with a higher proportion of 1 in 5 in 2012 (20%). The proportion in the South East matches the UK average (14%).
- In terms of the type of training required, 8% believe they would benefit from training in speaking English, 6% from training in reading and writing, and 3% from training in maths.

Current study for qualifications

- One in ten construction workers in the South East are currently working towards any formal qualifications relevant to the construction industry (10% cf. 9% in 2012 and a UK average of 12%). This proportion is significantly higher amongst 16-19 year olds (55%) and amongst those who have worked within the construction industry for less than a year (24%).
- Amongst workers with no qualifications, 10% are currently working towards one.
- Qualifications equivalent to Level 2 (34%) and Level 3 (26%) are most common among those currently working towards a qualification.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role more than half are certain that they would not like to do so (54%; 53% across the UK), while more than a quarter would like to do so (28%; 26% across the UK) and 1 in 6 are unsure (18%; 21% across the UK).
- A quarter of all construction workers in the South East (26%) and nearly three quarters of those who have had some form of supervisory or management responsibilities (73% cf. 55% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.
- SMSTS (46%) is the type of training most likely to have been received, followed by a Site Safety Supervisors Course (34%) and in-house training (30%).

Overall skill levels

- The vast majority of construction workers in the South East (98%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. Just over a third of South East construction workers (36%) hold a skill card/certificate, but have no other construction qualification. This compares with a UK average of 30%.
- Overall, while two fifths construction workers in the South East have no qualifications (42% cf. 38% in 2012 and a 2015 UK average of 37%) the majority have qualifications equivalent to Level 2 or above (56% cf. 50% in 2012 and 58% across the UK in 2015). Site managers are most likely to hold the highest level of qualifications; nearly half hold Level 4+ qualifications (44%) and a further 21% have Level 3 qualifications. Electricians and plumbers are also more likely than other occupations to hold qualifications equivalent to Level 3 or above (59% and 47%, respectively).



Geographic mobility

Work history in the region/nation

- The most likely reason why construction workers are based within the South East is because they grew up there/have always lived there (45%), with a further 5% mentioning other family reasons. Overall family reasons are mentioned to a greater degree than in 2012 (50% cf. 35%), but to a lesser degree compared to the 2015 UK average (61%). The second main reason for their location is due to their employer sending them there (in 44% of cases, cf. 41% in 2012 and 36% across the UK in 2015). Reasons differ particularly by age, with younger workers more likely to say their employer sent them, while older workers are more likely to say they have always lived there.
- In 2015, a higher proportion of construction workers in the South East compared with 2012 have worked within the region for their entire construction career (35% cf. 25% in 2012) and the majority of construction workers in the region have remained in the South East for all or most of their career (72%). This compares with a UK average of 80%.
- In more than half of cases, the last site workers were based at was also in the South East (56%).

Worker origins

- Overall more than half of all construction workers in the South East were living in the region when they started their construction career (55% cf. 52% in 2012). Workers currently based in the South East are amongst those least likely to have remained in the same region/nation in which they were based for their first construction job.
- Just over half of construction workers in the South East (55%) achieved their first qualification/training in the region. Compared with other regions/nations, they are amongst the most mobile, similar to the East of England (50%) and London (58%). The highest proportion by region/nation is 96% in Northern Ireland, followed by 95% in Scotland and 92% in the North East.

Travel to site

- More than half of construction workers in the South East have travelled at least 50 miles from their permanent/current home to work in the last 12 months (55%) and 24% have worked more than 100 miles away. In this respect, workers based in the South East are broadly similar to workers across the UK as a whole (21% have worked more than 100 miles away).
- Overall 6% of construction workers in the South East (8% in 2012) are currently staying in temporary accommodation while working at their site. This proportion is the same as the UK average (6%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 27 miles (22 miles is the UK average) which is less than in 2012 when workers travelled an average of 37 miles.



Site duration and change

- Half of the temporary workers in the South East (50%) do not know how much longer they can expect to be working for their current company/agency. This is a higher proportion than the UK average of 43%.
- 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, around 3 in 10 expect to stay on that site for a year or longer (29% cf. UK average of 26%), which is a significant increase compared with 2012 (12%), suggesting some improvement with regard to stability. However in more than a fifth of cases (22% cf. 18% in 2012) workers do not know how much longer they can expect to be on site, indicating there is still a considerable degree of uncertainty.
- Three quarters of all South East construction workers are confident that when they finish their current job their next job will allow them to travel to work from their permanent home on a daily basis (77% cf. 69% in 2012). The remaining quarter say it depends/they don't know or that they won't be able to commute. Compared with workers in other regions/nations, those in the South East are the least confident in this respect.

Sub-sector and sector mobility

Sub-sector mobility

- Compared with 2012 there has been a significant decline in the proportion of construction workers that have been working on several types of project in the South East, most notably public non-housing work (from 60% to 33%), commercial work (from 51% to 35%), private industrial work (from 43% to 30%) and infrastructure projects (from 32% to 21%). However, nearly half of all construction workers have only worked on one project type (47%), compared with 1 in 6 in 2012 (18%), which suggests a pattern of increased stability in the sector.
- The number of project types worked on varies significantly by region/nation. The South East is on par with the South West (47%) and in line with the UK average (48%) in terms of the proportion of construction workers working on one project type. Across regions/nations, the highest proportion is in Wales (63%) and the lowest is in Northern Ireland (34%).

Leaving the sector

- In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years time they will still want to be working in construction. Amongst construction workers of all ages in the South East, 43% say they definitely will be; 42% think it is very or quite likely; 5% consider it unlikely; just 2% say they definitely won't be and a further 2% hope to be retired by then, while 7% don't know.



Introduction

Aims and objectives

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

The aim of this survey was to provide a reliable evidence base of the nature of the construction workforce in the UK concerning its qualification levels and the extent of occupational and geographic mobility. The survey findings have the potential to provide a common currency for 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 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.
- Contribute to developing better methodologies for understanding and modelling the labour market impacts of workforce mobility.

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 2015 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research (2012). Overall, 4771 interviews with construction workers in manual roles across the UK were required, split between the 12 standard regions/nations. In total, 439 interviews were conducted in the South East.



Sampling

This sub-section provides an overview of the sampling methodology employed for the 2015 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 2012 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 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’.

Telephone-based site recruitment

BMG Research’s telephone 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 January-December 2014.

Figure 1: Interviews and weights by region/nation

	Interviews	Weighted profile (%)
North East	427	4.2
North West	435	10.3
Yorkshire and The Humber	369	8.2
East Midlands	410	6.6
West Midlands	352	8.0
East of England	366	10.5
London	452	12.8
South East	439	15.1
South West	494	8.7
Scotland	463	8.0
Wales	290	4.7
Northern Ireland	274	2.9
UK	4771	100

*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 2015 data are shown in brackets.

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

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



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

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

The abbreviation of SE is used to represent the South East in the tables included in this report.

Profile of construction site workers

This first section of the report provides a profile of construction site workers interviewed in the 2015 survey and where relevant makes comparisons with 2012. The section examines:-

- Personal demographics, including age and ethnicity;
- 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 (age and ethnicity) of the 2015 sample of construction workers, compared with the 2012 survey and official statistics from the Annual Population Survey.

The youngest age group (16 to 24 year olds) account for roughly 1 in 6 construction workers in the South East (16%), slightly fewer than in the previous survey in 2012 (19%). The proportion of workers aged 25 to 34 years has increased to 34% (from 30% in 2012), while the proportion of workers aged 35 to 55 years has remained stable (40% cf. 39% in 2012). There are 9% of workers aged 55 and over (compared with 11% in 2012). Workers aged 60 and over account for just 4% of construction workers.

Compared with the UK workforce overall a higher proportion of construction workers are aged under 35 years (50% in the South East; 47% across the UK cf. 37% of economically active adults across the UK).



Figure 2: Age profile of the sample compared with 2012 & the Annual Population Survey

Base: All respondents

	SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %		UK Workforce* %
16 to 19 years	3	5	5	5	16 to 19 years	4
20 to 24 years	13	14	11	13	20 to 24 years	10
25 to 34 years	34	30	30	29	25 to 34 years	23
35 to 44 years	23	23	26	22	35 to 49 years	34
45 to 54 years	17	16	19	20	50 to 64 years	26
55 to 59 years	5	11	10	6		
60+ years	4			4	65+ years	3
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4771</i>		<i>32,480,800</i>

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

In terms of ethnicity, 9 in 10 construction workers in the South East are of White origins (90%), a slight decline compared to 2012 (95%). Within this proportion 3% describe themselves as White Irish (cf. 7% in 2012) and a similar proportion as in 2012 (12%), describe themselves as 'White Other' (13%).

Workers of Black (2%) and Asian (2%) ethnic origin (BME) make up similar proportions of the sample as in 2012 (both 1%).

Figure 3: Ethnic profile of the sample compared with 2012 and UK Population

Base: All respondents

	SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %	UK Population aged 16-64* %
White	90	95	96	94	87
Black	2	1	3	2	3
Asian	2	1	1	1	5
Other/Not stated	6	3	0	3	5
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4771</i>	<i>40,626,700</i>

*Source Annual population Survey via Nomis: UK population aged 16-64 Jan-Dec14

Figure 4 summarises the proportion of construction workers of non-white (BME) origin overall and within each region/nation and compares the profile with construction workers from the 2012 survey and the population (aged 16-64) of each region/nation as a whole.

Overall 8% of construction workers in the South East sample are BME, compared with an incidence of 4% of the UK sample and 7% across the South East 16-64 aged population. This has increased since 2012 when 3% of workers in the South East sample were of BME origin.

Compared with other regions/nations, the South East has a higher proportion of construction workers that are of BME origin.



Figure 4: Proportion of construction workers of BME (Non-White) origin

Base: All respondents

	UK BME 2015 %	UK BME 2012 %	UK BME 2007 %	Region/nation's non-white (BME) population aged 16- 64* %
UK	4	4	3	10
North East	<0.5	<0.5	2	2
North West	1	2	3	8
Yorkshire and the Humber	2	1	10	9
East Midlands	2	2	<0.5	8
West Midlands	5	9	1	14
East of England	3	4	0	9
London	15	12	0	36
South East	8	3	3	7
South West	2	1	2	3
Wales	2	<0.5	1	3
Scotland	2	1	7	2
Northern Ireland	1	<0.5	4	1
<i>Unweighted bases</i>	<i>4771</i>	<i>4933</i>	<i>3877</i>	<i>32,480,800</i>

*Source Annual population Survey via Nomis: UK Population aged 16-64 by ethnicity Jan-Dec14

Overall three quarters of construction workers in the South East have lived in the UK all of their life (75%). This proportion is significantly lower than the UK average (84%). Of the remainder, 15% have lived in the UK for more than 5 years and 8% have lived in the UK for 5 years or less.

Amongst all South East construction workers 2% 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 a reduced physical capacity (50%). This is in line with the UK as a whole, where 3% of construction workers indicate they have a long term illness, health problem or disability, the most common of which is a reduced physical capacity (39%).

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 5 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from the 2012 survey.

As in the 2012 survey, labourer/general operative is the top occupation amongst construction workers in the South East (reflecting the profile across the UK), followed by bricklayers and



site managers. Within the South East, there has been a decline in the proportion that are carpenters/joiners (7% cf. 17% in 2012) but an increase in site managers (9% cf. 0% in 2012). The occupational profile in the South East is similar to that of the UK as a whole.

Figure 5: Occupational profile

Base: All respondents

	SE 2015	SE 2012	SE 2007	UK 2015
	%	%	%	%
Labourer/General operative	19	20	21	18
Bricklayer	13	11	16	15
Site manager	9	0	0	8
Carpenter/joiner	7	17	15	11
Plant/machine operative (e.g. Fork lift/JCB)	7	9	14	7
Plumber	5	6	6	5
Dryliner	5	5	With plasterer	3
Scaffolder	5	4	4	4
Electrician	4	7	3	5
Painter/decorator	3	3	2	3
Ground worker	3	0	0	4
Roofer	2	5	3	2
Steel erector/rigger	2	4	0	1
Plasterer	2	2	7	2
Technical e.g. surveyor, maintenance technician	2	2	1	2
Ceiling fixer	2	2	With plasterer	0
Banksman/banksperson	1	1	1	2
Floorer	1	1	0	1
Gardener/landscaper	1	0	0	<0.5
Fencer	1	0	0	<0.5
Project manager	1	0	0	<0.5
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4771</i>



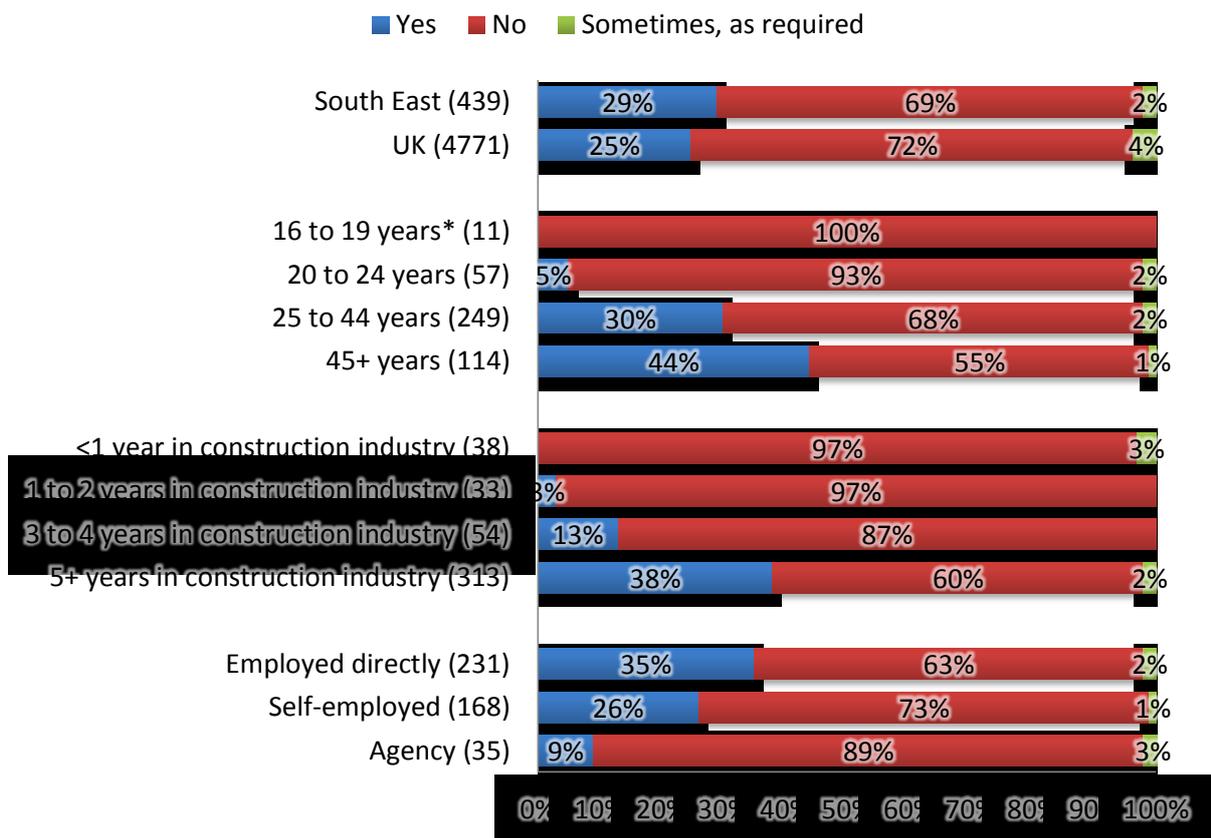
Supervisory roles

Around 3 in 10 construction workers in the South East interviewed for the 2015 survey say they perform a supervisory or management role on their site (29%). This is higher than the national proportion (25%).

