

Workforce Mobility and Skills in the UK Construction Sector 2015

Wales Report





Study prepared by BMG Research from a commission by CITB.

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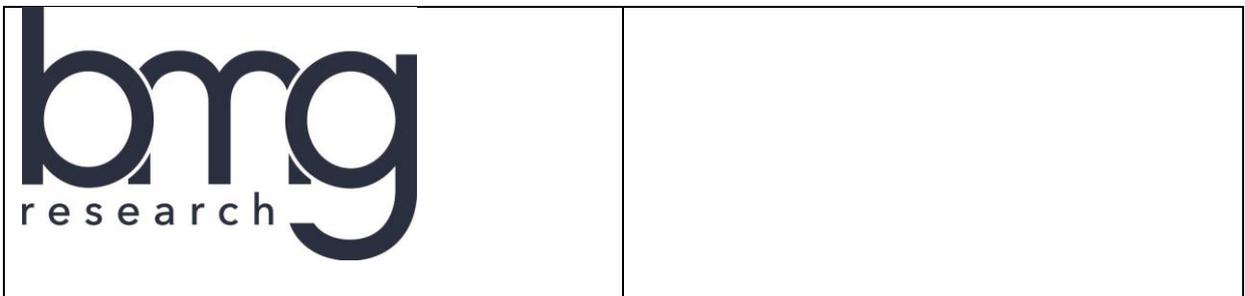




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Executive summary

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 290 interviews were conducted with construction workers in Wales.

Profile of the sample

- Nearly half of construction workers interviewed in Wales are aged 35 and under (47%), which is a higher proportion than compared with the UK population as a whole (37%), but in line with the UK average in the survey (47%). Compared to 2012, there are more workers aged 35 to 55 (44% cf. 39%), while 6% of construction workers are aged 55 to 59 and just 3% are aged 60 or over.
- Overall 2% of the construction workforce in Wales is of BME origins, compared with 3% in the Wales population as a whole. The UK average in the survey is 4%, increasing to 15% in London.
- By trade/occupation, the highest proportion of the sample in Wales is accounted for by labourers/general operatives (22%), followed by bricklayers (13%) and ground workers (12%). Compared with 2012 there has been an increase in ground workers (from 0% to 12%) and site managers (from 0% to 10%), and a decrease in carpenters/joiners (from 15% to 9%) and electricians (from 8% to 3%).
- Just over a fifth of all those interviewed in Wales perform a supervisory or management role on their site (22%), slightly less than the UK average (25%).
- Two thirds of construction workers interviewed for the survey are employed directly by a company (66%), which represents an increase compared with 2012 (56%). This proportion is also significantly greater than the UK average (54%). At the same time, the proportion of self-employed workers has fallen since 2012 (from 43% to 27%); while the remainder of workers work for an agency (6% cf. 1% in 2012). The likelihood of being self-employed increases with time spent working in construction, from 9% of those that have worked in construction for less than a year to 31% of those that have been working in the industry for 5+ years.
- Around a fifth of all construction workers in Wales (19%) are employed on a temporary, rather than permanent basis. This is a slightly lower proportion than the UK average (23%).
- Construction workers in Wales work an average of 43 hours per week. One in eight work more than 50 hours per week (12%), a significantly lower proportion than the UK average (23%).

Work history

Time in the sector

- A third of all construction workers in Wales have worked in the industry for at least 20 years (34%), which compares with a lower UK average (31%). A total of 55% have done so for 10+ years.



- Almost two thirds of construction workers in Wales have only ever worked within the construction industry (63%), slightly fewer than the UK average (70%) but a significant increase since 2012 (50%). More than half of construction workers in Wales have worked pretty much continuously, without spells out of work (53% cf. 55% across the UK).

Previous non-construction jobs

- Amongst the 22% of construction workers in Wales that worked in another sector before starting work in construction, the sectors worked in beforehand are most likely to be either the manufacturing sector (30%) or the wholesale/retail sector (23%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trades occupations (31%), followed by elementary administration and service occupations (20%) and process, plant and machine operatives (16%).

Occupational switching within the construction sector

- Just over a third of all construction workers in Wales have worked in more than one trade or occupation whilst working in the construction industry (35%), a significant increase since 2012 (23%). The proportion that has worked in more than one role is significantly higher amongst workers with Level 4+ qualifications (62%) and those in a supervisory or management role (51%).
- Workers are most likely to have previously worked as a labourer/general operative (34%); while 1 in 6 have worked as a bricklayer (17%) or as a plant/machine operative (16%).
- Thinking about their future plans in the construction sector, almost three quarters of construction workers in Wales would like to carry on in the same trade or occupation (73%), while 1 in 10 would like to change their trade/occupation (10%) and a further 1 in 12 would like to leave the construction altogether (8%). The proportion that wants to carry on as they are is lower in Wales than the UK average (79%).
- The most popular occupation that construction workers in Wales would like to change to is site manager (18% of those who would like to change).
- In 7 out of 10 cases where construction workers in Wales would like to change trade/occupation they believe they will require further training or qualifications in order to do so (71%). 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 (46%), while 43% believe this kind of work will make better use of their skills or abilities.

Qualifications and skills

Skills cards/certificates

- The vast majority of all construction workers in Wales, as across the UK as a whole, hold some form of construction skill card or certificate (92% in 2012 and 2015). This is lower than the UK average (96%).



- A higher proportion of younger workers (100% of 16-19 year olds) and those who have worked in construction for less than a year (91%) hold a skill card or certificate compared to 2012 (65% and 60%, respectively).
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (83% in Wales; 86% across the UK).
- Card colours vary by occupation and by age; younger workers are more likely to hold Red Trainee cards (47% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue cards (40% of 45+ year olds).

Construction-specific qualifications

- Three quarters of construction workers in Wales say they had no formal qualifications when they first started working in the construction industry (76% cf. 75% across the UK).
- By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst dryliners and banksmen (all of the small sample in these occupations) and plant/machine operatives (96%), whilst plumbers (31%) are least likely to have started with no formal qualifications.
- Compared with around a quarter of construction workers in Wales that did have qualifications when they first started working in construction, overall more than half of all construction workers reported holding some sort of construction related qualification at the time of interview (58% cf. 63% across the UK). This is significantly fewer than in 2012 (70%).
- The proportion of workers that currently hold any qualifications is lower than average amongst workers aged 45+ (45%).
- By trade/occupation, site managers are most likely to hold qualifications (87%), whilst trades less likely to hold formal qualifications include those working as labourers/general operatives (38%) and plant/machine operatives (39%).
- The qualifications most likely to be held by construction workers in Wales are NVQ/SVQ qualifications (63% of those with qualifications) and this is a similar proportion to that reported in 2012 (67%) and the UK average (66%). Around 1 in 5 construction workers with qualifications hold City & Guilds qualifications (21% cf. 23% in 2012 and 20% across the UK in 2015). As has been the case previously, significantly fewer construction workers in Wales hold an apprenticeship (2%) compared to the UK average (13%).

Basic skill needs

- One in six construction workers in Wales believe they would benefit from some form of training in basic skills (18% cf. 15% in 2012 and 14% across the UK in 2015).
- In terms of the type of training required, 13% believe they would benefit from training in maths, 8% in reading, 6% in writing and 3% in speaking English.



Current study for qualifications

- One in eight construction workers in Wales are currently working towards any formal qualifications relevant to the construction industry (12% cf. 13% in 2012 and a UK average of 12%). This proportion is significantly higher amongst 16-19 year olds (60%) and amongst those who have worked within the construction industry for less than two years.
- Amongst workers with no qualifications, 1 in 9 is currently working towards one (11%).
- Over half of those who are working towards qualifications are working towards qualifications equivalent to Level 3 (56%), and a further fifth are working towards Level 2 qualifications (19%).

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 (55%; 53% across the UK), while nearly a quarter would like to do so (23%; 26% across the UK) and just over a fifth are unsure (21%; the same across the UK).
- More than a quarter of construction workers in Wales (28% cf. 25% across the UK) and more than four fifths of those who have had some form of supervisory or management responsibilities (84% cf. 50% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.
- In-house training (45%) and SMSTS (41%) are the types of training most likely to have been received, followed by a Site Safety Supervisors Course (24%).

Overall skill levels

- The vast majority of construction workers in Wales (96%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 4% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. Just under a third of construction workers in Wales (32%) hold a skill card/certificate, but have no other construction qualification. This compares with the UK average of 30%.
- Overall, while just over two fifths of construction workers in Wales have no qualifications (42% cf. 30% in 2012 and a 2015 UK average of 37%) the majority have qualifications equivalent to Level 2 or above (53% cf. 60% in 2012 and 58% across the UK in 2015). By occupation, site managers are most likely to hold the highest level of qualifications; almost two thirds hold Level 4+ qualifications (65%) and a further 13% have Level 3 qualifications.

Geographic mobility

Work history in the region/nation

- The fact that they grew up there/have always lived there and other family reasons are the most likely reasons why construction workers are based in Wales (70%) and this proportion is higher than in 2012 (61%), as well as being higher than the 2015 UK average (55%). The second main reason for their location is due to their employer sending them there (29% cf. 36% across the



UK). Reasons differ particularly by age with younger workers more likely to say that they work in their current location because their employer sent them.

- In 2015, a higher proportion of construction workers in Wales compared with 2012 have worked there for their entire construction career (51% cf. 40% in 2012) and the majority of construction workers in Wales have remained there for all or most of their career (85%). This compares with a UK average of 80%.
- Thus, in the majority of cases, the last site workers were based at was also in Wales (83%).

Worker origins

- Most construction workers in Wales were interviewed in the same location in which they were living in when they started their construction career (94%). This compares with the lowest proportion in London (50%) and highest in Northern Ireland (97%).
- More than four fifths of construction workers in Wales (83%) have remained in the same location as they did their first qualification/training in. Compared with other regions/nations, workers in Wales are the fifth least mobile. The highest proportion by region/nation is 96% in Northern Ireland, followed by 95% in Scotland and 92% in the North East. At the lower end of the range, only around half of construction workers in the East of England (50%), South East (55%) and London (58%) are based in the same region/nation as where their first qualification was achieved.