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 (35%) are significantly more likely than those that are self-employed (26%) or work for an agency (9%) to perform a supervisory or management role. These differences are summarised in the following figure.

Figure 6: Whether respondents perform a supervisory or management role

Base: All respondents *caution: small sample base



Unweighted bases in parentheses

Employment status

More than half of construction workers in this year's South East sample are directly employed by a company (53%) and this has increased significantly compared with 2012 (30%), bringing it in line with the UK proportion (54%).



The next highest proportion of construction workers within the South East is self-employed (38%), which is significantly lower than in 2012 (61%), again bringing it in line with the UK proportion (39%). The proportion of workers who are self-employed is highest amongst respondents who have been working in the construction sector for 1 to 2 years (52%).

Just 8% of the sample is accounted for by construction workers who are working for an employment agency, although the proportion is higher amongst those who have been working in the construction industry for less than a year (16%). This is summarised in the following table.

Figure 7: Employment status

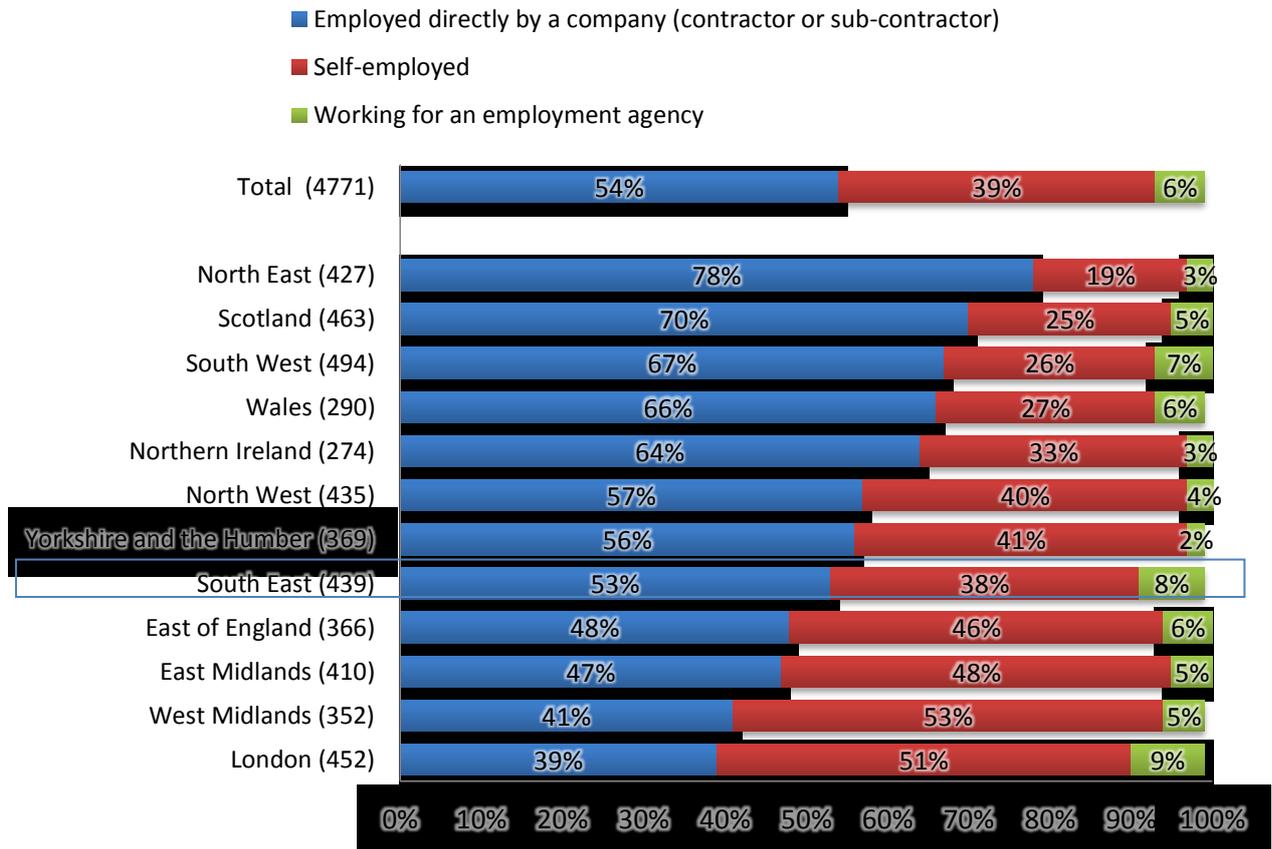
Base: All respondents

	SE 2015 %	SE 2012 %	UK 2015 %	Years working in construction			
				<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	53	30	54	45	39	59	54
Self-employed	38	61	39	39	52	31	38
Working for an employment agency	8	8	6	16	9	9	7
Working on some other basis	1	0	<0.5	0	0	0	2
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>4771</i>	<i>38</i>	<i>33</i>	<i>54</i>	<i>313</i>

The proportion employed directly in the South East is in line with the UK average (53%, compared with 54%), while the proportion that are self-employed is also similar (38%, compared with 39%). The South East, alongside the North West and Yorkshire and the Humber, has an employment status profile closest to the UK average.



Figure 8: Employment status by region/nation
 Base: All respondents



Unweighted bases in parentheses

Employment contract basis

Overall, 18% of construction workers in the South East are employed on a temporary, rather than permanent basis (79%). The remainder believed they had another type of contract arrangement (1%) or refused to answer (2%).

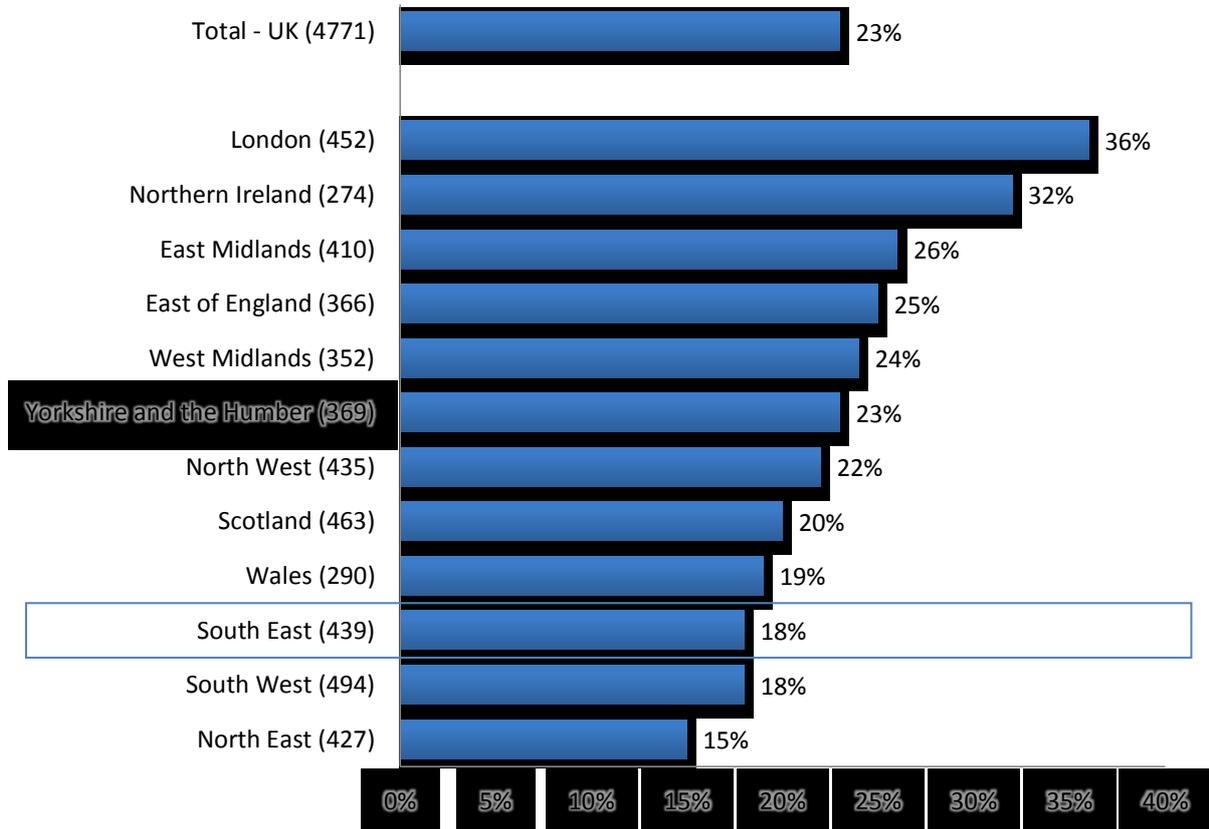
Amongst workers who are employed by an agency the proportion on temporary contracts is significantly higher, as one would expect (80%), as it is amongst those who are self-employed (24%) or employed directly (4%).

The South East has fewer workers employed on a temporary basis compared to the UK average (23%), as the following figure illustrates.



Figure 9: Proportion of workers employed on a temporary basis (including fixed-term contracts)

Base: All respondents



Unweighted bases in parentheses

By current trade/role, the proportion working on a temporary basis is highest amongst labourers/general operatives (28%) and plant/machine operatives (27%) and lowest amongst roofers* (0%), plasterers* (0%), site managers (5%), plumbers* (5%) and scaffolders (5%). (*Caution: Small sample base.)

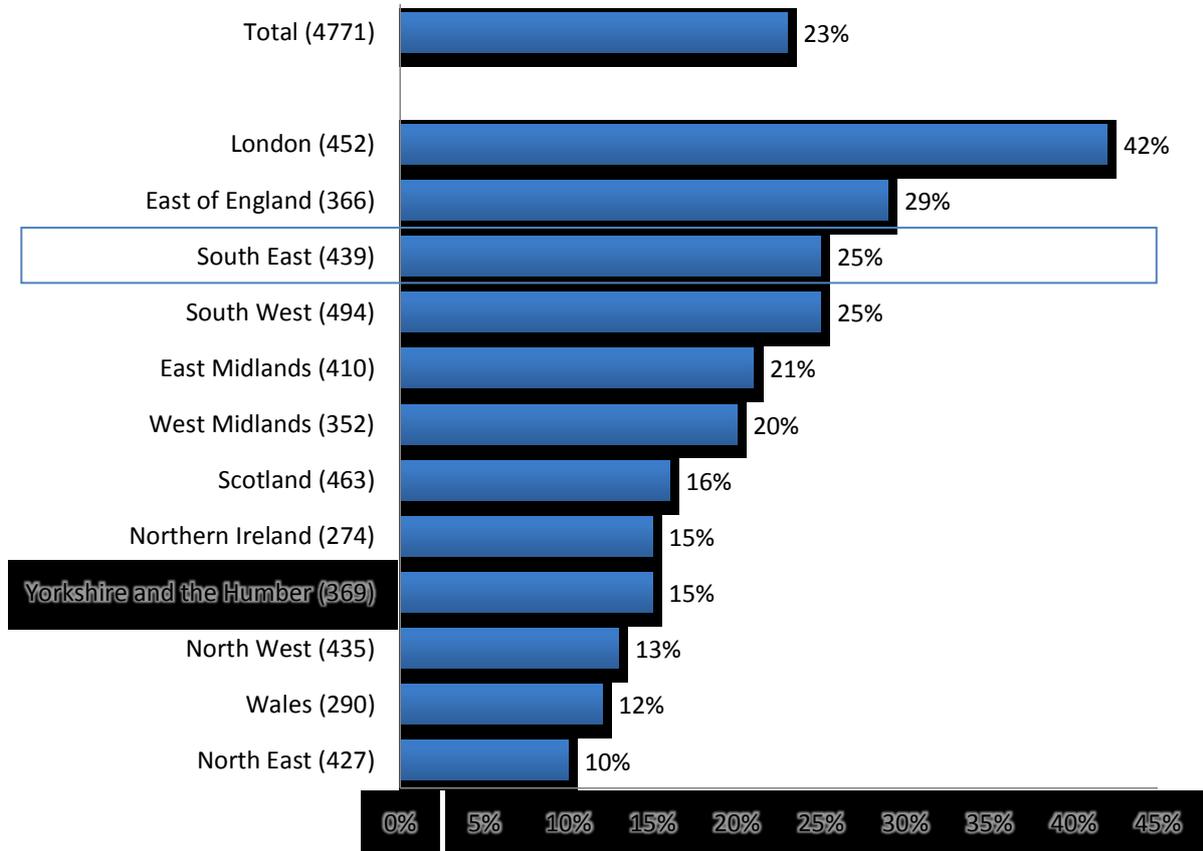
Hours worked

On average construction workers in the South East report that they typically work 45 hours per week, with two thirds that tend to work between 40 and 49 hours per week (67%) and a quarter that work more than 50 hours (25%).

The proportion that works more than 50 hours per week is broadly in line with the UK average (23%) amongst South East construction workers.



Figure 10: Proportion of workers that typically work 50 or more hours per week
Base: All respondents



Unweighted bases in parentheses

Work histories

Time in the sector

More than a quarter of South East construction workers have worked in the construction industry for over 20 years (28%) and half have worked in the industry for at least 10 years (50%).

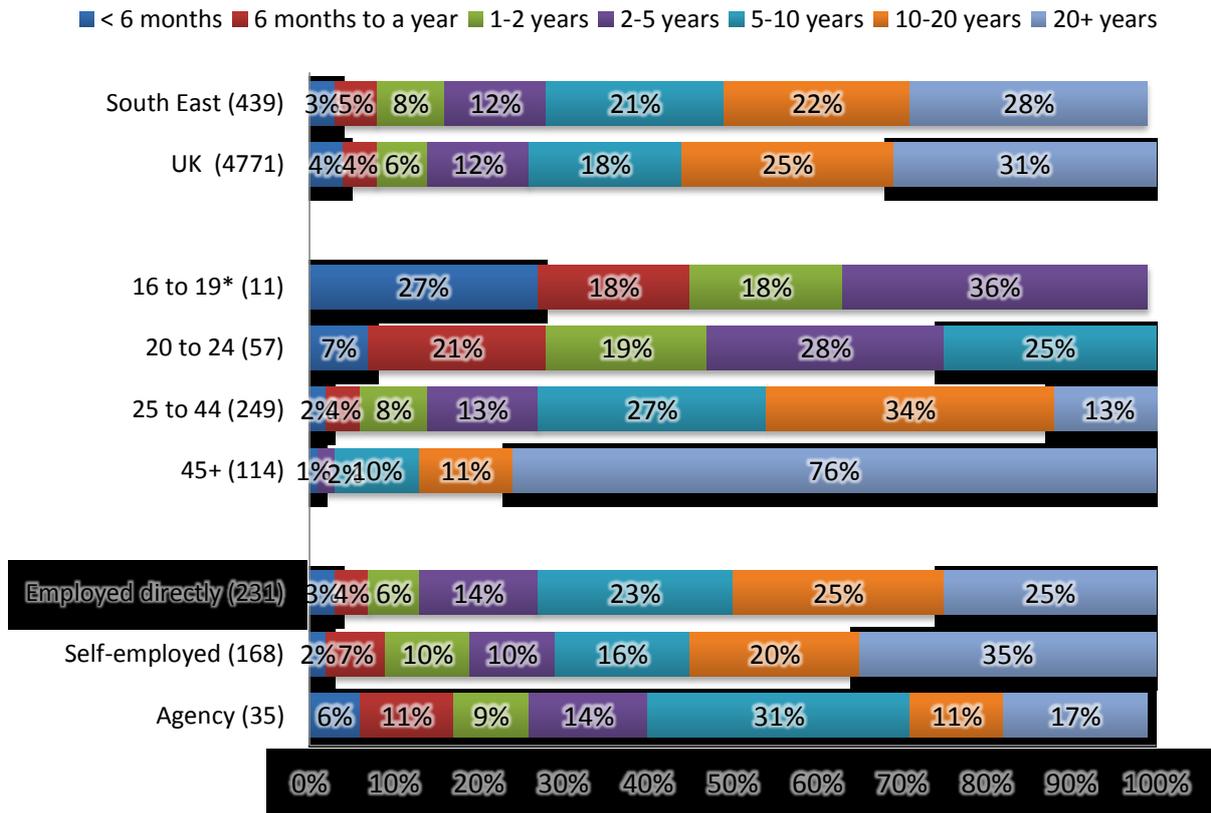
Construction workers in the South East are less likely than the UK average to have worked in industry for over 10 years (50% compared to 56% across the UK).