Travel to site

- Around two fifths of construction workers in Wales have travelled at least 50 miles from their permanent/current home to work in the last 12 months (42%). Across the regions/nations, construction workers in Wales are amongst those least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (15% cf. 21% across the UK).
- Overall just 4% of construction workers in Wales are currently staying in temporary accommodation while working at their site. This proportion is slightly lower than the UK average (6%) and on par with the North East and Yorkshire and the Humber (both 4%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 16 miles, which is less than in 2012 when workers travelled an average of 26 miles, and less than the UK average of 22 miles.

Site duration and change

- More than a third of all temporary workers in Wales (36%) do not know how much longer they can expect to be working for their current company/agency. This compares with a UK average of 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, nearly two fifths expect to stay on that site for a year or longer (38% cf. UK average of 26%), which is a significant increase compared with 2012 (26%), suggesting some improvement with regard to stability. However in a



further fifth of cases (20% cf. 32% 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.

- Around 7 in 10 construction workers in Wales 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 (71% cf. 74% in 2012). The remaining third say it depends/they don't know or that they won't be able to commute.

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 a variety of projects in Wales, most notably public non-housing work (from 50% to 18%), housing repair and maintenance (from 46% to 22%), commercial work (from 45% to 21%) and private industrial work (from 36% to 21%). However, nearly two thirds of all construction workers have only worked on one project type (63%), compared with just 1% in 2012, which suggests a pattern of increased stability in the sector.
- The number of project types worked on varies significantly by region/nation. Wales is most likely to report its' construction workers working on one project type (63% cf. 48% across the UK), while Northern Ireland is the least likely (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 Wales, 30% say they definitely will be; 51% think it is very or quite likely; 6% consider it unlikely; just 3% say they definitely won't be and a further 3% hope to be retired by then, while 6% 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, 290 interviews were conducted in Wales.



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 WA is used to represent Wales in the tables that are 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 just over a fifth of construction workers (22%), just as they did in the previous survey in 2012 (21%). The proportion of workers aged 25 to 34 years (25%) has fallen slightly since 2012 (29%), while the proportion aged 35 to 55 has increased since 2012 (44%, compared with 39% in 2012). There is a similar proportion of workers aged 55 and over (9%, compared with 11% in 2012). Workers aged 60 and over account for just 3% of construction workers.

Compared with the UK workforce, overall a higher proportion of construction workers are aged under 35 years (47% in Wales and 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

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % | | UK Workforce* % |
|-------------------------|--------------|--------------|--------------|--------------|----------------|-----------------------|
| 16 to 19 years | 5 | 4 | 8 | 5 | 16 to 19 years | 4 |
| 20 to 24 years | 17 | 17 | 18 | 13 | 20 to 24 years | 10 |
| 25 to 34 years | 25 | 29 | 22 | 29 | 25 to 34 years | 23 |
| 35 to 44 years | 20 | 22 | 31 | 22 | 35 to 49 years | 34 |
| 45 to 54 years | 24 | 17 | 13 | 20 | 50 to 64 years | 26 |
| 55 to 59 years | 6 | 11 | 8 | 6 | | |
| 60+ years | 3 | | | 4 | 65+ years | 3 |
| <i>Unweighted bases</i> | <i>290</i> | <i>428</i> | <i>293</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, the vast majority of construction workers in Wales are of White origins (97%, compared with 100% in 2012). Within this proportion 2% describe themselves as White Irish and the same proportion describe themselves as 'White Other' (2%).

Workers of Black (<0.5%) and Asian (<0.5%) ethnic origin (BME) make up similar proportions of the sample as in 2012.

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

Base: All respondents

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % | UK Population aged 16-64* % |
|-------------------------|--------------|--------------|--------------|--------------|-----------------------------------|
| White | 97 | 100 | 99 | 94 | 87 |
| Black | <0.5 | <0.5 | 1 | 2 | 3 |
| Asian | <0.5 | 0 | 0 | 1 | 5 |
| Other/Not stated | 2 | <0.5 | 0 | 3 | 5 |
| <i>Unweighted bases</i> | <i>290</i> | <i>428</i> | <i>293</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 2% of construction workers in the Wales sample are BME, compared with a higher incidence of 4% of the UK sample and 3% across the 16-64 age population in Wales.

Compared with other regions/nations, Wales has a low 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 | |
| <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 most construction workers in Wales have lived in the UK all of their life (94%). This proportion is significantly higher than the UK average (84%).

Amongst all construction workers in Wales, 1% indicate that they have a long term illness, health problem or disability which limits the type of work they can do. This was either a hearing or vision problem. Across the UK, 3% of construction workers indicate they have a long term illness, health problem or disability and the most common condition is a reduced physical capacity (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 Wales (reflecting the profile across the UK), followed by bricklayer and ground worker. Within Wales, there has been an increase in the proportion that are ground workers (12% cf. 0% in 2012) and site managers (10% cf. 0% in 2012). At the same time, the proportion of carpenters/joiners has decreased since 2012 (9% cf. 15% in 2012); this is also true for electricians (3% cf. 8% in 2012). The occupational profile in Wales is similar to that of the UK



as a whole, apart from a higher proportion of ground workers in Wales (12% cf. 4% across the UK).

Figure 5: Occupational profile

Base: All respondents

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % |
|---|--------------|--------------|----------------|--------------|
| Labourer/General operative | 22 | 27 | 18 | 18 |
| Bricklayer | 13 | 10 | 8 | 15 |
| Ground worker | 12 | 0 | 0 | 4 |
| Site manager | 10 | 0 | 0 | 8 |
| Carpenter/joiner | 9 | 15 | 17 | 11 |
| Plant/machine operative (e.g. Fork lift/JCB) | 8 | 8 | 13 | 7 |
| Plumber | 7 | 9 | 3 | 5 |
| Electrician | 3 | 8 | 6 | 5 |
| Painter/decorator | 3 | 4 | 3 | 3 |
| Scaffolder | 3 | 3 | 3 | 4 |
| Dryliner | 3 | 3 | With plasterer | 3 |
| Banksman/banksperson | 2 | <0.5 | 3 | 2 |
| Technical e.g. surveyor, maintenance technician | 2 | <0.5 | 2 | 2 |
| Fencer | 1 | 0 | 0 | <0.5 |
| <i>Unweighted bases</i> | 290 | 428 | 293 | 4771 |

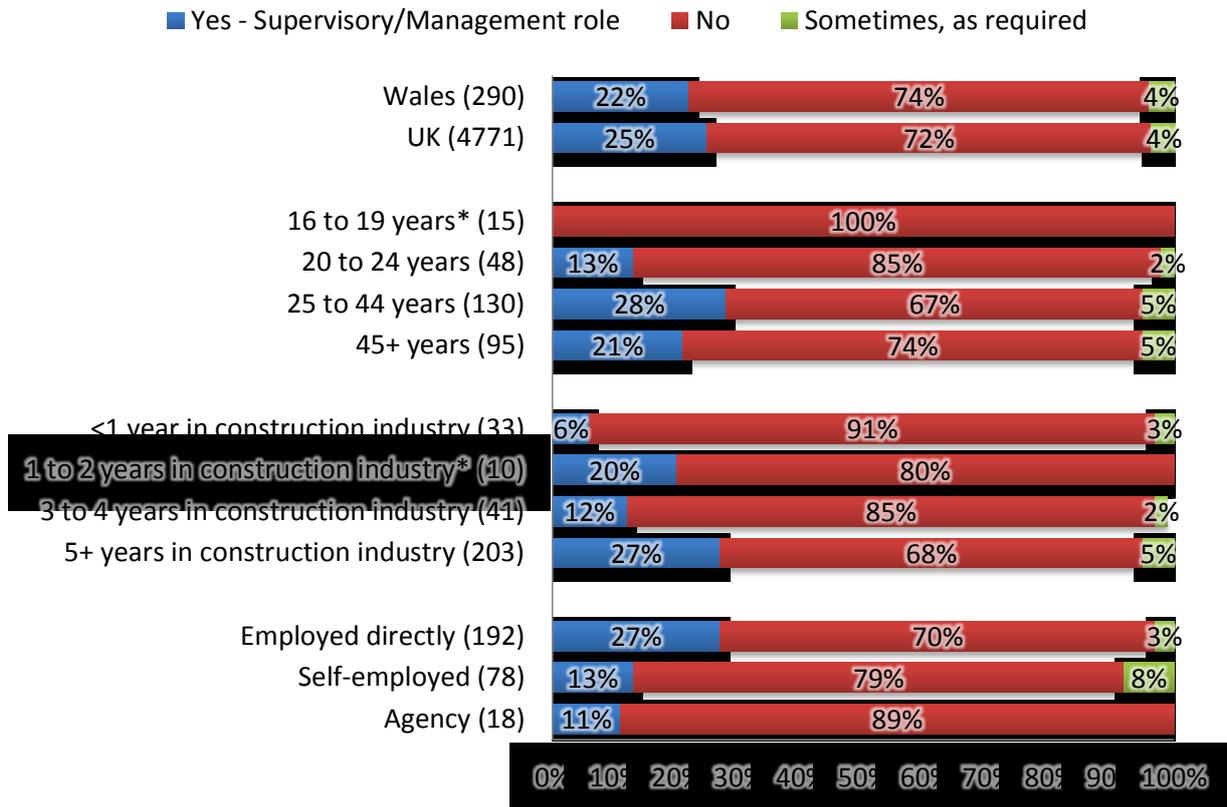
Supervisory roles

Just over a fifth of all construction workers in Wales interviewed for the 2015 survey say they perform a supervisory or management role on their site (22%). This is slightly lower 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 (27%) are significantly more likely than those that are self-employed (13%) or work for an agency (11%) 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

Two thirds of construction workers in this year's Wales sample are directly employed by a company (66%) and this has increased compared with 2012 (56%).

The next highest proportion of construction workers within Wales is self-employed (27%), which is lower than in 2012 (43%). The proportion of workers who are self-employed increases amongst respondents who have been working in the construction sector for longer (31% amongst those with 5+ years experience, compared with 9% amongst those who have worked in the industry for less than a year).

Just 6% of the sample is accounted for by construction workers who are working for an employment agency, although the proportion is higher amongst those who have only been working in the construction industry for up to 5 years. This is summarised in the following table.



Figure 7: Employment status

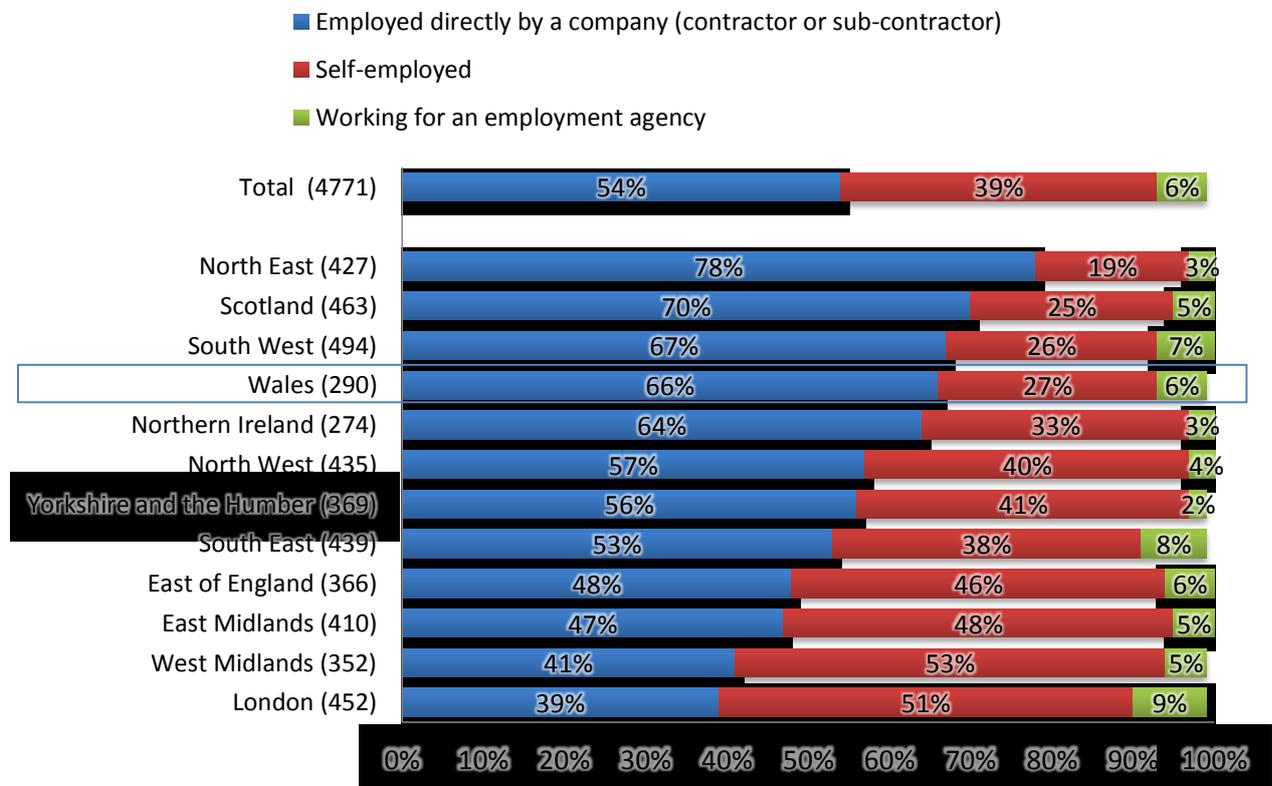
Base: All respondents *caution: small sample base

| | WA 2015 | WA 2012 | UK 2015 | Years working in construction | | | |
|---|---------|---------|---------|-------------------------------|-----|-----|------|
| | % | % | % | <1 | 1-2 | 3-4 | 5+ |
| Employed directly by a company (contractor or sub-contractor) | 66 | 56 | 54 | 79 | 70 | 66 | 65 |
| Self-employed | 27 | 43 | 39 | 9 | 20 | 22 | 31 |
| Working for an employment agency | 6 | 1 | 6 | 9 | 10 | 12 | 4 |
| Working on some other basis | 1 | 0 | <0.5 | 3 | 0 | 0 | <0.5 |
| <i>Unweighted bases</i> | 290 | 428 | 4771 | 33 | 10* | 41 | 203 |

The proportion employed directly is higher in Wales than the UK average (66%, compared with 54%), while the proportion that are self-employed is lower (27%, compared with 39%).

Figure 8: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses

Employment contract basis

Overall, around a fifth of construction workers in Wales (19%) are employed on a temporary, rather than permanent basis (78%). The remainder believed they had another type of contract arrangement (1%) or refused (2%).

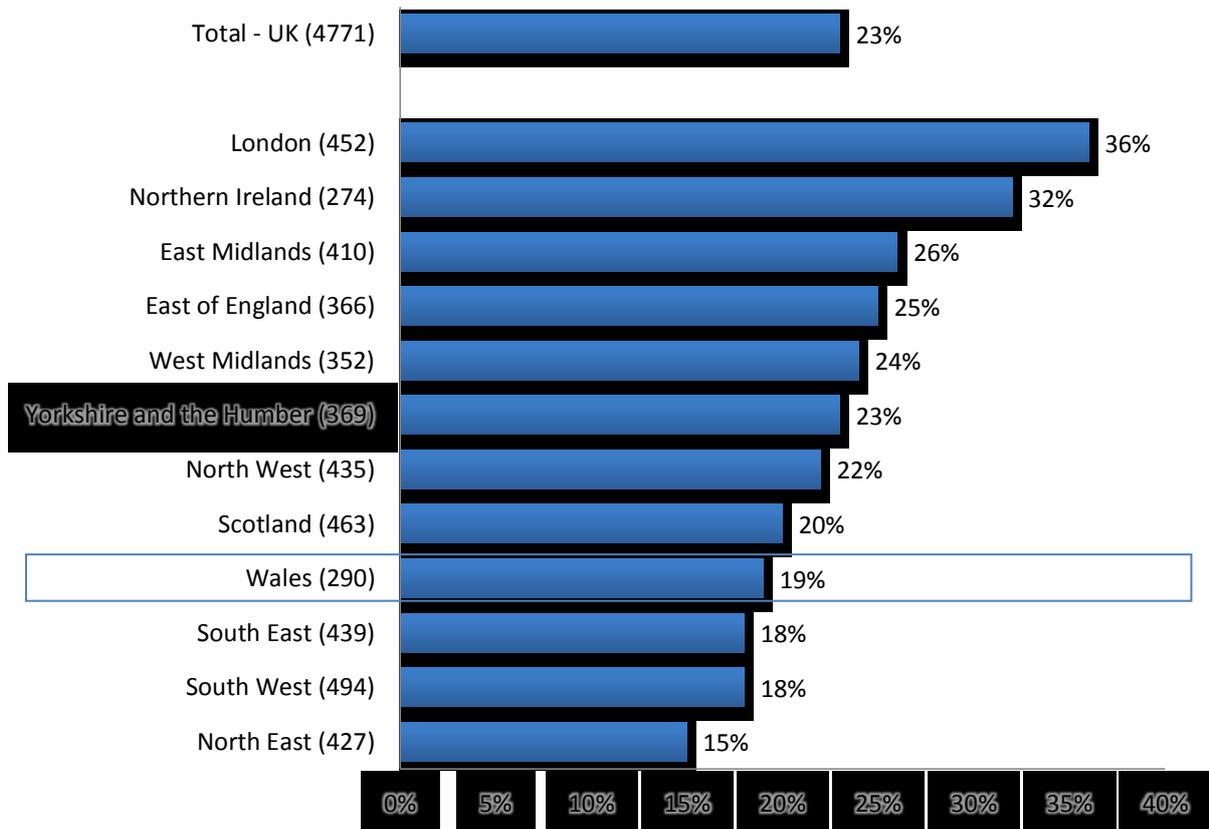


Amongst workers who are employed by an agency the proportion on temporary contracts is significantly higher, as one would expect (78%), than it is amongst those who are self-employed (38%) or employed directly (6%).

Alongside Scotland, Wales is just behind the UK average with regard to the profile of its' construction workforce in terms of employment contracts held, 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 dryliners* (44%) and carpenter/joiners (37%) and lowest amongst electricians* and painters/decorators* (0% in each case). (*Caution: Small sample base.)

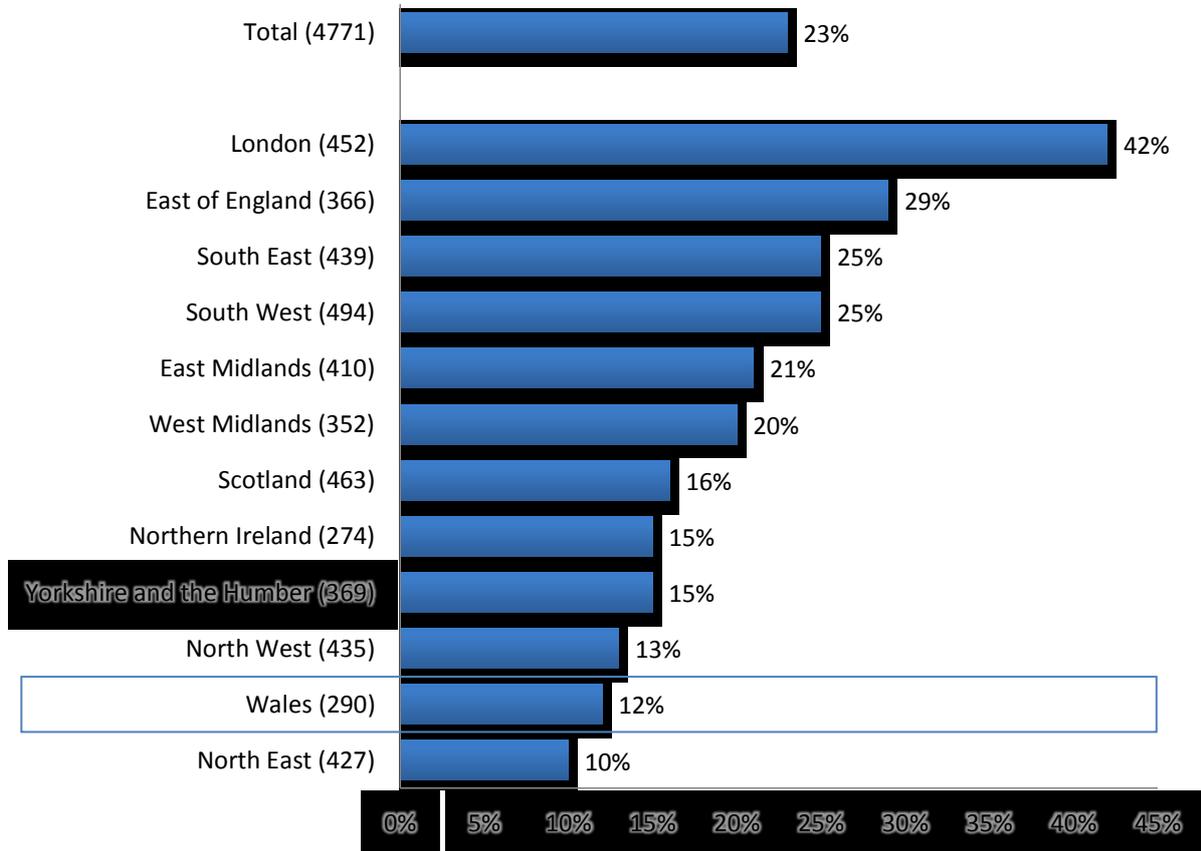
Hours worked

On average construction workers in Wales report that they typically work 43 hours per week, with 80% that tend to work between 40 and 49 hours per week and 12% that work more than 50 hours.