As one would expect the length of experience in the industry increases with age to three quarters of workers aged 45 and over in the South East that have more than 20 years experience of working in the construction sector (76%).



Figure 11: Years spent working in the construction sector

Base: All respondents *caution: small sample base



Unweighted bases in parentheses

Compared with 2012 Figure 12 shows that in 2015 workers are more likely to have worked in the construction sector for up to 2 years (16% cf. 11% in 2012), whilst 22% have between 10 and 20 years experience, compared with 26% in 2012.

Figure 12: Years spent working in the construction sector (cumulative)

Base: All respondents

	SE 2015	SE 2012	SE 2007	UK 2015
	%	%	%	%
Less than 6 months	3	2	3	4
Up to a year	8	5	7	8
Up to 2 years	16	11	12	14
Up to 5 years	28	23	27	26
Up to 10 years	49	45	44	44
Up to 20 years	71	71	67	69
More than 20 years	28	28	33	31
Unweighted bases	439	420	331	4771



Pre-construction employment histories

Three fifths of workers in the South East have only ever worked in the construction industry (65% cf. 70% across the UK and 66% within the South East in 2012). This includes over half who have worked in construction pretty much continuously (52%); 8% for whom this is their first job; and a further 5% that have only ever worked in the construction sector, but have had spells out of work.

The likelihood that workers have worked continuously in construction increases with age; up to 62% of workers aged 45 and over. Whilst, as one would expect, younger workers are more likely to say that this is their first job and that they have not worked in any other industry (45% of 16 to 19 year olds).

Figure 13: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.

*All respondents *caution: small sample base*

	SE 2015 %	UK 2015 %	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)	52	55	27	32	52	62
I have only worked in construction jobs but have had spells of being out of work	5	6	0	9	5	5
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	8	8	9	4	10	9
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	23	19	18	37	22	21
This is my first job. I haven't worked in any other industry.	8	9	45	16	8	1
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	2	3	0	2	2	2
Prefer not to say	1	2	0	2	1	0
<i>Unweighted bases</i>	<i>439</i>	<i>4771</i>	<i>11*</i>	<i>57</i>	<i>249</i>	<i>114</i>

Overall nearly a quarter of construction workers in the South East say that their first job after full time education was NOT in construction and that they moved into the industry after working in other sorts of jobs/sectors (23% cf. 25% in 2012).

Those who had worked in other sectors before starting their construction careers (25% of all respondents) were asked to give details of what they were doing immediately before they started working in construction. In a quarter of cases respondents had previously worked in the wholesale/retail sector (25%) while 16% had worked in accommodation and food service activities beforehand, 13% in manufacturing and 12% in transportation and storage.



Figure 14: Industry worked in before starting work in the construction sector

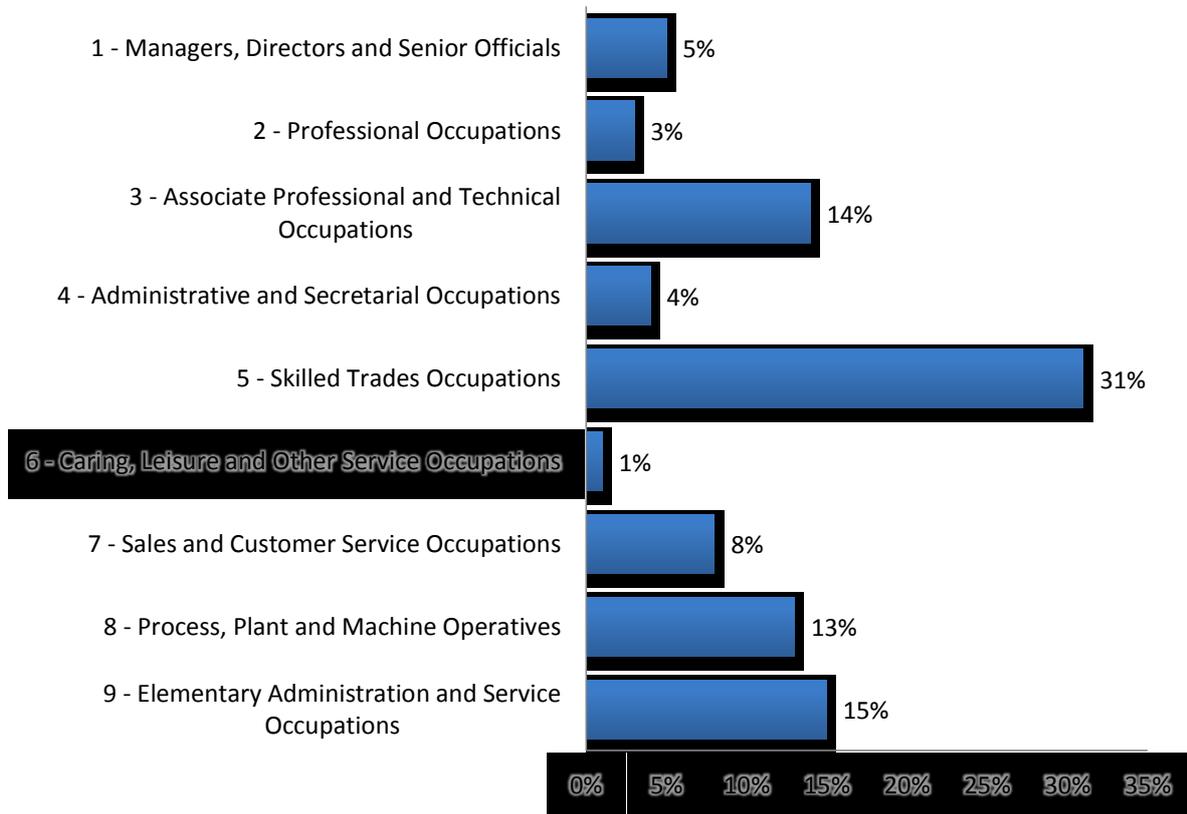
Base: Where first job was not in construction

	SE 2015 %	UK 2015 %
G – Wholesale and retail trade; repair of motor vehicles and motorcycles	25	22
I – Accommodation and food service activities	16	10
C – Manufacturing	13	20
H – Transportation and storage	12	10
O – Public administration and defence; compulsory social security	9	6
A – Agriculture, Forestry and Fishing	5	6
M – Professional, scientific and technical activities	4	0
R – Arts, entertainment and recreation	3	4
P – Education	3	0
N – Administrative and support service activities	2	6
J – Information and communication	2	2
<i>Unweighted bases</i>	<i>110</i>	<i>983</i>

In terms of the job roles that South East respondents have undertaken in other sectors, the highest proportion has worked in skilled trades occupations (31% cf. 29% in 2012 and across the UK), followed by elementary administration and service occupations (15% cf. 37% in 2012 and 21% across the UK in 2015), associate professional and technical occupations (14%; 10% in 2012, 12% across the UK in 2015) and process, plant and machine operatives (13%; the same as the UK average).



Figure 15: Job roles undertaken in other sectors
 Base: Where first job was not in construction



Unweighted base = 110

Occupational switching and progression within construction

As in the 2012 survey, as well as asking workers about their current role, all workers were also asked whether they have worked in other roles/occupations whilst working in the construction industry.

Overall more than a third of all construction workers in the South East have worked in more than one construction trade or occupation whilst working in the construction industry (37%). This represents a significant increase compared with 2012 when just over a quarter had worked in more than one role (27%). The proportion in the South East is slightly higher than the UK average (34%).

As one would expect the proportion of workers that have had more than one role is highest among those aged 45+ (51%).

Workers with the highest level of qualifications (Level 4 and above) are also more likely to have had more than one role or occupation within the construction sector (59%), as are those in a supervisory or management role on site (47%).



As in 2012, there are also variations by current job role, with site managers (73%), followed by plant/machine operatives (65%) most likely to have had more than one role/occupation within construction. Electricians are least likely to have had any other trade within the construction sector (6%). 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 16: Other construction roles under taken, by current occupation

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

MORE likely to have had more than one role			LESS likely to have had more than one role		
	SE 2015 %	UK 2015 %		SE 2015 %	UK 2015 %
Site manager (37)	73	69	Dryliner (21)	33	38
Plant / Mach. Op. (26)	65	55	Scaffolder (22)	32	31
Banksman /banksperson* (5)	60	46	Labourer / Gen. Op. (81)	28	33
Roofer* (8)	50	29	Bricklayer (59)	20	19
Plasterer* (7)	43	34	Carpenter / Joiner (27)	19	18
Painter / decorator* (13)	38	27	Plumber (22)	14	13
			Electrician* (17)	6	13

Unweighted bases for 2015 South East in parentheses

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

Workers are most likely to have previously worked as a labourer/general operative (35%) while 1 in 8 workers has previously worked as a carpenter/joiner (12%) or a bricklayer (12%).



Figure 17: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	SE 2015	UK 2015
	%	%
Labourer/General operative	35	30
Carpenter/joiner	12	18
Bricklayer	12	13
Dryliner	10	7
Plant/machine operative (e.g. Fork lift/JCB)	9	10
Roofer	9	9
Painter/decorator	9	8
Plasterer	6	7
Site manager	5	5
Plumber	5	5
Banksman/banksperson	4	7
Ground worker	4	5
Pipe fitter	4	5
Floorer	4	3
Technical e.g. surveyor, maintenance technician	3	4
Ceiling fixer	3	4
Scaffolder	2	4
Electrician	2	3
Welder	2	2
Steel erector/rigger	1	3
Gardener/landscaper	1	1
Mechanical fitter	1	1
Tiler	1	1
Glazer/window fitter	1	1
Drilling worker	1	<0.5
Fencer	1	<0.5
Other	10	6
<i>Unweighted bases</i>	<i>162</i>	<i>1576</i>

Future career plans

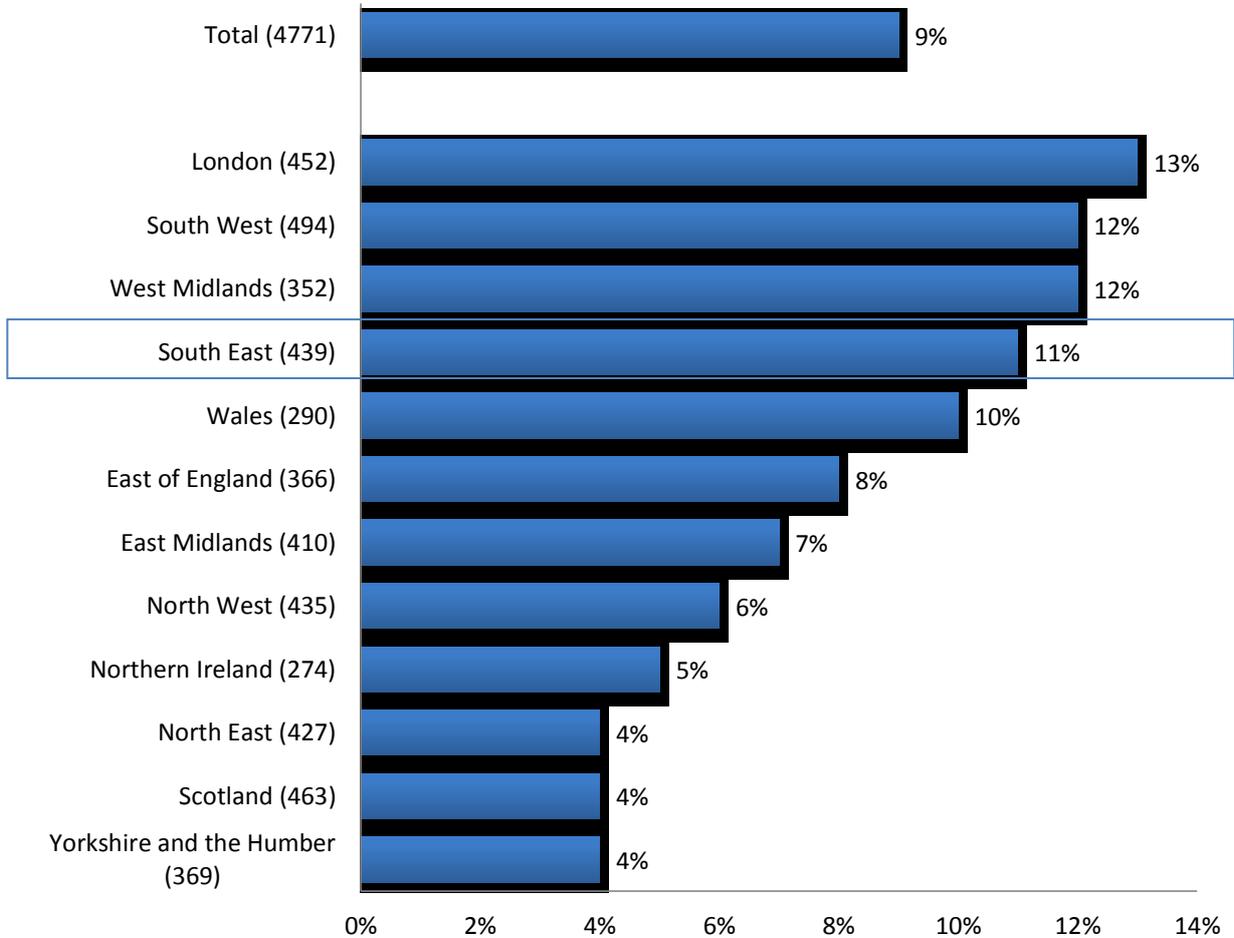
Thinking about their future plans in construction, around four fifths of construction workers in the South East would like to carry on in the same trade or occupation (79%); 1 in 9 would like to change their trade/occupation (11%); and a further 4% would like to leave construction; the remainder are not sure.

The proportion of construction workers in the South East that want to carry on as they are is in line with the UK average (79%), however slightly more workers would like to change their trade/occupation (9% across the UK).



Figure 18: Proportion of construction workers that would like to change their trade or occupation, by region/nation

Base: All respondents



Unweighted bases in parentheses

Construction workers currently working for an agency (46%) are more likely than those employed directly (7%) or self-employed (10%) to want to change their trade or occupation; whilst by current trade/occupation those working as a labourer/general operative (26%) or a dryliner (24%) are most likely to.