The proportion that works more than 50 hours per week is significantly lower than the UK average amongst construction workers in Wales (12% cf. 23%).



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

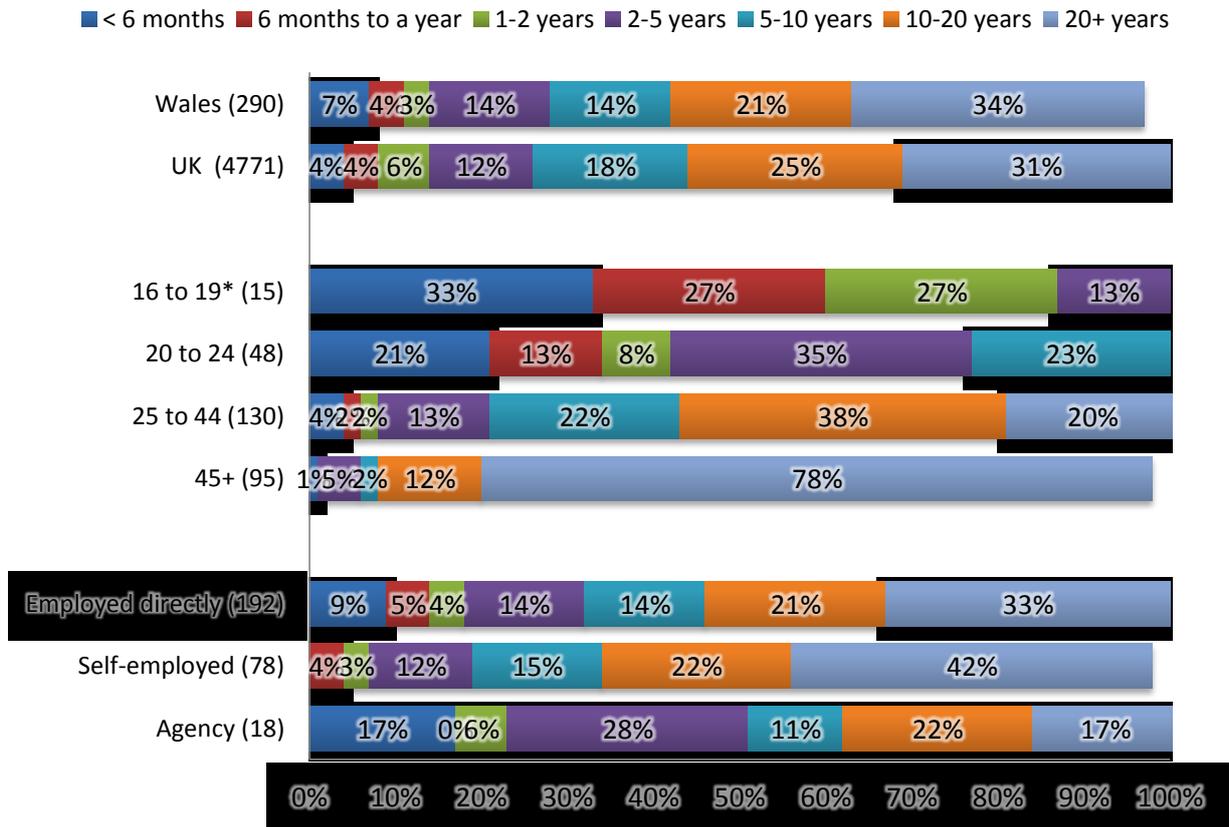
A third of construction workers in Wales have worked in the construction industry for over 20 years (34%) and more than half have worked in the industry for at least 10 years (55%).

Construction workers in Wales are similar to those across the UK in terms of how long they have worked in the industry for.

As one would expect the length of experience in the industry increases with age to almost four fifths of workers aged 45 and over in Wales that have more than 20 years experience of working in the construction sector (78%).



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 a greater proportion of workers in 2015 have worked in the construction sector for less than 5 years; 28% have up to 5 years experience, compared with 19% in 2012.

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

| | WA 2015 | WA 2012 | WA 2007 | UK 2015 |
|--------------------|---------|---------|---------|---------|
| | % | % | % | % |
| Less than 6 months | 7 | 1 | 2 | 4 |
| Up to a year | 11 | 4 | 8 | 8 |
| Up to 2 years | 14 | 8 | 13 | 14 |
| Up to 5 years | 28 | 19 | 32 | 26 |
| Up to 10 years | 42 | 43 | 48 | 44 |
| Up to 20 years | 63 | 66 | 73 | 69 |
| More than 20 years | 34 | 34 | 26 | 31 |
| Unweighted bases | 290 | 428 | 293 | 4771 |



Pre-construction employment histories

Almost two thirds of workers in Wales have only ever worked in the construction industry (63% cf. 70% across the UK and 50% in Wales in 2012). This includes more than half who have worked in construction pretty much continuously (53%); 4% for whom this is their first job; and a further 6% that have only ever worked in the construction sector, but have had spells out of work.

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 (20% 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*

| | WA 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) | 53 | 55 | 53 | 42 | 53 | 59 |
| I have only worked in construction jobs but have had spells of being out of work | 6 | 6 | 0 | 6 | 6 | 5 |
| My first job was in construction but I've also worked in other sorts of jobs in one or more other industries | 14 | 8 | 7 | 17 | 13 | 16 |
| My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs | 21 | 19 | 20 | 25 | 22 | 17 |
| This is my first job. I haven't worked in any other industry. | 4 | 9 | 20 | 6 | 2 | 3 |
| This is my first job in construction but I have worked in other sorts of jobs in one or more other industries | 1 | 3 | 0 | 2 | 2 | 0 |
| Prefer not to say | 1 | 2 | 0 | 2 | 2 | 0 |
| <i>Unweighted bases</i> | <i>290</i> | <i>4771</i> | <i>15*</i> | <i>48</i> | <i>130</i> | <i>95</i> |

Overall 1 in 5 construction workers in Wales say that their first job after full time education was NOT in construction and that they moved into the industry after working in other sorts of jobs/sectors (21% cf. 27% in 2012).

Those who had worked in other sectors before starting their construction careers (22% of all respondents) were asked to give details of what they were doing immediately before they started working in construction. Three in ten had previously worked in the manufacturing sector (30%), while nearly a quarter had worked in the wholesale/retail trade sector (23%). One in nine construction workers who worked in another sector before working in construction previously worked in accommodation and food service activities (11%).



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

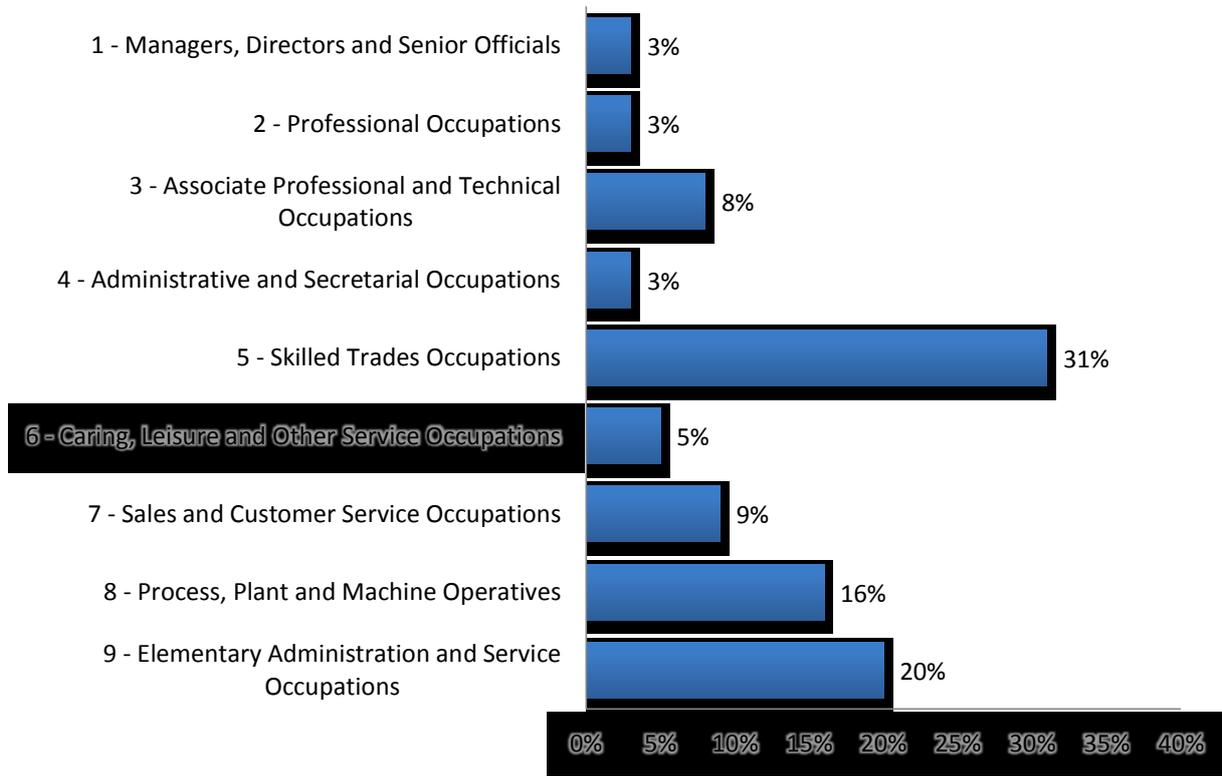
Base: Where first job was not in construction

| | WA 2015 % | UK 2015 % |
|--|---------------------|---------------------|
| C – Manufacturing | 30 | 20 |
| G – Wholesale and retail trade; repair of motor vehicles and motorcycles | 23 | 22 |
| I – Accommodation and food service activities | 11 | 10 |
| A – Agriculture, Forestry and Fishing | 6 | 6 |
| N – Administrative and support service activities | 5 | 6 |
| R – Arts, entertainment and recreation | 3 | 4 |
| B – Mining and quarrying | 3 | 1 |
| H – Transportation and storage | 2 | 10 |
| O – Public administration and defence; compulsory social security | 2 | 6 |
| E – Water supply, sewerage, waste management and remediation activities | 2 | 1 |
| K – Financial and insurance activities | 2 | 1 |
| L – Real estate activities | 2 | 0 |
| M – Professional, scientific and technical activities | 2 | 0 |
| Q – Human health and social work activities | 2 | 0 |
| <i>Unweighted bases</i> | <i>64</i> | <i>983</i> |

In terms of the job roles that respondents in Wales have undertaken in other sectors, the highest proportion has worked in skilled trades occupations (31% cf. 28% in 2012 and 29% across the UK in 2015). One in five has worked in elementary administration and service occupations (20% cf. 31% in 2012 and 21% across the UK in 2015), and 16% as process, plant and machine operatives (cf. 28% in 2012 and 13% across the UK in 2015).



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



Unweighted base = 64

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 just over a third of all construction workers in Wales have worked in more than one construction trade or occupation whilst working in the construction industry (35%). This represents a significant increase compared with 2012 when 23% had worked in more than one role. The proportion in Wales in 2015 is in line with the UK average (34%).

Workers with the highest level of qualifications (Level 4 and above) are more likely to have had more than one role or occupation within the construction sector (62%), as are those in a supervisory or management role on site (51%).

As in 2012, there are also variations by current job role, with site managers (69%) most likely to have had more than one role/occupation within construction, while plasterers* (0%) and plumbers* (5%) are least likely to have had any other trade within the construction sector (*Caution: Small sample base.).

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 | | |
|--|--------------------------|--------------------------|--|--------------------------|--------------------------|
| | WA 2015 % | UK 2015 % | | WA 2015 % | UK 2015 % |
| Site manager (26) | 69 | 69 | Dryliner* (9) | 33 | 38 |
| Banksman /banksperson* (5) | 60 | 46 | Carpenter / Joiner (27) | 26 | 18 |
| Labourer / Gen. Op. (62) | 45 | 33 | Electrician* (9) | 22 | 13 |
| Scaffolder* (8) | 38 | 31 | Bricklayer (39) | 18 | 19 |
| Plant / Mach. Op. (23) | 35 | 55 | Painter / decorator* (8) | 13 | 27 |
| | | | Plumber* (19) | 5 | 13 |
| | | | Plasterer* (1) | 0 | 34 |

Unweighted bases for 2015 Wales 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 (34%) while 1 in 6 workers has previously worked as a bricklayer (17%) and 16% as a plant/machine operative.



Figure 17: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

| Occupation | WA 2015 | UK 2015 |
|---|------------|-------------|
| | % | % |
| Labourer/General operative | 34 | 30 |
| Bricklayer | 17 | 13 |
| Plant/machine operative (e.g. Fork lift/JCB) | 16 | 10 |
| Carpenter/joiner | 13 | 18 |
| Banksman/banksperson | 12 | 7 |
| Painter/decorator | 10 | 8 |
| Pipe fitter | 9 | 5 |
| Roofer | 8 | 9 |
| Dryliner | 8 | 7 |
| Plasterer | 6 | 7 |
| Ground worker | 6 | 5 |
| Technical e.g. surveyor, maintenance technician | 4 | 4 |
| Ceiling fixer | 4 | 4 |
| Steel erector/rigger | 4 | 3 |
| Plumber | 3 | 5 |
| Electrician | 3 | 3 |
| Welder | 3 | 2 |
| Site manager | 2 | 5 |
| Scaffolder | 1 | 4 |
| Floorer | 1 | 3 |
| Glazer/window fitter | 1 | 1 |
| Gardener/landscaper | 1 | 1 |
| Tiler | 1 | 1 |
| Concrete worker | 1 | 1 |
| Fencer | 1 | <0.5 |
| Other | 3 | 6 |
| <i>Unweighted bases</i> | <i>101</i> | <i>1576</i> |

Future career plans

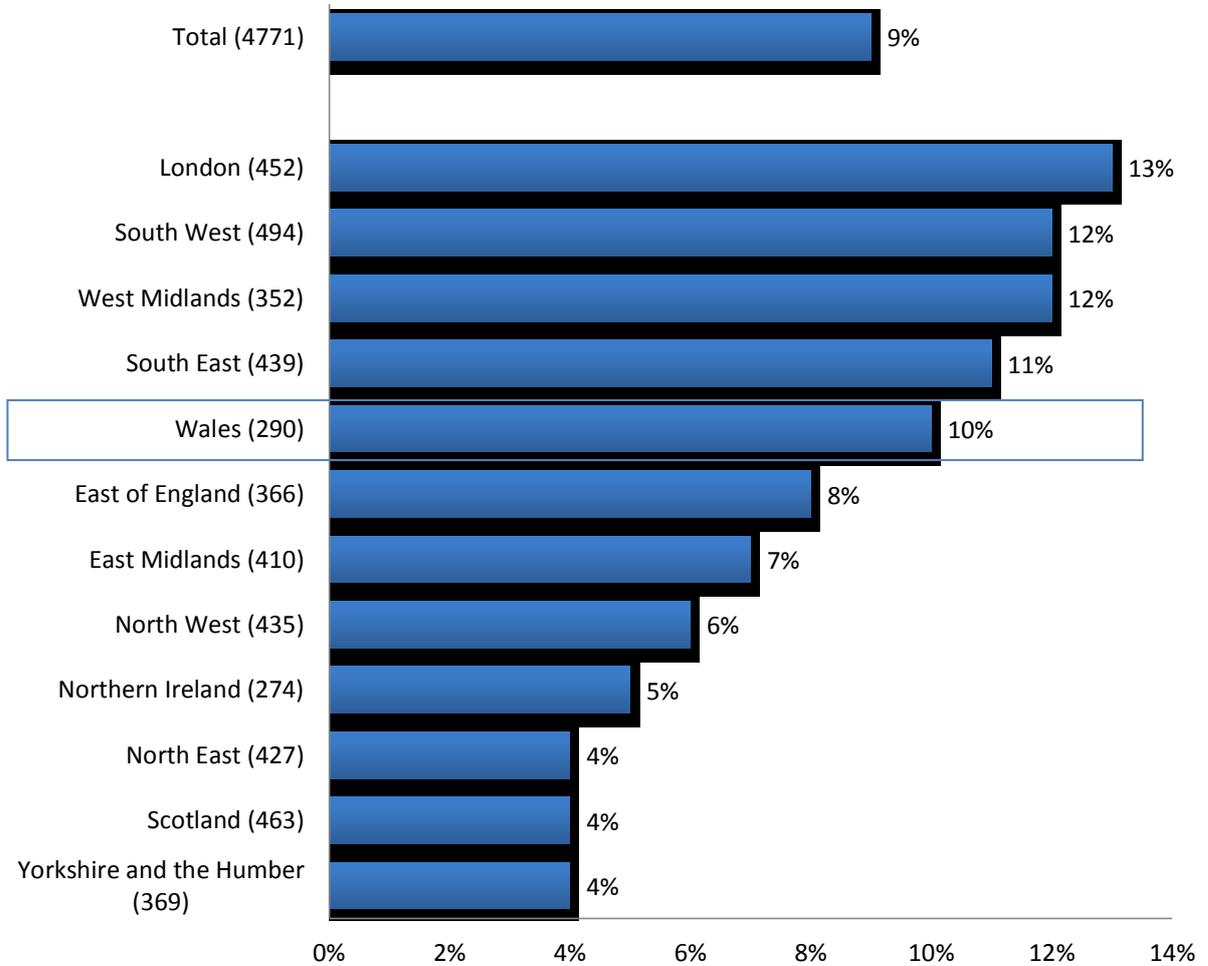
Thinking about their future plans in construction, almost three quarters of construction workers in Wales would like to carry on in the same trade or occupation (73%); 1 in 10 would like to change their trade/occupation (10%); and a further 8% would like to leave construction; the remainder are not sure.

Compared with the UK average, construction workers in Wales are less likely to want to carry on as they are (79% across the UK) and similar proportion want 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 (17%) are more likely than those employed directly (8%) or self-employed (12%) to want to change their trade or occupation; whilst by current trade/occupation those working as a bricklayer or painter/decorator* (both 13%) are most likely to. (*Caution: Small sample base.)

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 (18%).

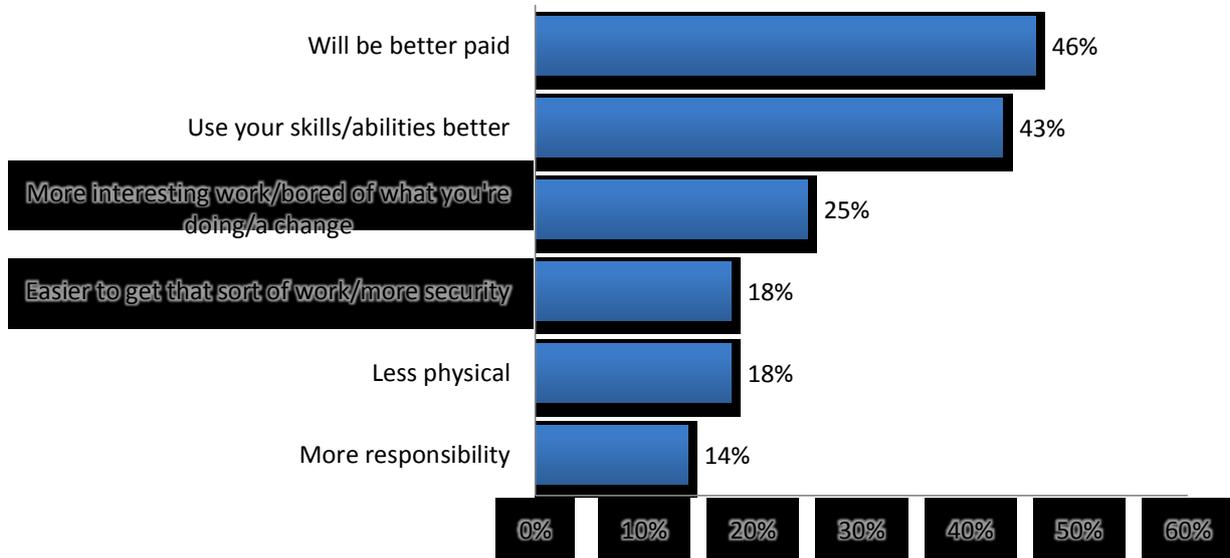
Around 7 in 10 construction workers in Wales that would like to change trade or occupation believe they will require further training or qualifications in order to do this other kind of work (71%). This compares to a higher proportion across the UK (77%).