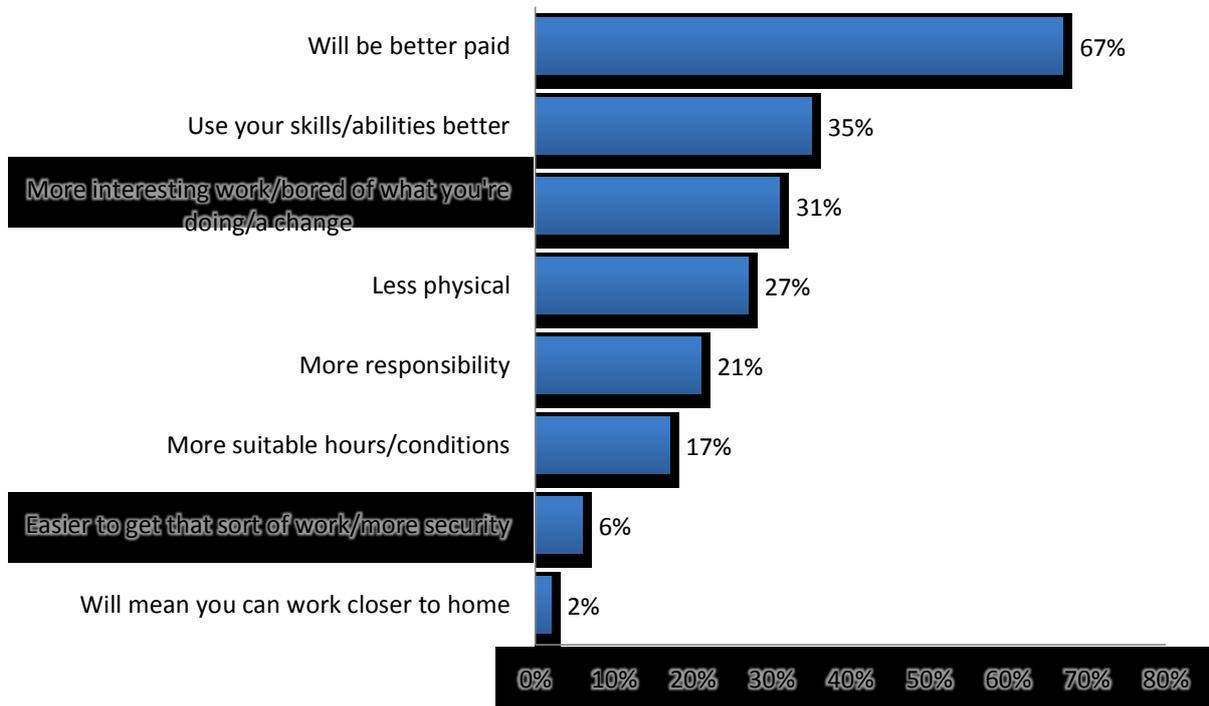
Amongst those who would like to change trade or occupation a wide range of alternative trades/occupations are mentioned, however the highest proportion overall would like to be a site manager (19%), followed by an electrician (13%).

In nearly three quarters of all cases where construction workers in the South East would like to change trade or occupation they believe they will require further training or qualifications in order to do this other kind of work (73%). This compares to a higher proportion across the UK (77%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (67%), while around a third would like to make better use of their skills or abilities (35%) or to have more interesting work or a change (31%). A quarter would like an occupation that is less physical (27%).

Figure 19: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 48

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 1% of all construction workers in the South East (2% nationally) say they do not hold any card and 1% are unsure. In total therefore 98% of all workers are certain that they hold at least one type of skill card or certificate that provides evidence to construction sites that they have received a certain level of health and safety awareness training.

Figure 20 summarises the proportion of workers by region/nation that hold any card and compares these proportions with the 2012 survey. Workers in the South East are amongst those in London and the West Midlands that are most likely to hold skill certificates or cards (98% in each case). There has been a slight increase in this respect in the South East since 2012; and the increase in the proportion of workers in the South East, as across all regions/nations, that have a skill card/certificate since 2007 is significant.

Figure 20: Proportion of workers that have a skill card/certificate, by region/nation

Base: All respondents

	UK 2015 %	UK 2012 %	UK 2007 %
Total (4771)	96	97	68
London (452)	98	96	72
South East (439)	98	96	71
West Midlands (352)	98	100	79
North West (435)	97	98	75
Yorkshire and the Humber (369)	97	97	66
East of England (366)	96	98	81
North East (427)	96	99	68
South West (494)	96	97	70
East Midlands (410)	93	99	60
Wales (290)	92	92	82
Northern Ireland (274)	90	100	84
Scotland (463)	88	98	59
<i>Unweighted bases for 2015 in parentheses</i>			

As in 2012, the incidence of workers holding skill cards or certificates remains lower amongst younger workers (89% amongst 16 to 19 year olds) and those who have worked within construction for a shorter period of time (92% 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.

However, more positively, as Figure 21 summarises, in terms of those with less experience of the industry, in 2015, a higher proportion of those aged 16 to 19 and those with less than 1 year of experience hold a skill card or certificate than in 2012.



Figure 21: Proportion of workers that have a skill card/certificate, by other variables

Base: All respondents *caution: small sample base

		SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %
Total (439)		98	96	71	96
Age	16 to 19 years* (11)	89	68	25	85
	20 to 24 years (57)	96	95	58	95
	25 to 44 years (249)	99	99	74	97
	45+ years (114)	97	95	82	95
Length of time in construction	<1 year in construction (38)	92	84	37	88
	1 to 2 years (33)	97	85	61	96
	3 to 4 years (54)	98	97	48	96
	5+ years (313)	98	97	77	96
Contract-type	Employed directly (231)	98	88	77	95
	Self- employed (168)	98	99	67	97
	Agency (35)	97	100	60	95
<i>Unweighted bases for 2015 South East in parentheses</i>					

In terms of the type of skill card or certificate held by construction workers in the South East the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (91%), as it was in 2012 (91%). Overall 13% hold the CPCS (Construction Plant Competence Scheme) card/certificate and this proportion increases to 23% amongst workers aged 45+.

Figure 22: Type of skill card/certificate held

Base: All respondents

	SE 2015 %	SE 2012 %	UK 2015 %
CSCS (Construction Skills Certification Scheme) (GB)	91	91	86
CSR (Construction Skills Register) (NI)	<0.5		3
CISRS (Construction Industry Scaffolders Record Scheme)	5	3	4
CPCS (Construction Plant Competence Scheme)	13	9	13
Other	3	4	4
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>4771</i>

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

- Plant/machine operatives (73%) are most likely to hold CPCS (Construction Plant Competence Scheme);
- More than three quarters of scaffolders (77%) hold CISRS (Construction Industry Scaffolders Record Scheme);
- At least 95% of labourers/general operatives, carpenters/joiners, bricklayers, banksman/banksperson*, roofers*, plasterers* and site managers hold CSCS (Construction Skills Certification Scheme (GB)) (*Caution: Small sample base.);



- Almost a fifth of electricians hold other types of skill cards/certificates (18%).

Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 23 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Overall, within the South East, 9% of CSCS card holders have red cards; two fifths of CSCS card holders have green cards (41%); and almost a quarter of CSCS card holders (23%) and one of the two CSR card holders in the South East have blue cards. Approximately 1 in 6 (16%) of CSCS card holders and the other of the two CSR card holders have gold cards.

Figure 23: Colour of CSCS/CSR cards held

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

	CSCS %		CSR* %
Red - Trainee	7	Red - Apprenticeship/Trainee	0
Red - Experienced worker card	2	Red - Trained Plant Operator	0
Green - construction site operative card for general site workers	41	Green - Construction Operative (for general site workers)	0
Blue - skilled	23	Blue - Operative/ Craft	50
		Blue - Plant Operator	0
		Blue - Basic Scaffolder	0
Gold - craft/supervisor card	16	Gold - Craft/Supervisor Card	50
		Gold - Advanced Scaffolder	0
Platinum - manager card	1	Platinum - Manager Card	0
Black - contracts manager card	5	Black - Senior Managers Card	0
Other	2	Other Professional cards, visitor cards, temporary cards	0
Unsure	3	Unsure	0
<i>Unweighted bases</i>	<i>398</i>		<i>2</i>

As expected, younger workers are more likely to hold Red Trainee cards (40% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue or Gold cards (28% and 26% of 45+ year olds). Workers currently employed by an agency are more likely to hold Green cards (76%), compared with those employed directly (36%) or self-employed (42%).

Card colours also vary significantly according to current occupation/trade, as Figure 24 summarises. Labourers/general operatives are most likely to hold Green cards (74%); and plumbers (45%) and site managers (31%) are most likely to hold Gold cards.



Figure 24: Colour of CSCS card held, by current occupation

Base: Where currently hold a CSCS card

*caution: small sample base

	Unweighted bases	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold %	Platinum %	Black %
Labourer / Gen. Op.	78	3	5	74	13	1	0	0
Plant / Mach. Op.*	17	0	0	41	41	12	0	0
Carpenter / Joiner	27	7	4	33	30	22	0	0
Bricklayer	56	7	0	30	36	21	2	0
Dryliner*	19	5	0	42	53	0	0	0
Banksman / Banksperson*	5	0	0	60	20	0	0	0
Electrician*	14	43	7	21	0	29	0	0
Roofer*	8	0	13	38	25	13	0	0
Painter / decorator*	12	0	8	50	25	0	0	0
Plasterer*	7	0	0	71	14	0	0	0
Plumber	20	5	0	20	25	45	0	0
Scaffolder*	13	23	0	38	31	0	0	0
Site manager	36	11	0	6	3	31	6	42

Construction qualifications held

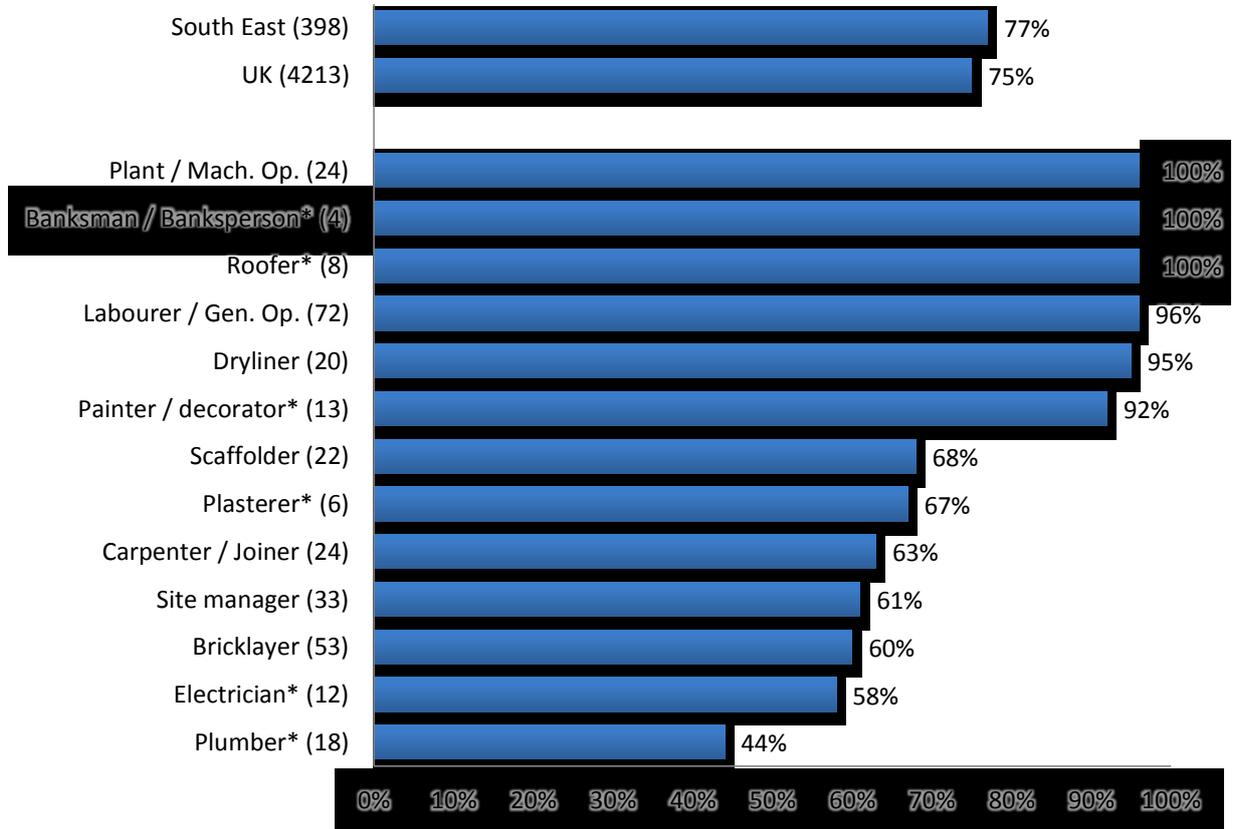
All workers were asked about the construction-specific qualifications they held after leaving full time education and started their first proper job in construction.

Overall more than three quarters of construction workers in the South East say they had no formal qualifications related to construction when they first started working in the construction industry (77%). By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst plant/machine operatives, roofers*, and banksmen* (all 100%) labourers/general operatives (96%) and dryliners (95%), whilst plumbers (44%) are least likely to have started with no formal qualifications. (*Caution: Small sample base.)



Figure 25: 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 who provided a valid response *caution: small sample base



Unweighted bases in parentheses

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

Overall, more than half of South East construction workers reported holding some sort of construction related qualification at the time of interview (58%), compared with a similar proportion in 2012 (62%) and the UK average (63% in 2015).

As Figure 26 summarises the proportion of workers that hold any qualifications is lower than average amongst those aged 16 to 19 (30%), those who have worked in construction for less than a year (22%) and workers employed by an agency (29%).



Figure 26: Proportion of workers that hold any construction-specific qualification

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

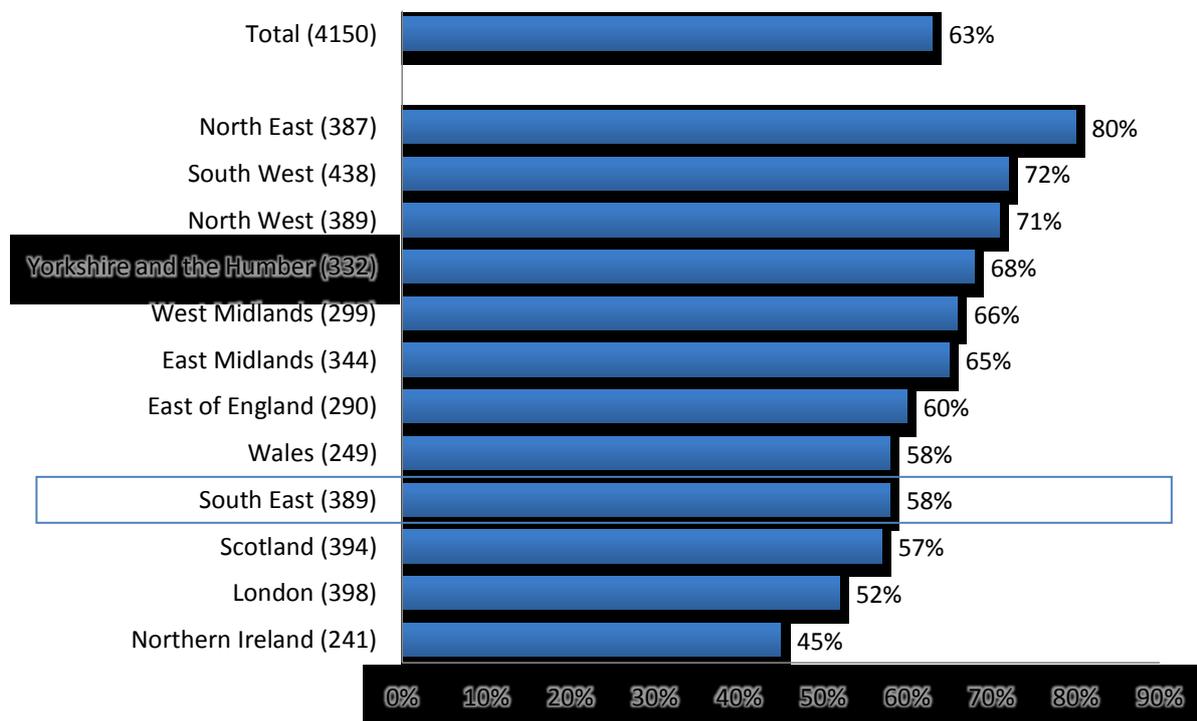
		SE 2015	SE 2012	SE 2007	UK 2015
		%	%	%	%
South East (389)		58	62	52	63
Age	16 to 19 years* (10)	30	42	25	62
	20 to 24 years (54)	52	62	36	62
	25 to 44 years (222)	61	63	60	65
	45+ years (95)	61	64	48	61
Length of time in construction	<1 year (37)	22	9	0	35
	1 to 2 years (28)	43	33	19	50
	3 to 4 years (51)	59	63	31	54
	5+ years (272)	64	68	61	68
Current contract type	Employed directly (203)	66	69	51	65
	Self-employed (150)	55	62	62	61
	Agency (31)	29	40	15	46

Unweighted bases for 2015 South East in parentheses

Similar to Wales and Scotland, the propensity of the construction workforce in the South East to hold any construction-specific qualifications is slightly lower than the UK average (see Figure 27).