The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (46%), while 43% believe this kind of work will make better use of their skills or abilities. A quarter believes they would have interesting work or that they are bored with what they are currently doing (25%).

Figure 19: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 28

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) 7% of all construction workers in Wales (2% nationally) say they do not hold any card and 1% are unsure. In total therefore 92% 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 Wales are amongst those in Scotland, Northern Ireland and the East Midlands that are least likely to hold skill certificates or cards (88-93%). There has been no change in this respect in Wales since 2012; although the increase in the proportion of workers in Wales, 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 % |
|--------------------------------|---------------------|---------------------|---------------------|
| UK (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 |

Unweighted bases for 2015 in parentheses

As Figure 21 summarises, in terms of younger workers and those with less experience of the industry, in 2015, a higher proportion of these workers 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

| | | WA 2015 | WA 2012 | WA 2007 | UK 2015 |
|---|------------------------------|---------|---------|---------|---------|
| | | % | % | % | % |
| Total (290) | | 92 | 92 | 82 | 96 |
| Age | 16 to 19 years* (15) | 100 | 65 | 61 | 85 |
| | 20 to 24 years (48) | 87 | 85 | 79 | 95 |
| | 25 to 44 years (130) | 96 | 98 | 83 | 97 |
| | 45+ years (95) | 87 | 91 | 92 | 95 |
| Length of time in construction | <1 year in construction (33) | 91 | 60 | 44 | 88 |
| | 1 to 2 years* (10) | 100 | 79 | 67 | 96 |
| | 3 to 4 years (41) | 85 | 83 | 85 | 96 |
| | 5+ years (203) | 94 | 95 | 87 | 96 |
| Contract-type | Employed directly (192) | 93 | 89 | 86 | 95 |
| | Self- employed (78) | 87 | 97 | 74 | 97 |
| | Agency (18) | 94 | 0 | 71 | 95 |
| <i>Unweighted bases for 2015 Wales in parentheses</i> | | | | | |

In terms of the type of skill card or certificate held by construction workers in Wales the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (83%), as it was in 2012 (87%). Overall 18% hold the CPCS (Construction Plant Competence Scheme) card/certificate and this proportion increases to 27% amongst workers aged 45+.

Figure 22: Type of skill card/certificate held

Base: All respondents

| | WA 2015 | WA 2012 | UK 2015 |
|---|------------|------------|-------------|
| | % | % | % |
| CSCS (Construction Skills Certification Scheme) (GB) | 83 | 87 | 86 |
| CSR (Construction Skills Register) (NI) | 1 | | 3 |
| CISRS (Construction Industry Scaffolders Record Scheme) | 2 | <0.5 | 4 |
| CPCS (Construction Plant Competence Scheme) | 18 | 10 | 13 |
| Other | 3 | 6 | 4 |
| <i>Unweighted bases</i> | <i>290</i> | <i>428</i> | <i>4771</i> |

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

- Banksmen* (60%) and plant/machine operatives (52%) are more likely to hold CPCS (Construction Plant Competence Scheme) (*Caution: Small sample base.);
- Half of scaffolders* (50%) hold CISRS (Construction Industry Scaffolders Record Scheme) (*Caution: Small sample base.);
- Bricklayers (97%) and plumbers (95%) are most likely to hold CSCS (Construction Skills Certification Scheme (GB));



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 Wales, 10% of CSCS card holders have red cards; just over two thirds of CSCS (35%) card holders have green cards; and just over a quarter of CSCS card holders (28%) and one of the three CSR card holders in Wales have blue cards. Fewer CSCS card holders have gold cards (12%).

Figure 23: Colour of CSCS/CSR cards held

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

| | CSCS % | | CSR* % |
|---|------------------|---|------------------|
| Red - Trainee | 8 | Red - Apprenticeship/Trainee | 0 |
| Red - Experienced worker card | 2 | Red - Trained Plant Operator | 0 |
| Green - construction site operative card for general site workers | 35 | Green - Construction Operative (for general site workers) | 0 |
| Blue - skilled | 28 | Blue - Operative/ Craft | 33 |
| | | Blue - Plant Operator | 0 |
| | | Blue - Basic Scaffolder | 0 |
| Gold - craft/supervisor card | 12 | Gold - Craft/Supervisor Card | 0 |
| | | Gold - Advanced Scaffolder | 0 |
| Platinum - manager card | 1 | Platinum - Manager Card | 0 |
| Black - contracts manager card | 4 | Black - Senior Managers Card | 0 |
| Other | 3 | Other Professional cards, visitor cards, temporary cards | 33 |
| Unsure | 8 | Unsure | 33 |
| <i>Unweighted bases</i> | <i>240</i> | | <i>3</i> |

As expected, younger workers are more likely to hold Red Trainee cards (47% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue cards (40% of 45+ year olds).

Card colours also vary significantly according to current occupation/trade, as Figure 24 summarises. Banksmen* (75%) and plant/machine operatives* (73%) are most likely to hold Blue cards, while electricians* (50%) and carpenters/joiners* (39%) are most likely to hold Gold cards. (*Caution: Small sample base.)



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. | 49 | 10 | 0 | 55 | 20 | 2 | 0 | 0 |
| Plant / Mach. Op.* | 15 | 7 | 0 | 7 | 73 | 0 | 0 | 0 |
| Carpenter / Joiner* | 18 | 11 | 6 | 17 | 17 | 39 | 0 | 0 |
| Bricklayer | 38 | 13 | 0 | 39 | 32 | 13 | 0 | 0 |
| Dryliner* | 8 | 0 | 0 | 75 | 25 | 0 | 0 | 0 |
| Banksman / Banksperson* | 4 | 0 | 25 | 0 | 75 | 0 | 0 | 0 |
| Electrician* | 6 | 0 | 17 | 17 | 0 | 50 | 0 | 0 |
| Painter / decorator* | 7 | 0 | 0 | 57 | 43 | 0 | 0 | 0 |
| Plasterer* | 1 | 0 | 0 | 100 | 0 | 0 | 0 | 0 |
| Plumber * | 18 | 0 | 0 | 11 | 50 | 17 | 0 | 0 |
| Scaffolder* | 5 | 0 | 0 | 40 | 0 | 20 | 0 | 0 |
| Site manager | 23 | 13 | 0 | 4 | 9 | 30 | 4 | 39 |

Construction qualifications held

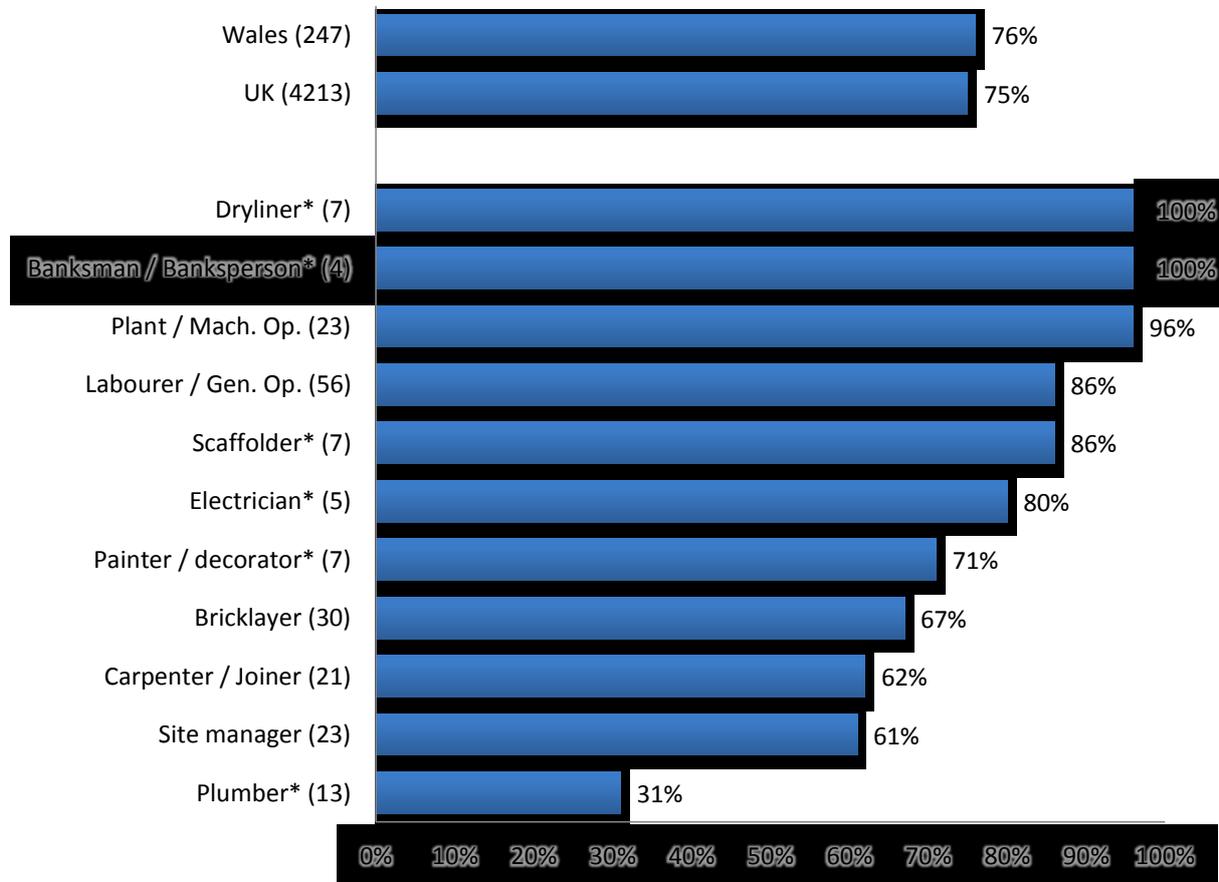
All workers were asked about the construction-specific qualifications they held after leaving full time education and started their first proper job in construction.

Overall three quarters of all construction workers in Wales say they had no formal qualifications related to construction when they first started working in the construction industry (76%) and the proportion is higher amongst the youngest and oldest workers (83% of both 16 to 19 year olds and 45+ year olds). By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst dryliners* and banksmen* (all of the small sample in these occupations) and plant/machine operatives (96%), whilst plumbers* (31%) 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, nearly three fifths of construction workers in Wales reported holding some sort of construction related qualification at the time of interview (58%), compared with a larger proportion in 2012 (70%). Compared with the UK average, construction workers in Wales are less likely to hold some sort of construction related qualification (63% in 2015; 65% in 2012).

As Figure 26 summarises the proportion of workers that hold any qualifications is lower than average amongst construction workers aged 45+ (45%).



Figure 26: Proportion of workers that hold any construction-specific qualification
 Base: All respondents who provided a valid response *caution: small sample base

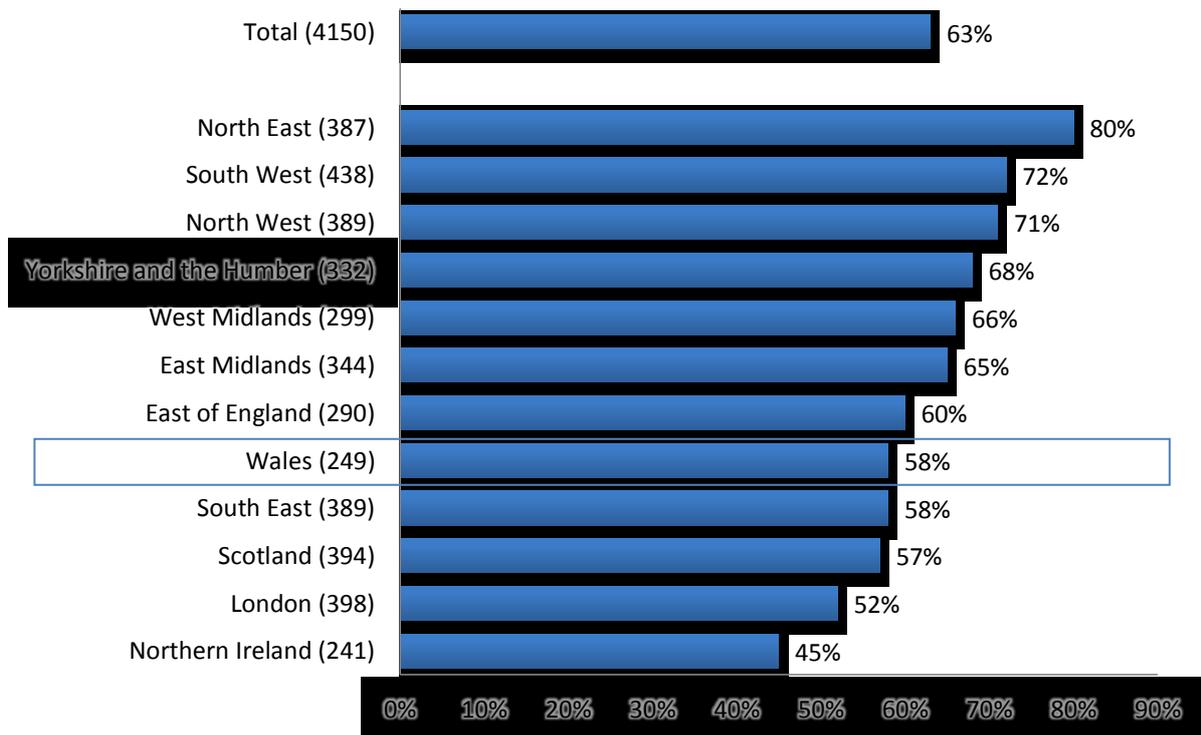
| | | WA 2015 | WA 2012 | WA 2007 | UK 2015 |
|--------------------------------|-------------------------|---------|---------|---------|---------|
| | | % | % | % | % |
| Wales (249) | | 58 | 70 | 63 | 63 |
| Age | 16 to 19 years* (15) | 73 | 44 | 39 | 62 |
| | 20 to 24 years (46) | 63 | 70 | 55 | 62 |
| | 25 to 44 years (111) | 62 | 73 | 68 | 65 |
| | 45+ years (75) | 45 | 68 | 68 | 61 |
| Length of time in construction | <1 year (33) | 55 | 22 | 38 | 35 |
| | 1 to 2 years* (10) | 90 | 40 | 40 | 50 |
| | 3 to 4 years (38) | 47 | 72 | 45 | 54 |
| | 5+ years (166) | 60 | 74 | 69 | 68 |
| Current contract type | Employed directly (166) | 55 | 68 | 63 | 65 |
| | Self-employed (67) | 63 | 73 | 68 | 61 |
| | Agency* (14) | 79 | 0 | 23 | 46 |

Unweighted bases for 2015 Wales in parentheses

The propensity of Wales' construction workforce 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





The likelihood that workers hold any qualifications also varies significantly by current job role, as was the case in 2012. Plumbers* (100%) and site managers (87%) are most likely to hold qualifications, whilst trades less likely to hold formal qualifications include those working as a banksmen* (33%), labourers/general operatives (38%) and plant/machine operatives (39%). (*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 (63%), which is a similar proportion to that reported in 2012 in Wales (67%) and the UK 2015 average (66%). Around 1 in 5 construction workers in Wales with qualifications hold City & Guilds qualifications (21%), again similar to 2012 (23%) and the UK 2015 average (20%). As has been the case previously, significantly fewer construction workers in Wales hold an apprenticeship (2%) compared to the UK average (13%).

Figure 28: Main type of qualification held

Base: Workers with qualifications who provided a valid response

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % |
|-------------------------|--------------|--------------|--------------|--------------|
| NVQ/SVQ | 63 | 67 | 44 | 66 |
| City & Guilds | 21 | 23 | 30 | 20 |
| Apprenticeship | 2 | 0 | 3 | 13 |
| HNC/HND/BTEC Higher | 6 | 1 | 5 | 4 |
| Degree | 7 | <0.5 | 7 | 4 |
| Other | 9 | 5 | N/A | 11 |
| <i>Unweighted bases</i> | <i>131</i> | <i>226</i> | <i>174</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 18% of construction workers in Wales believe they would benefit from some form of training in basic skills, compared with 15% in 2012. In terms of the type of training required, 13% believe they would benefit from training in maths, 8% in reading, 6% in writing and 3% in speaking English, as Figure 29 summarises.



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

Base: All respondents

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % |
|-------------------------|---------------------|---------------------|---------------------|---------------------|
| ANY | 18 | 15 | 11 | 14 |
| Maths | 13 | 10 | 6 | 6 |
| Reading | 8 | 6 | 7 | 6 |
| Writing | 6 | 4 | 7 | 6 |
| Speaking English | 3 | 3 | 4 | 7 |
| <i>Unweighted bases</i> | <i>290</i> | <i>428</i> | <i>293</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:

- Younger workers aged 16-19 (33% cf. 14% aged 45+);
- Those who have worked in the industry for 1 to 2 years (40%) or less than a year (27%);
- Banksmen* (40%), electricians* (33%), bricklayers (31%) and labourers/general operatives (26%). (*Caution: Small sample base.)

The proportion that identified a need for more training in basic skills is higher in Wales than the UK average (14%).

Current study for additional construction qualifications

Overall 12% of all construction workers in Wales are currently working towards any formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 13% 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 (60% of 16 to 19 year olds) and amongst those who have worked within the construction industry for less than two years. Workers employed directly (15%) are also more likely than those who are self employed (8%) or working through an agency (6%) to be currently working towards a qualification.

Of those who have no qualifications currently 11% are working towards one.

Figure 30 summarises these findings.



Figure 30: Proportion working towards additional construction qualifications

Base: All respondents

*caution: small sample base

| | | WA 2015 | WA 2012 | WA 2007 | UK 2015 |
|--------------------------------|------------------------------|---------|---------|---------|---------|
| | | % | % | % | % |
| Total (290) | | 12 | 13 | 19 | 12 |
| Age | 16 to 19 years* (15) | 60 | 65 | 57 | 57 |
| | 20 to 24 years (48) | 23 | 25 | 35 | 23 |
| | 25 to 44 years (130) | 11 | 13 | 12 | 10 |
| | 45+ years (95) | 2 | | | 4 |
| Length of time in construction | <1 year in construction (33) | 30 | 60 | 44 | 31 |
| | 1 to 2 years*(10) | 50 | 47 | 47 | 28 |
| | 3 to 4 years (41) | 20 | 38 | 48 | 23 |
| | 5+ years (203) | 6 | 7 | 10 | 7 |
| Contract type | Employed directly (192) | 15 | N/A | N/A | 16 |
| | Self-employed (78) | 8 | N/A | N/A | 8 |
| | Agency (18) | 6 | N/A | N/A | 10 |
| Highest qualification level | None (104) | 11 | N/A | N/A | 11 |
| | Level 1* (13) | 38 | N/A | N/A | 32 |
| | Level 2 (66) | 20 | N/A | N/A | 15 |
| | Level 3 (45) | 7 | N/A | N/A | 8 |
| | Level 4+ (21) | 5 | N/A | N/A | 15 |