Figure 27: Proportion of workers that hold any construction-specific qualification, by region/nation

Base: All respondents who provided a valid response



Unweighted bases in parentheses



The likelihood that workers hold any qualifications also varies significantly by current job role, as was the case in 2012. Scaffolders (86%), plumbers* (84%), site managers (79%) and electricians* (76%) are most likely to hold qualifications. Trades less likely to hold formal qualifications include those working as painter/decorators* (25%), roofers* (25%) and labourers/general operatives (26%). (*Caution: Small sample base.)

Type of construction qualifications held

Based on the qualifications that workers had when they first started working in the construction industry and any they have gained since Figure 28 summarises the types of qualifications that workers hold and compares the figures to the 2012 survey (amongst those who have any qualifications).

As in 2012 the qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (67%), which is a similar proportion to that reported in 2012 in the South East (68%) and the UK 2015 average (66%). In the South East, 1 in 6 construction workers with qualifications hold City & Guilds qualifications (17%), the same proportion as in 2012 and slightly lower than the UK 2015 average (20%). A quarter of construction workers in the South East with qualifications now hold an apprenticeship (25%), which is a significant increase compared with 2012 when just 1% did, and is also significantly greater than the UK average (13%).

Figure 28: Main type of qualification held

Base: Workers with qualifications who provided a valid response

	SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %
NVQ/SVQ	67	68	56	66
City & Guilds	17	17	34	20
Apprenticeship	25	1	1	13
HNC/HND/BTEC Higher	3	1	2	4
Degree	6	0	0	4
Other	8	3	0	11
<i>Unweighted bases</i>	<i>196</i>	<i>173</i>	<i>161</i>	<i>2455</i>

Additional formal training

Self-assessment of basic skills needs

Given the need for construction workers to read instructions and record information it is important to ensure that the workforce has the skills required to perform these tasks. As in 2012, the survey therefore asked all workers whether or not they perceive the need for training in any basic skills to help with their work.

Overall 1 in 7 construction workers in the South East believe they would benefit from some form of training in basic skills (14%), compared with 1 in 5 in 2012 (20%). In terms of the type



of training required, 8% believe they would benefit from training in speaking English, 6% from training in reading and writing, and 3% from training in maths, as Figure 29 summarises.

Figure 29: Self-assessed need for training in basic skills

Base: All respondents

	SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %
ANY	14	20	10	14
Speaking English	8	8	5	7
Reading	6	9	5	6
Writing	6	8	5	6
Maths	3	9	4	6
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4771</i>

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

- Workers aged 20-24 (21% cf. 10% aged 45+);
- Those who have worked in the industry for a year (34%) or 1 to 2 years (24%);
- Dryliners (38%) and labourers/general operatives (27%).

The proportion that identified a need for more training in basic skills in the South East is the same as the UK average.

Current study for additional construction qualifications

Overall 10% of all construction workers in the South East are currently working towards any formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 9% in 2012 and a UK average in 2015 of 12%).

As in 2012 the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (55% of 16 to 19 year olds) and amongst those who have worked within the construction industry for less than a year (24%). Workers employed directly (14%) are also more likely than those who are self employed (7%) or working through an agency (6%) to be currently working towards a qualification.

Of those who have no qualifications currently 1 in 10 are working towards one (10%).

Figure 30 summarises these findings.



Figure 30: Proportion working towards additional construction qualifications

Base: All respondents *caution: small sample base

		SE 2015	SE 2012	SE 2007	UK 2015
		%	%	%	%
Total (439)		10	9	11	12
Age	16 to 19 years* (11)	55	37	25	57
	20 to 24 years (57)	21	12	21	23
	25 to 44 years (249)	8	13	9	10
	45+ years (114)	7			4
Length of time in construction	<1 year in construction (38)	24	16	13	31
	1 to 2 years (33)	12	33	22	28
	3 to 4 years (54)	20	10	17	23
	5+ years (313)	7	6	10	7
Contract type	Employed directly (231)	14	N/A	N/A	16
	Self-employed (168)	7	N/A	N/A	8
	Agency (35)	6	N/A	N/A	10
Highest qualification level	None (163)	10	N/A	N/A	11
	Level 1* (10)	30	N/A	N/A	32
	Level 2 (131)	11	N/A	N/A	15
	Level 3 (53)	11	N/A	N/A	8
	Level 4+ (32)	13	N/A	N/A	15

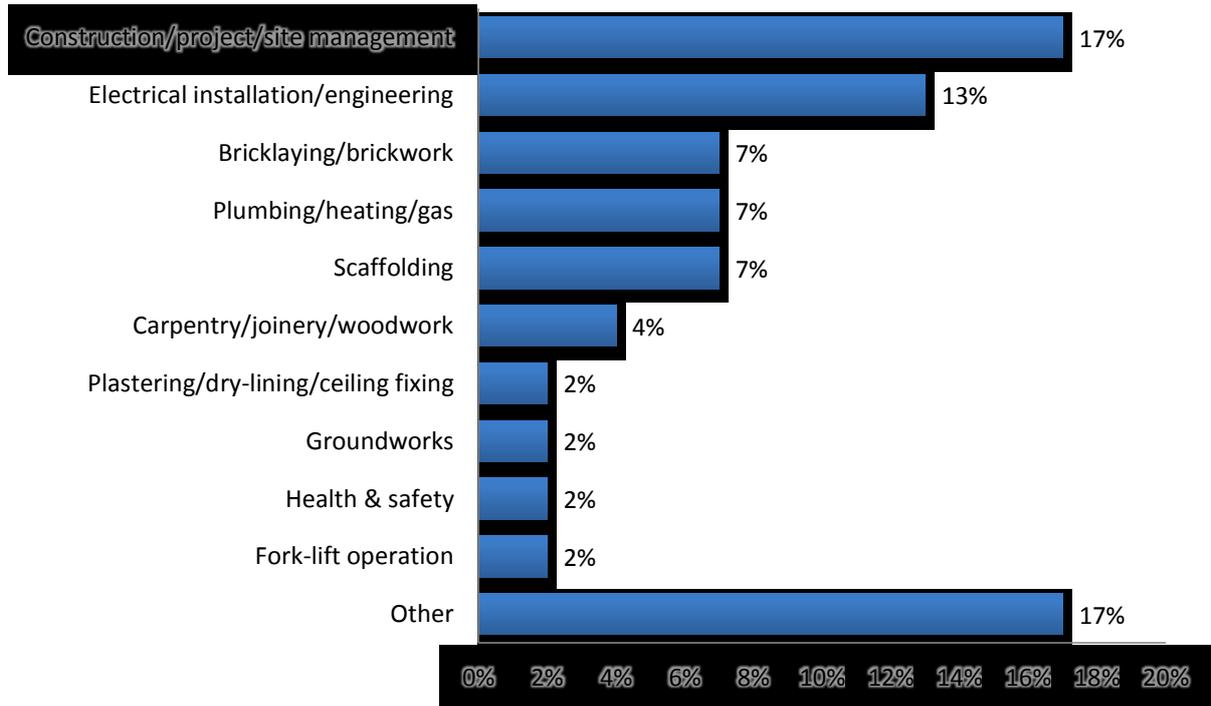
Unweighted bases for 2015 South East in parentheses

Of those who are currently studying for a qualification the most popular type of qualification is an NVQ/SVQ (41%). In terms of the subject of the qualifications being worked towards construction/project/site management (17%), followed by electrical installation/engineering (13%) are most popular, as Figure 31 illustrates.



Figure 31: Subject of qualification being worked towards

Base: Where working towards a qualification who provided a valid response



Unweighted base = 46

With regard to the level of qualification being worked towards (see Figure 32), qualifications equivalent to Level 2 (34%) and Level 3 (26%) are most popular, including amongst those with no qualifications currently (50% and 21% working towards each level).

Figure 32: Level of qualification being worked towards

Base: Where working towards a qualification who provided a valid response

	SE 2015 %	UK 2015 %
Level 1	5	6
Level 2	34	31
Level 3	26	35
Level 4+	18	11
Other	8	9
None	8	7
Unweighted bases	38	469



Supervisory and managerial qualifications and training

As reported earlier, 29% of all construction workers in the South East perform a supervisory or management role at their site. Amongst those who do not currently perform supervisory/management roles 1 in 5 want to become a supervisor or manager in the future, but have not done it before (20%) and a further 8% want to be a supervisor/manager and have done it before. One in six workers that are not currently managers/supervisors are unsure as to whether they'd like to be one in the future (18%), while more than half are certain that they do not want to be (54%).

Amongst workers aged 16 to 19, the proportion that would like to be supervisors/managers is highest, at 36%, while amongst those aged 45 and over a significantly higher proportion of workers definitely do not want to be supervisors/managers (76%). 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 58% of those having worked in construction for 5+ years not wishing to be supervisors/managers. Analysis by contract type reveals that those who currently work for an agency (32%) are more likely than those employed directly (21%) or self-employed (16%) to want to be a supervisor/manager, but have not done it before.



Figure 33: Whether those who are not currently supervisors want to be one in the future

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

*caution: small sample base

		Unweighted bases	Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
South East		304	20	8	54	18
UK		3457	20	6	53	21
Age	16 to 19 years*	11	27	9	27	36
	20 to 24 years	53	25	0	47	28
	25 to 44 years	170	22	9	50	19
	45+ years	63	10	10	76	5
Length of time in construction	<1 year	37	24	3	49	24
	1 to 2 years	32	19	13	50	19
	3 to 4 years	47	26	2	45	28
	5+ years	187	18	9	58	15
Contract type	Employed directly	146	21	9	55	16
	Self-employed	122	16	7	58	18
	Agency	31	32	3	39	26
Highest qualification level	No Qualifications	137	20	4	58	18
	Level 1*	9	33	33	22	11
	Level 2	94	17	6	55	21
	Level 3	28	14	14	54	18
	Level 4+*	6	33	33	33	0

A quarter of all construction workers in the South East (26%; 25% across the UK) and nearly three quarters of those who have had some form of supervisory or management responsibilities (73% cf. 55% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.

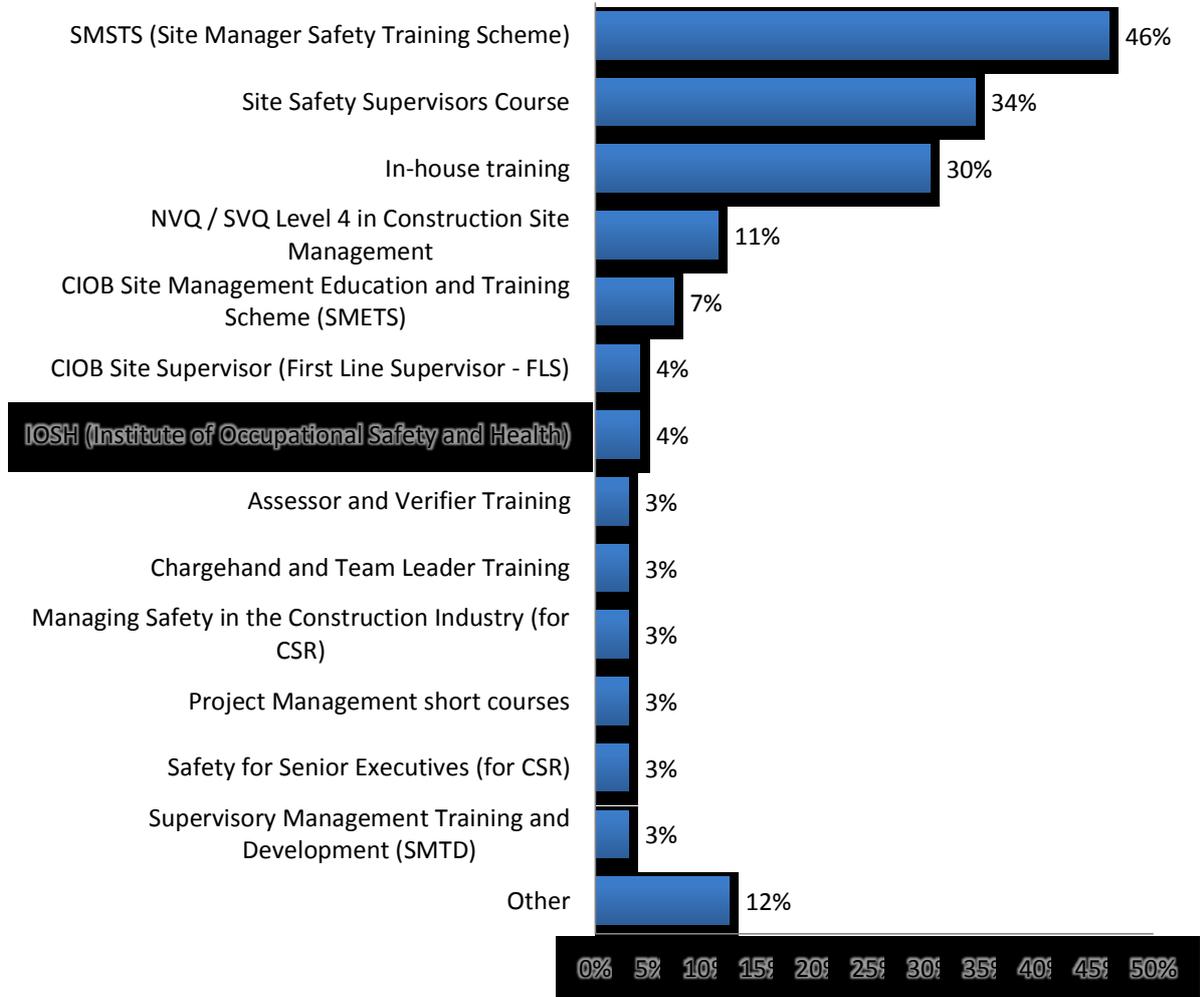
The proportion that has undertaken any managerial or supervisory training increases to 38% amongst workers aged 45 and over and to 33% amongst those that have worked in construction for 5+ years. Virtually all site managers have received formal training designed to improve managerial or supervisory knowledge or skills (97%).

In terms of the types of supervisory/managerial training undertaken the proportions mentioning each type are summarised in Figure 34. SMSTS is most frequently mentioned by those who have undertaken any training (46%), followed by Site Safety Supervisors Courses (34%) and in-house training (30%). These were also the top three most mentioned types of supervisory training in 2012.



Figure 34: Types of managerial/supervisory training undertaken

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



Unweighted base = 115

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 35 below.

As in 2012 the vast majority of construction workers in the South East (98%) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

Just over a third of the workforce (36%) holds a skill card/certificate, but have no other construction qualification, this is significantly lower than in 2012 (55%), however is more consistent with findings from 2007 (31%).



Figure 35: Qualification status summary

Base: All respondents

	SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	98	96	83	98
Holds a formal construction qualification or a skills card/certificate	98	96	80	97
Holds a skills card/certificate	98	96	80	96
Holds a skills card/certification but no other qualification	36	55	31	30
Working towards a qualification	10	9	11	12
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4771</i>

Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. Figure 36 summarises all construction workers' highest level of qualification, overall and by occupation.

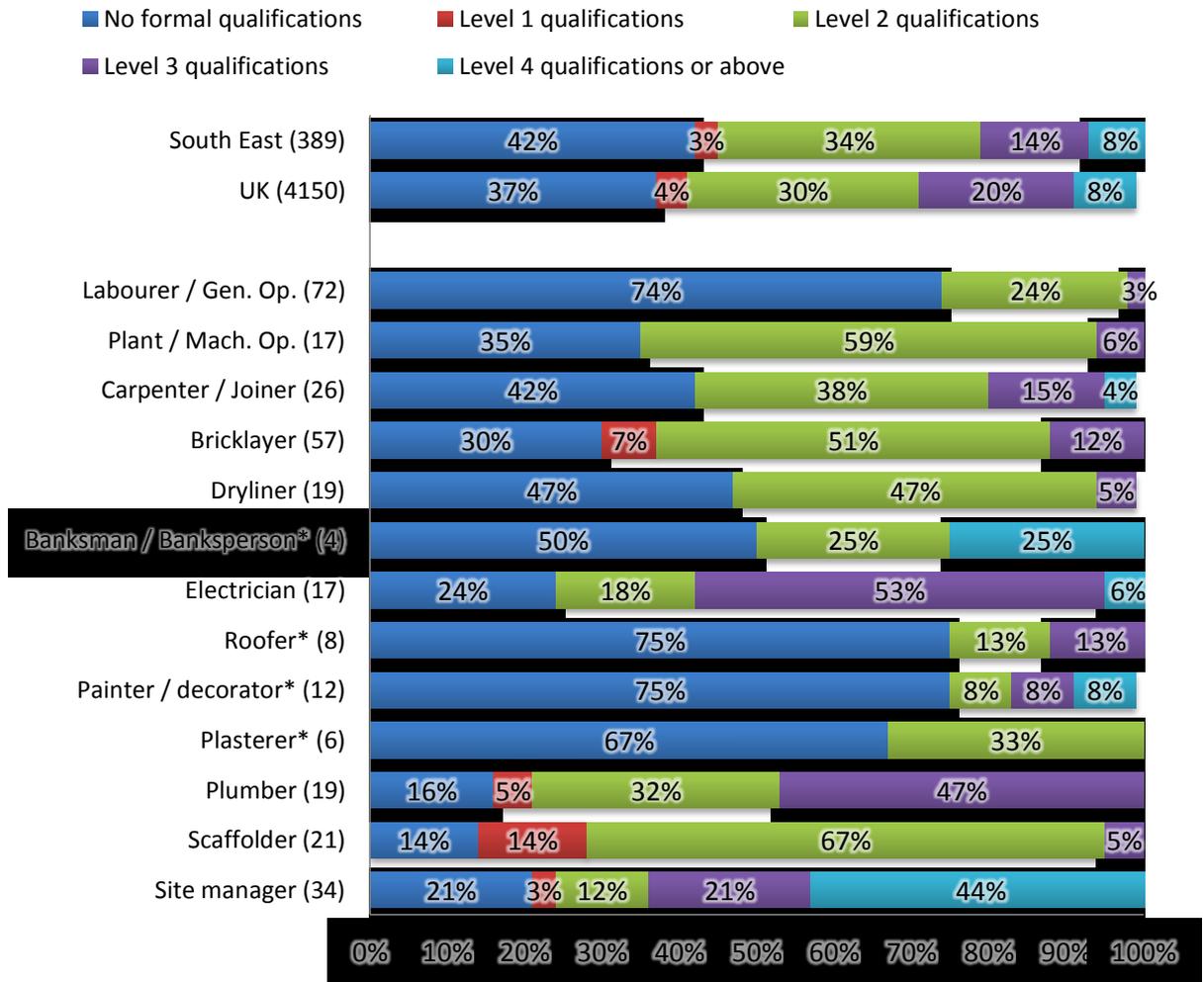
Overall while more than two fifths of construction workers in the South East (42% cf. 38% in 2012 and a 2015 UK average of 37%) have no qualifications, more than half have qualifications equivalent to Level 2 or above (56% cf. 58% across the UK in 2015).

By occupation site managers are most likely to hold the highest level of qualifications; nearly half hold qualifications at Level 4 or above (44%) and a further 21% have Level 3 qualifications. Electricians and plumbers are also more likely than other occupations to hold qualifications equivalent to Level 3 or above (59% and 47% respectively).



Figure 36: Current qualification level, by occupation

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

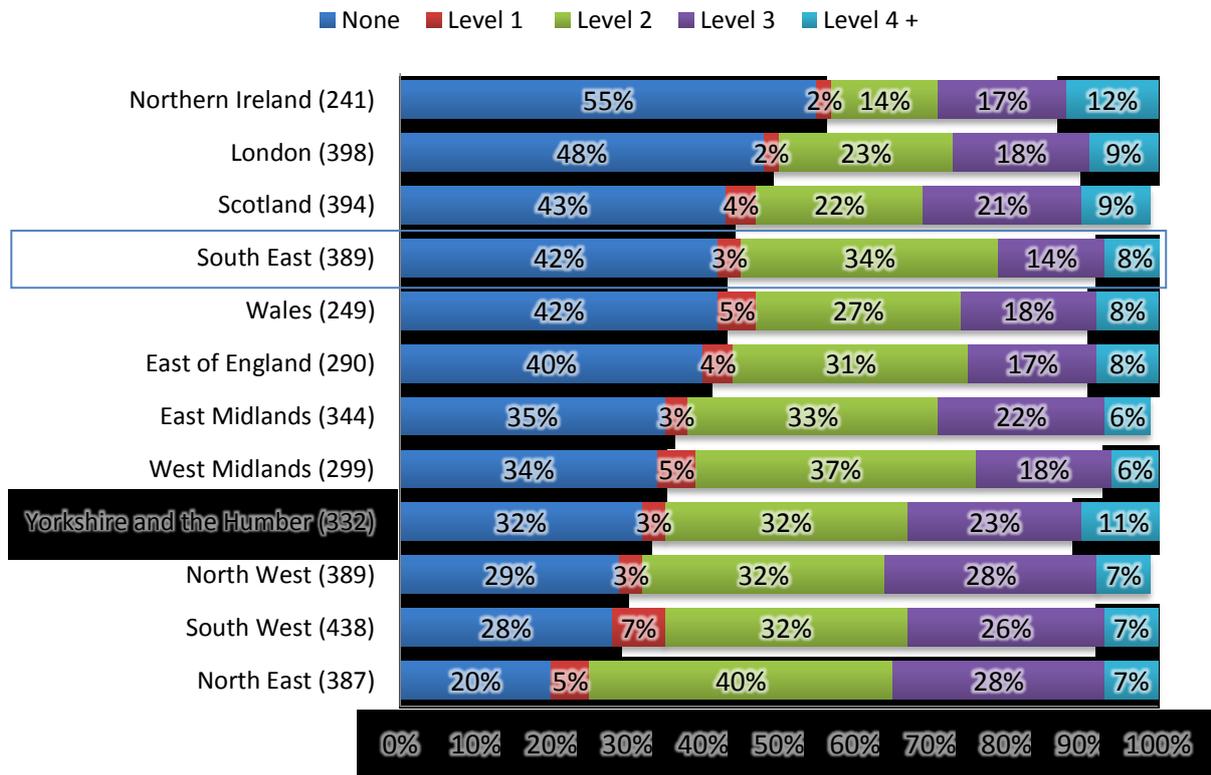


Unweighted bases in parentheses

Analysis by region/nation reveals that while the proportions that hold qualifications at Level 1, or at Level 4 and above, are generally quite similar, the proportions that have Level 2 or 3 qualifications and no qualifications varies quite considerably. These variances are summarised in Figure 37, which highlights that the construction workforce in the South East scores relatively low in terms of the proportion of the workforce with qualifications, similarly to Wales and Scotland.



Figure 37: Current qualification level, by region/nation
 Base: All respondents who provided a valid response



Unweighted bases in parentheses

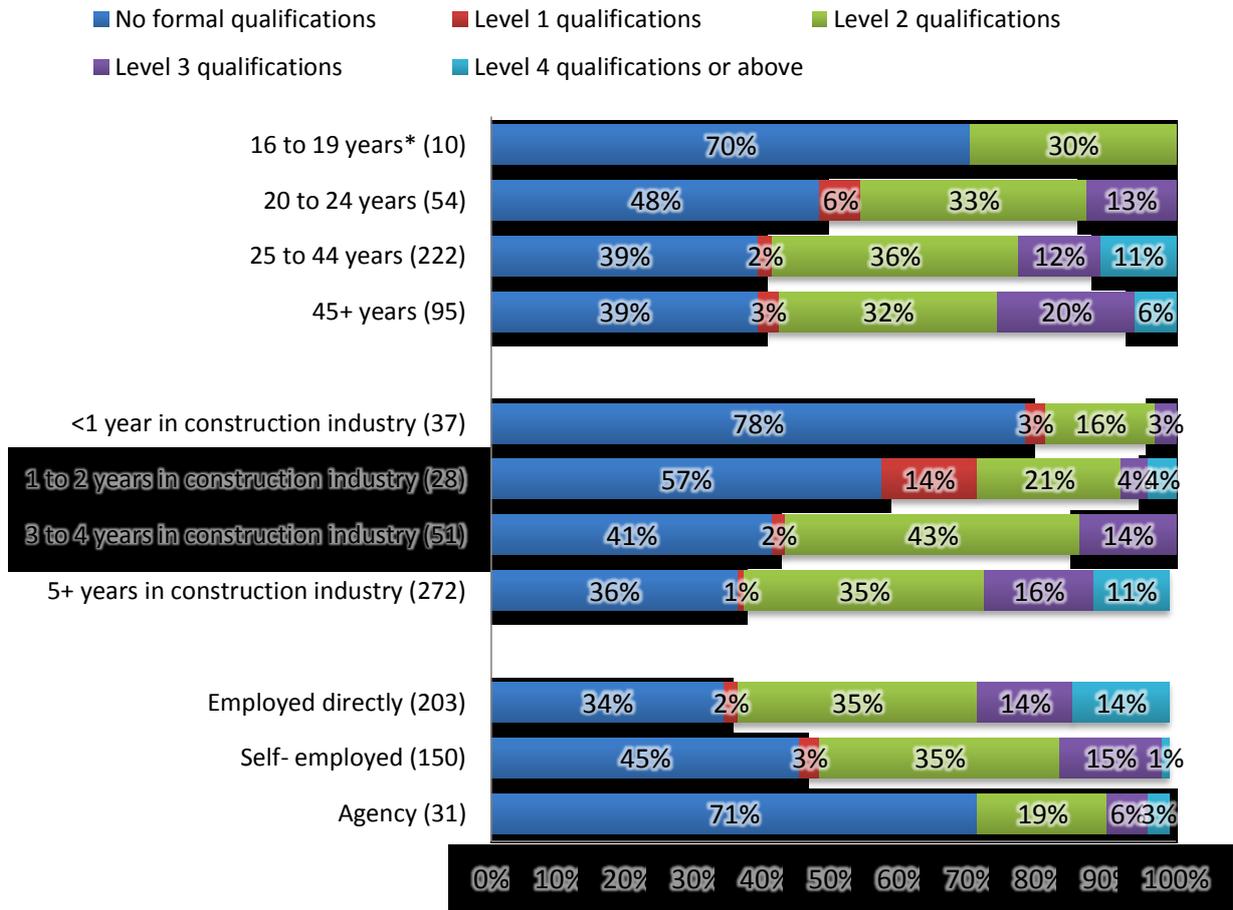
Looking at other sub-groups of construction workers, younger workers are less likely to have any qualifications (70% of 16-19 year olds, 48% of 20 to 24 year olds) and workers over the age of 25 are most likely to have qualifications at Level 3 or 4+ (23% of 25-44 year olds and 26% of 45+ year olds). A similar pattern is evident in terms of length of time in the construction industry, with those having worked in construction for 5+ years more likely than those having spent less time in the industry having qualifications at Level 3 or 4+ (27%, compared with 3% that have less than a year's experience and 8% that have 1 to 2 years experience).

In terms of contract type, as already mentioned, workers who are currently working for an agency (71% have none, compared to 34% and 45%, respectively). In addition workers employed directly by a company are more likely to have higher level qualifications, compared with workers who are self-employed; more than a quarter of workers employed directly have qualifications equivalent to Level 3 or above (28%), compared with 16% of self-employed construction workers. Figure 38 illustrates these variances.



Figure 38: Current qualification level, by other key variables

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



Unweighted bases in parentheses

Geographic mobility

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

- Reasons for working in current location;
- Comparisons of current location, with workers' region/nation of origin;
- Proportion of construction workers' career that has been spent working in the current region/nation;
- Whether 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

As in the 2012 survey all workers were asked what made them decide to work in the region/nation that they are currently working in, although the code frame used for the responses was slightly different. Within the South East the most likely reason for working in the region/nation is because they grew up there/have always lived there (45%), with a further 5% mentioning other reasons to do with their family. Overall family reasons are mentioned to a greater degree than in 2012 (50% cf. 35%).

The next most likely reason for working at their current location is that their employer sent them there (44% cf. 41% in 2012).

Figure 39: Reasons for choosing to work in current location

Base: All respondents

	SE 2015 %	UK 2015 %		SE 2012 %
You grew up here/have always lived here	45	55	Family	35
Family reasons	5	6		
Employer sent you here	44	36	Employer sent me	41
Came to the area to take up this or another job	9	5	More regular opportunities	18
There are more jobs available in this area	6	6	More jobs here	29
Construction work is better paid in this area	3	3	Better paid jobs	23
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	1	1	Prefer living here	14
<i>Unweighted bases</i>	<i>439</i>	<i>4771</i>		<i>420</i>

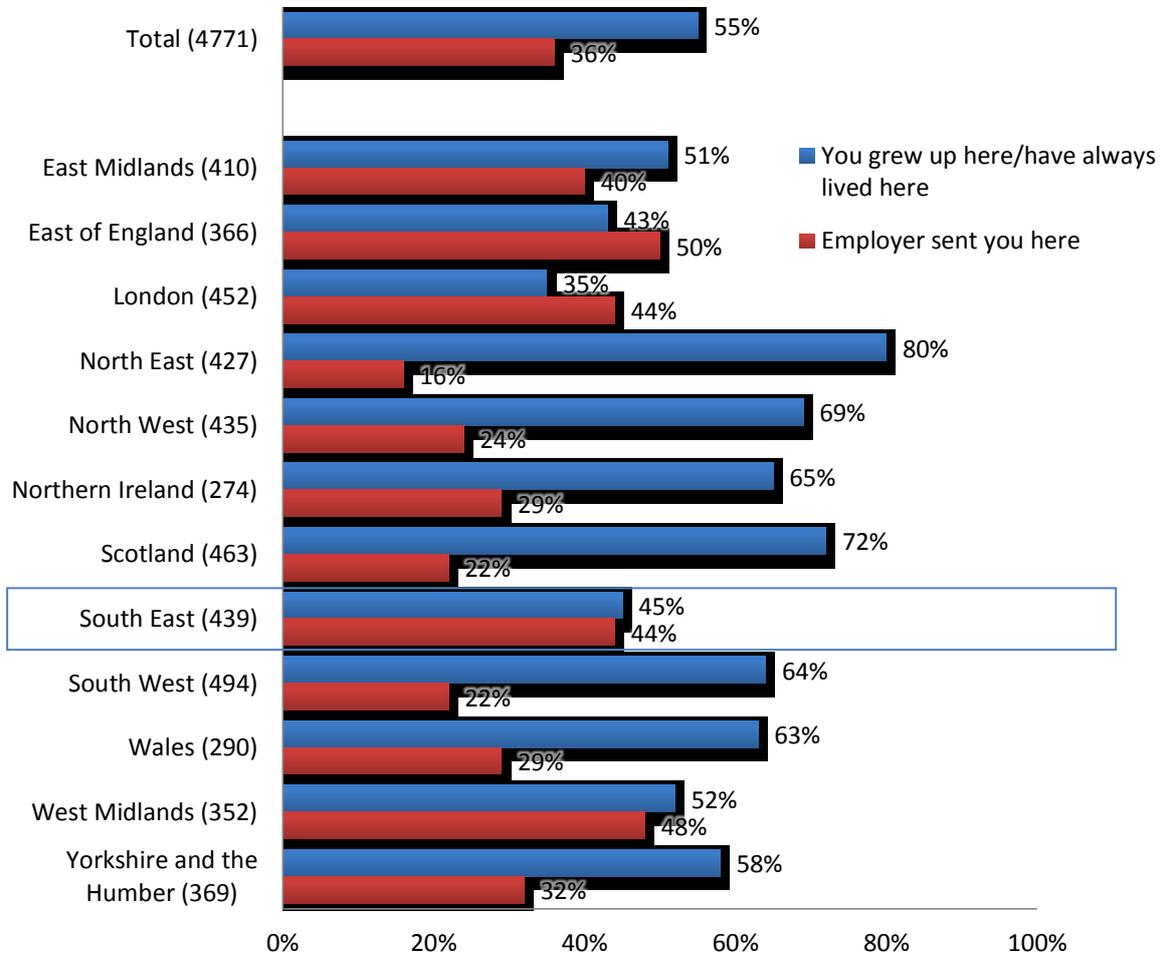
Workers aged 45 and over are most likely to state that they work in their current location because that's where they have always lived/grew up (56%), while younger workers aged 16 to 19 are more likely to say that it is because their employer sent them (73%).

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



Figure 40: Top two reasons for deciding to work in their current region/nation, by region/nation

Base: All respondents



Unweighted bases in parentheses

Around a third of all workers in the South East have worked within the region for their entire construction career (35%), compared with a lower proportion in 2012 (25%). With a further 37% that have remained in this region most of the time, this means the majority of all South East workers have remained in the region for all or most of the time (72%).

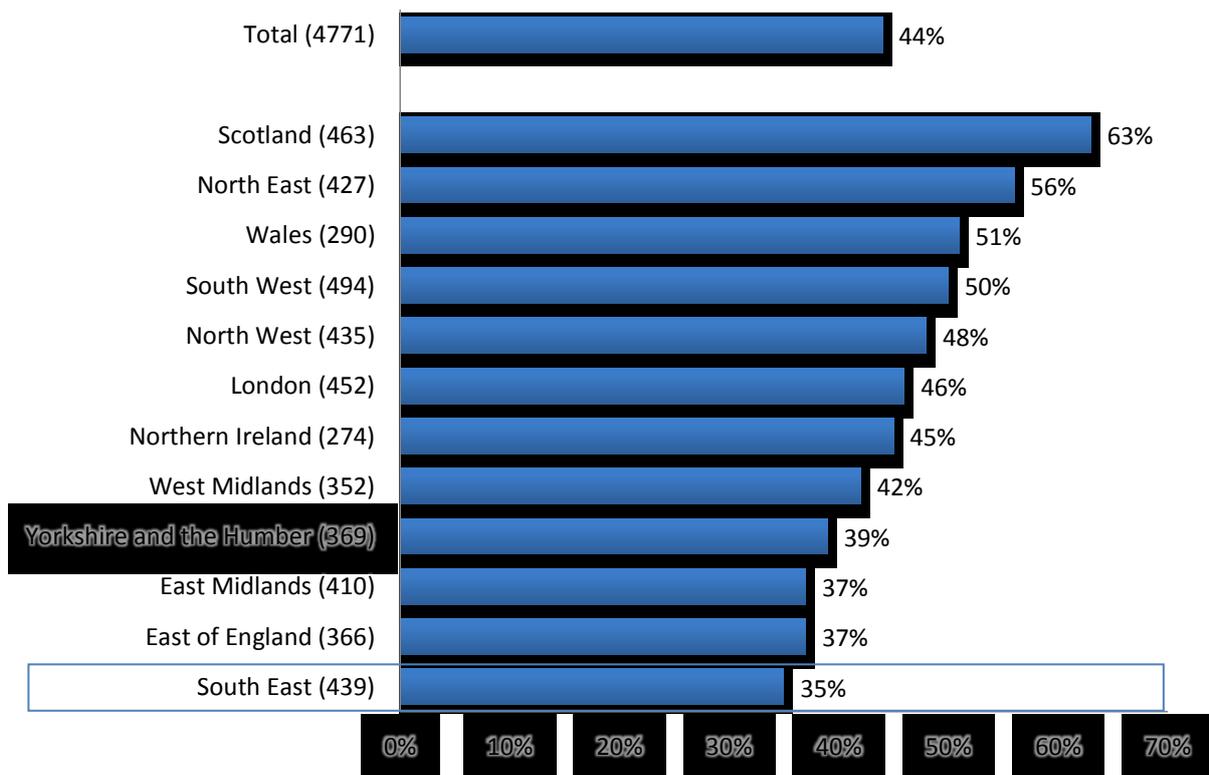


Figure 41: Proportion of construction workers' career worked in current region/nation
Base: All respondents

	SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %
All of your time	35	25	48	44
Most of it	37	33	34	36
Around half your time	11	12	6	8
A small proportion of your time	9	23	8	7
Only on this job (this is the first site you've been to in this region/nation)	5	5	3	3
Don't know	3	1	1	2
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4771</i>

The proportion of construction workers in the South East that have spent all of their time in the region is highest amongst workers aged 20 to 24 years old (60%). There are quite significant variations again by region/nation, but the South East has the lowest proportion of workers that have spent all their time in the region compared to other UK regions/nations.

Figure 42: Proportion of workers that have spent all their time in this current region/nation
Base: All respondents



Unweighted bases in parentheses



In terms of the regions/nations in which workers' current employer operates in, mostly workers reported that their employer operated within the region/nation they were currently working in as shown in Figure 43. The proportion for which this is the case is 65% in the South East, the lowest of all regions/nations in the UK.

Figure 43: Region/nation employer operates in, compared with region/nation working in currently

Base: All respondents

*denotes less than 0.5%

Region/nation employer operates in	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	83	16	8	13	3	2	4	12	8	7	24	11
East of England	12	67	15	11	2	1	4	19	8	7	9	6
London	10	27	84	13	4	1	5	27	12	7	9	6
North East	9	9	8	93	3	1	4	6	7	7	8	15
North West	11	9	8	14	93	1	4	6	7	11	11	10
Northern Ireland	3	3	3	2	1	99	3	2	1	3	2	1
Scotland	6	4	6	9	1	2	97	2	4	4	5	4
South East	13	23	27	12	3	*	4	65	21	7	11	6
South West	9	5	7	10	3	*	4	18	83	10	15	5
Wales	6	5	5	8	3	*	4	3	10	96	14	4
West Midlands	21	9	8	12	6	*	4	7	12	9	92	8
Yorkshire and the Humber	15	10	7	19	4	1	5	6	8	8	8	88
Republic of Ireland	1	2	3	*	*	2	1	1	1	2	2	*
Other parts of Europe	*	*	*	1	0	0	0	0	*	0	1	0
Outside Europe	*	1	0	*	0	0	0	0	*	0	*	0
Other / Unsure	1	3	2	3	2	*	1	3	1	*	1	3
<i>Unweighted bases</i>	410	366	452	427	435	274	463	439	494	290	352	369

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 site is 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 44 illustrates. Construction workers in the South East are amongst those least likely to state that their last site was in the South East (56%), second to the East of England (49%).



Figure 44: Region/nation of last site before this current one

Base: All respondents *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	60	7	*	*	1	0	0	3	1	1	6	4
East of England	5	49	4	1	0	0	0	7	1	1	1	1
London	2	23	77	2	1	4	1	19	4	*	2	1
North East	1	3	0	86	0	0	0	0	0	0	0	6
North West	3	2	1	1	89	1	*	*	1	7	3	2
Northern Ireland	1	1	*	0	*	86	2	0	0	1	*	0
Scotland	1	0	1	3	0	2	94	0	*	1	*	1
South East	6	9	11	1	1	*	*	56	9	1	2	2
South West	*	1	1	*	0	*	0	7	76	2	5	0
Wales	1	1	*	0	1	0	1	*	2	83	3	*
West Midlands	8	1	1	1	3	1	1	1	3	1	75	1
Yorkshire and the Humber	9	2	*	3	1	0	1	0	1	0	*	82
Republic of Ireland	0	*	*	0	0	3	*	*	0	1	1	0
Other parts of Europe	0	0	*	*	*	*	1	*	*	0	*	0
Outside Europe	0	*	0	0	1	1	*	*	*	0	0	0
Other/ Unsure	2	1	1	2	1	1	1	5	2	1	1	*
<i>Unweighted bases</i>	369	332	393	336	357	258	385	392	414	272	322	307

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 more than half of all construction workers in the South East were living in the South East when they started their construction career (55%). There are considerable variations in the extent to which workers have remained in their original locality. As Figure 45 summarises workers currently based in the South East are amongst those least likely to have remained in the same region/nation in which they were based when they started their construction careers.



Figure 45: 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	78	5	*	1	*	0	0	1	*	0	3	3
East of England	2	55	2	0	1	0	0	7	*	0	1	0
London	3	6	50	1	2	0	*	7	1	*	2	*
North East	0	*	1	96	*	0	*	*	1	0	0	2
North West	1	*	*	1	91	0	*	0	1	3	2	2
Northern Ireland	1	1	0	0	0	97	1	1	1	0	1	0
Scotland	1	1	1	1	0	0	96	0	*	0	*	0
South East	2	2	10	0	0	0	0	55	7	0	1	0
South West	*	*	0	0	*	0	0	8	76	0	2	0
Wales	*	1	0	0	1	0	0	0	1	94	2	0
West Midlands	6	*	*	*	2	0	0	1	3	1	84	0
Yorkshire and the Humber	2	3	*	1	1	0	*	0	1	0	0	90
Republic of Ireland	0	0	1	0	*	1	0	1	0	*	1	0
Other parts of Europe	*	1	2	0	*	*	*	6	2	0	1	*
Outside Europe	0	0	*	*	0	0	0	0	*	0	0	0
Other/ Unsure	3	19	8	0	1	*	0	8	5	1	2	2
Outside of UK and ROI	1	5	23	*	1	1	2	4	*	*	0	1
Unweighted bases	318	302	345	386	389	215	409	374	478	231	291	292

Thinking next about where workers studied for their first construction qualification Figure 46 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that once again there are great variations by region/nation and that construction workers in the South East are amongst those most likely to have moved there from another region/nation.



Figure 46: Proportion of construction workers based in the same region/nation as when their first qualification was achieved

Base: Those with a formal qualification

	UK 2015 %	UK 2012 %	Higher than average mentions for other regions/nations
Northern Ireland (142)	96	98	
Scotland (372)	95	86	
North East (348)	92	82	
North West (322)	90	85	
Wales (186)	83	85	
Yorkshire and the Humber (264)	82	83	North East 8%
West Midlands (249)	79	61	
South West (372)	76	72	
East Midlands (289)	65	64	Yorkshire and the Humber 9%
London (262)	58	64	South East 24%,
South East (276)	55	46	London 14%, South West 8%
East of England (251)	50	49	London 20%, South East 9%

Unweighted bases for 2015 in parentheses

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.

As in 2012, more than two fifths of construction workers in the South East are travelling into the region for work from another region/nation in which their current residence is based (42% in 2015, 39% in 2012).



Figure 47: Inter-regional/national movement from permanent residence to current site
Base: All respondents who provided a valid response

	UK 2015			UK 2012		
	% 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 (95)	99	1	0	98	2	2
Scotland (258)	96	4	0	92	8	2
Wales (183)	93	7	5	91	9	6
North East (166)	97	3	1	87	13	13
North West (371)	88	12	12	87	13	12
Yorkshire and the Humber (297)	86	14	14	85	15	13
South West (317)	85	15	11	82	18	17
East Midlands (271)	74	26	23	69	31	27
West Midlands (250)	82	18	16	68	32	24
East of England (303)	63	37	27	67	33	26
London (375)	71	29	25	63	37	30
South East (375)	58	42	38	61	39	36
<i>Unweighted bases for 2015 in parentheses</i>						

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

Construction workers in the South East are the least likely to currently be both living and working in the region as the site they work on (58%).



Figure 48: 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	74	12	1	1	0	0	0	9	*	0	2	7
East of England	2	63	13	0	0	0	0	8	1	0	1	0
London	0	12	71	0	0	0	0	12	1	0	0	0
North East	0	2	0	97	0	0	0	0	0	0	0	5
North West	3	0	0	0	88	0	0	1	*	5	3	2
Northern Ireland	2	*	0	0	0	99	2	1	1	1	0	0
Scotland	0	0	1	1	1	0	96	0	0	0	0	0
South East	3	3	12	0	0	0	0	58	7	0	0	0
South West	*	0	0	0	0	0	0	8	85	0	5	0
Wales	0	1	0	*	3	0	0	0	2	93	6	0
West Midlands	7	1	*	1	8	0	0	1	2	0	82	0
Yorkshire and the Humber	8	1	0	*	1	0	1	0	1	0	*	86
No permanent address	1	3	2	0	0	1	1	1	1	*	*	0
<i>Unweighted bases</i>	275	235	284	314	340	155	314	306	364	206	216	291

Furthest distance worked in last 12 months

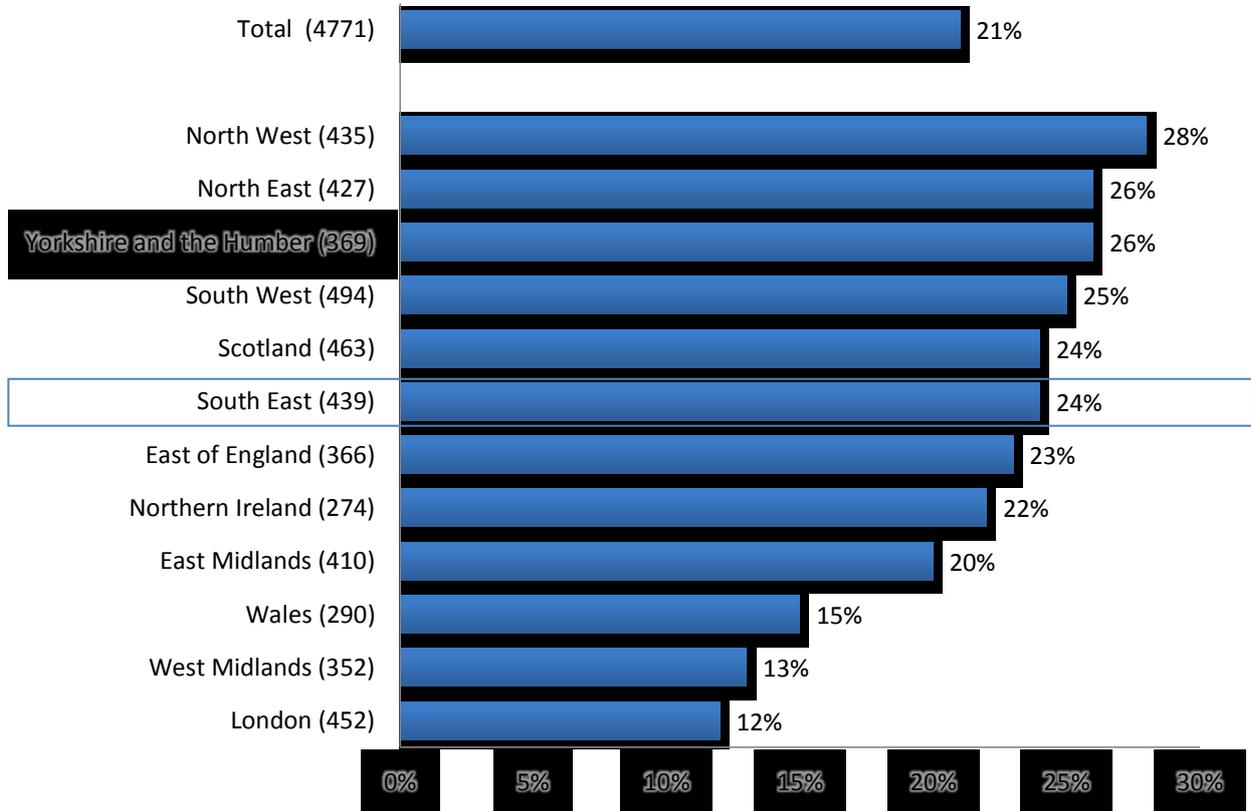
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within the South East, 16% of construction workers have worked no more than 20 miles away and a further 27% have worked between 21 and 50 miles away. This leaves just over half that have worked more than 50 miles away from their permanent home (55%), with 31% that have worked between 51 and 100 miles away and 24% that have worked more than 100 miles away.

Once again there are variations in this regard, with workers based in the South East being broadly similar to the UK average (21%) in terms of the proportion of workers that have travelled 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

Use of temporary accommodation

Nationally, 1 in 20 (6%: as in 2012) construction workers reported that they were currently staying in temporary accommodation while working at their site. The proportion is the same in the South East (6%), following a slight decline since 2012 (8%).



Figure 51: Percentage of workers in temporary accommodation
Base: All respondents

	UK 2015 %	UK 2012 %
Total (4771)	6	6
East of England (366)	11	7
London (452)	8	5
Scotland (463)	7	6
South West (494)	7	3
South East (439)	6	8
East Midlands (410)	5	7
North East (427)	4	7
Wales (290)	4	1
Yorkshire and the Humber (369)	4	3
Northern Ireland (274)	3	1
West Midlands (352)	3	11
North West (435)	2	5
<i>Unweighted bases for 2015 in parentheses</i>		

Journey distance to work

Within the South East, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 27 miles which is less than the average of 37 miles reported in 2012. The South East mean compares to a mean of 22 miles across the UK.

Three in ten (30%) travelled less than 10 miles from their current residence to the site they work, whilst 22% travelled between 10 and 19 miles, 36% travelled between 20 and 49 miles, 7% travelled between 50 and 99 miles and 4% travelled more than 100 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (18% of all construction workers in the South East) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 4% expect to work for another week or so, or less; 4% expect another month; 6% about 3 months; 21% between 6 months and a year and 14% expect to still be working for their current company/agency in more than a year's time. Half of all temporary workers in the South East did not know how much longer they could expect to be working for their current company/agency (50%).

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



Around a fifth of all construction workers in the South East (21% cf. 22% in 2012) do not expect to work on that site for more than a month, including 8% that only expect to be there for about a week or less. More than a quarter anticipated being on site for more than a month, but less than a year (27%), compared with a significantly higher proportion in 2012 (48%). Around 3 in 10 expect to stay on that site for a year or longer (29%), which is a significant increase compared with 2012 (12%), suggesting more stable employment than in 2012. However in a further one fifth of cases (22% cf. 18% in 2012) workers did not know how much longer they could expect to be on site, indicating that a significant minority of temporary workers are living with a certain amount of uncertainty and insecurity.

Amongst the various trades/job roles, scaffolders are most likely to indicate that they expect to work at that site for more than a year (64%); plasterers* are least likely to indicate that this is the case (0%). (*Caution: Small sample base.)

Expected next site location

More than three quarters of all construction workers in the South East are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis (77% cf. 69% in 2012). The remaining quarter of workers, in aggregate, are sure that this will not be the case (3%); that it depends where the work is (15%); or that they don't know (4%).

Construction workers who have worked in construction for the longest period of time are more likely to be confident of this (78% of those who have worked in the industry for 3+ years, cf. 71% of those who have worked in construction for under a year). By trade/occupation, site managers are most confident (100%).

Workers that are certain that their next job will not be within commuting distance of their permanent home were asked to indicate which region/nation they expect to be working in next. The following figure summarises their responses by region/nation (although the base sizes within each region/nation are very small, so some caution is needed) and it gives an indication of the likely pattern of movement between regions/nations. Again, construction workers in the South East that do not expect to be able to commute daily to their next job are those least likely to expect to remain in the region/nation for their next job.



Figure 52: Expected location of next site/job

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

Expected location of next job	Region/nation currently working in											
	EM	EE	GL	NE	NW	NI	SC	SE	SW	WA	WM	YH
East Midlands	61	0	0	0	0	0	0	14	0	0	0	0
East of England	0	40	15	0	0	0	0	7	0	6	8	10
London	6	20	60	10	0	0	0	14	0	6	0	0
North East	0	6	0	85	0	0	0	0	0	0	0	20
North West	6	3	0	0	83	8	0	0	0	6	0	0
Northern Ireland	0	0	0	0	0	69	0	0	0	0	0	0
Scotland	0	0	0	0	0	0	75	0	8	0	0	0
South East	11	6	15	0	8	0	0	29	8	6	0	0
South West	0	3	0	0	0	0	0	7	77	6	0	0
Wales	0	3	0	0	0	0	0	0	0	69	8	0
West Midlands	11	9	0	0	0	0	0	0	8	0	58	10
Yorkshire and the Humber	0	3	0	0	0	0	0	0	0	0	0	50
Outside Europe	0	3	0	0	0	8	0	7	0	0	0	0
Other / Unsure	6	6	10	5	8	15	25	21	0	0	25	10
<i>Unweighted bases</i>	<i>18</i>	<i>35</i>	<i>20</i>	<i>20</i>	<i>12</i>	<i>13</i>	<i>12</i>	<i>14</i>	<i>13</i>	<i>16</i>	<i>12</i>	<i>10</i>

Sub-sector and sector mobility

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

Sub-sector mobility

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

Compared with 2012 the proportion of construction workers that have been working on several types of projects has fallen, most notably public non-housing work (from 60% to 33%), commercial work (from 51% to 35%), private industrial work (from 43% to 30%) and infrastructure projects (32% to 21%).

Overall nearly half of all construction workers have only worked on one project type (47%), compared with 1 in 6 in 2012 (18%), which suggests a pattern of increased stability in the sector.



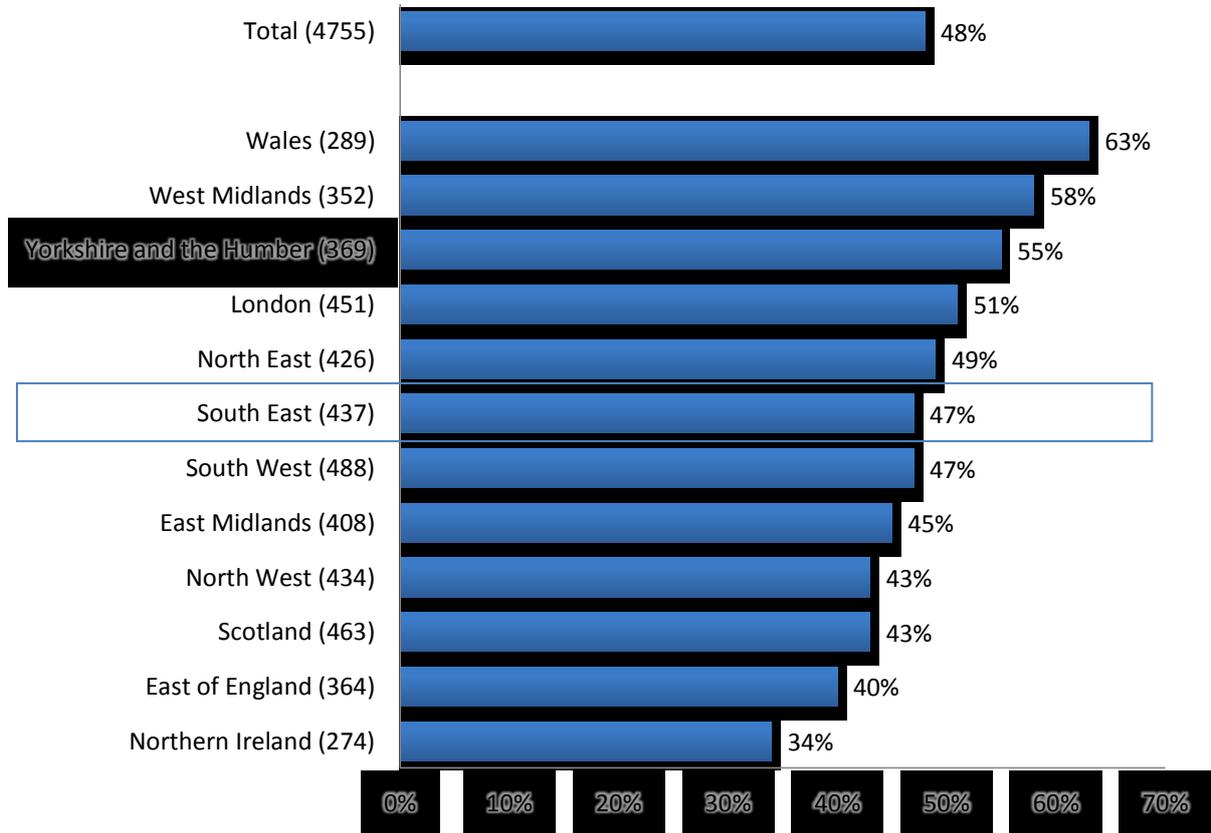
Figure 53: Type of projects spent significant periods on
Base: All respondents

	SE 2015 %	SE 2012 %	SE 2007 %	UK 2015 %
New housing	84	82	95	83
Housing repair and maintenance including extensions/loft conversions	41	47	44	36
Commercial work such as shops, office, pubs etc	35	51	44	35
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	30	43	31	30
Public non-housing work such as schools, sports facilities, landscaping	33	60	42	33
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	21	32	20	21
ONE TYPE ONLY	47	18	30	48
TWO TYPES	12	22	24	14
THREE TYPES	13	17	12	11
FOUR TYPES	6	13	15	8
FIVE TYPES	9	16	13	9
SIX TYPES	11	11	6	9
<i>Unweighted bases</i>	<i>439</i>	<i>420</i>	<i>331</i>	<i>4771</i>

The number of project types worked on varies significantly by region/nation, as Figure 54 illustrates. The South East as a region is on par with the South West (47%) and in line with the UK average (48%) in terms of the proportion of construction workers working on one project type.



Figure 54: Proportion of workers that have only worked on one project type
Base: All respondents



Unweighted bases in parentheses

The likelihood that workers have worked only on one project type declines, as age increases, as one would expect (from 64% of 16 to 19 year olds and 72% of 20 to 24 year olds to 34% of 45+ year olds). By current trade/occupation, dryliners (81%) are most likely to have only worked on one project type, while painter/decorators* (15%) and site managers (16%) are least likely. However, site managers (24%) are more likely to have worked on six project types, alongside plasterers (29%*). (*Caution: Small sample base.)



Figure 55: Number of sub-sectors worked in, by occupation

Base: All respondents

	Unweighted bases	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Banksman/banksperson*	5	60	20	20	0	0	0
Dryliner	21	81	0	10	0	0	5
Labourer / Gen. Op.	80	56	13	11	6	8	5
Scaffolder	22	59	0	0	14	9	18
Plasterer*	7	29	43	0	0	0	29
Bricklayer	59	42	8	8	3	22	14
Plumber	22	55	9	14	0	18	5
Plant / Mach. Op.	26	38	12	15	4	8	19
Carpenter / Joiner	27	44	11	15	15	11	4
Roofer*	8	38	25	25	13	0	0
Painter / decorator*	13	15	38	15	8	0	23
Site manager	37	16	16	24	8	11	24
Electrician*	17	65	6	6	6	6	6

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. Within the South East, more than two fifths of construction workers say they definitely will be (43%); a similar proportion think it is very or quite likely (42%); 5% consider it unlikely; just 2% say they definitely won't be and a further 2% hope to be retired by then, while 7% don't know.

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 43% believe they will definitely want to be working in the construction sector, 30% believe it is very likely they will want to be working in the construction sector and 13% believe it is quite likely they will want to be working in the construction sector. Only 8% 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 (16%).



The South East construction workforce 2014-15 summary

Across the wide range of issues covered within the 2015 survey it seems there are a number of signs of increased stability amongst the UK construction workforce and this is reflected in the South East. Since 2012 there has been an increase in the proportion of workers employed directly by companies (from 30% to 53%) and a corresponding decrease in the proportion that are self-employed (from 61% to 38%).

There has also been an increase in the proportion of South East construction workers that expect to stay on the site they are currently working on for a year or longer (from 12% to 29%).

In terms of project type there has also been increased stability, with nearly half of all construction workers in the South East that have worked on just one project type (47%), compared with 1 in 6 in 2012 (18%).

Some uncertainty does however remain with half of temporary workers not knowing how much longer they can expect to be working for their current employer/agency (50%) and almost a quarter of all workers not knowing how much longer they can expect to be on their current site (22%).

In terms of skills and qualifications it is encouraging to note that virtually all workers continue to hold some form of skill card or certificate, with the proportion in the South East being slightly higher than the UK average (98%, compared with 96%).

More than half of all construction workers in the South East (58%) hold some form of qualifications and this proportion is not far behind the UK average (63%). There has been a significant increase in the proportion of workers with Apprenticeships since 2012 (from 1% to 25% of those with qualifications), and this is significantly higher than the UK average (13%). The majority of all construction workers in the South East hold qualifications equivalent to Level 2 or above (56% cf. 58% across the UK).

One in ten South East construction workers are currently working towards a qualification (10% cf. 12% across the UK) and one in seven believes they would benefit from training in basic skills (14%, the same as across the UK).

In terms of mobility, compared with workers in other regions/nations, those in the South East are the amongst the most mobile (55% remained in the South East after doing their first qualification/training in) and the least 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 (77%).

Around a quarter of South East construction workers (24%) have travelled 100+ miles to construction sites for work in the last 12 months. In this respect, workers based in the South East are broadly similar to workers across the UK as a whole (21%).



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