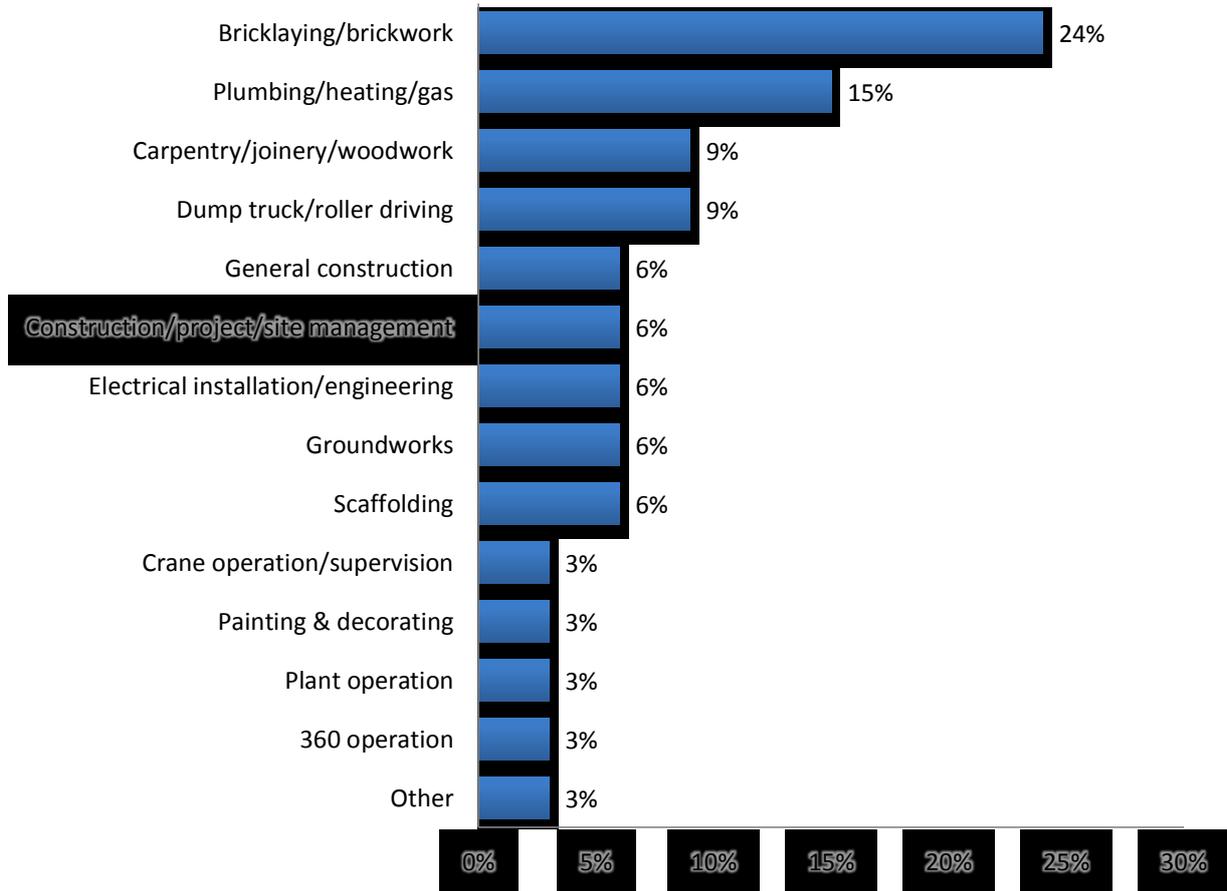
Unweighted bases for 2015 Wales in parentheses

Of those who are currently studying for a qualification the most popular type of qualification is an NVQ/SVQ (94%). In terms of the subject of the qualifications being worked towards bricklaying (24%), followed by plumbing/heating/gas (15%) 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 = 36

With regard to the level of qualification being worked towards (see Figure 32), qualifications equivalent to Level 3 (56%) are the most common, followed by Level 2 (19%).

Figure 32: Level of qualification being worked towards

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

| | WA 2015 % | UK 2015 % |
|------------------|--------------|--------------|
| Level 1 | 0 | 6 |
| Level 2 | 19 | 31 |
| Level 3 | 56 | 35 |
| Level 4+ | 4 | 11 |
| Other | 11 | 9 |
| None | 11 | 7 |
| Unweighted bases | 27 | 469 |



Supervisory and managerial qualifications and training

As reported earlier, just over a fifth of all construction workers in Wales perform a supervisory or management role at their site (22%). 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 3% want to be a supervisor/manager and have done it before. Just over a fifth of all workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (21%), while more than half are certain that they do not want to be (55%).

Amongst the youngest workers, aged 16 to 19, the proportion that would like to be supervisors/managers is highest, at 40%, while amongst those aged 45 and over a significantly higher proportion of workers definitely do not want to be supervisors/managers (80%). 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 65% 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 (50%) are more likely than those employed directly (22%) or self-employed (8%) 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 % |
|--------------------------------|-------------------|------------------|------------------------------------|-------------------------------|------|-----------------|
| Wales | | 215 | 20 | 3 | 55 | 21 |
| UK | | 3457 | 20 | 6 | 53 | 21 |
| Age | 16 to 19 years* | 15 | 33 | 7 | 20 | 40 |
| | 20 to 24 years | 41 | 27 | 2 | 34 | 37 |
| | 25 to 44 years | 87 | 28 | 2 | 53 | 17 |
| | 45+ years | 70 | 4 | 3 | 80 | 13 |
| Length of time in construction | <1 year | 30 | 20 | 3 | 37 | 40 |
| | 1 to 2 years* | 8 | 25 | 0 | 13 | 63 |
| | 3 to 4 years | 35 | 37 | 0 | 40 | 23 |
| | 5+ years | 139 | 16 | 4 | 65 | 14 |
| Contract type | Employed directly | 135 | 22 | 2 | 51 | 24 |
| | Self-employed | 62 | 8 | 5 | 74 | 13 |
| | Agency | 16 | 50 | 6 | 19 | 25 |
| Highest qualification level | No Qualifications | 93 | 22 | 1 | 57 | 20 |
| | Level 1* | 9 | 22 | 0 | 33 | 44 |
| | Level 2 | 53 | 23 | 2 | 55 | 21 |
| | Level 3 | 29 | 21 | 10 | 48 | 21 |
| | Level 4+* | 1 | 0 | 0 | 100 | 0 |

More than a quarter of all construction workers in Wales (28%; 25% across the UK) and more than four fifths of those who have had some form of supervisory or management responsibilities (84% cf. 50% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.

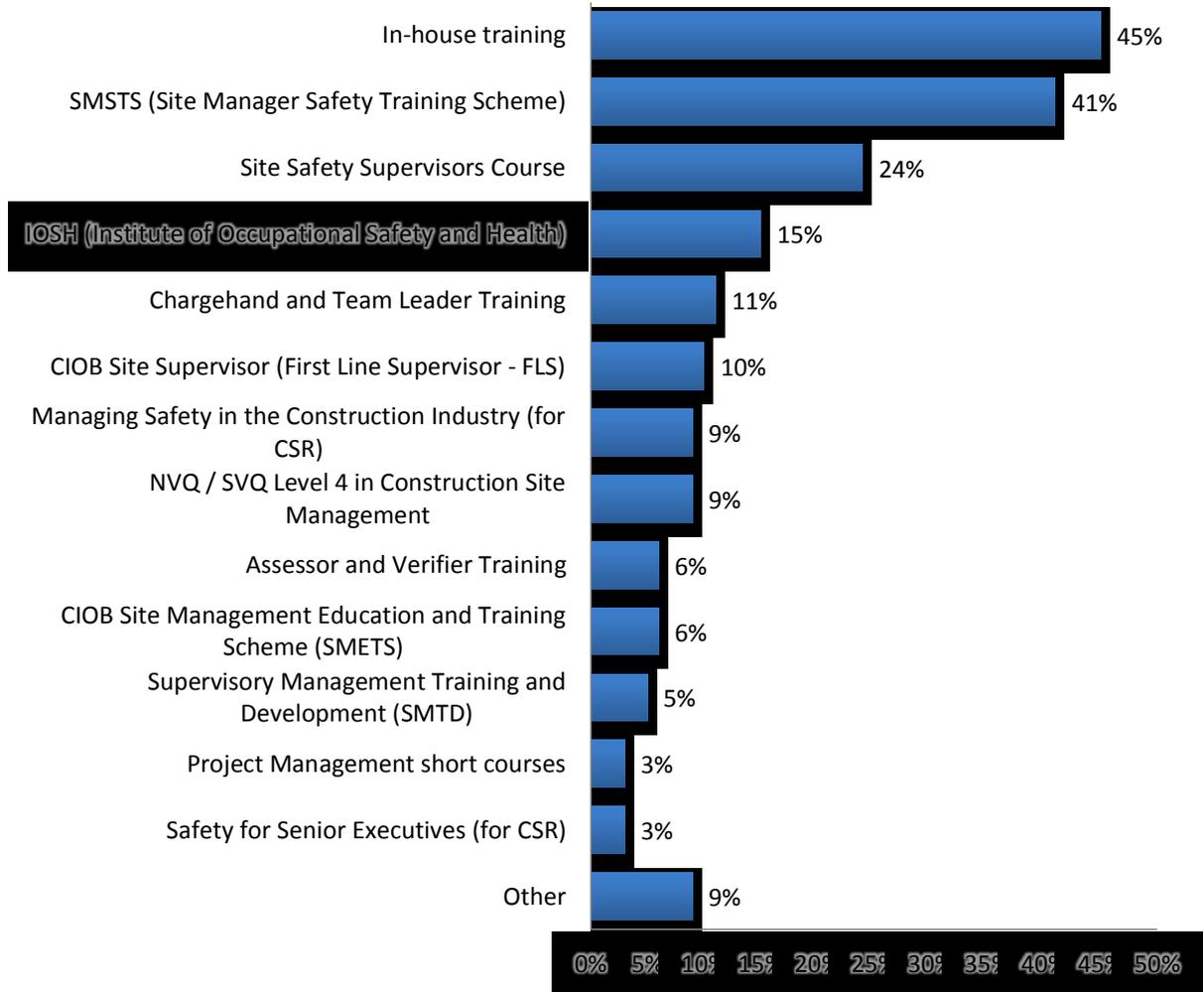
The proportion that has undertaken any managerial or supervisory training is highest amongst workers aged 25 to 44 (37%), those that have worked in construction for 5+ years (33%) and those employed directly (31%). Virtually all site managers have received formal training designed to improve managerial or supervisory knowledge or skills (96%).

In terms of the types of supervisory/managerial training undertaken the proportions mentioning each type are summarised in Figure 34. In-house training is most frequently mentioned by those who have undertaken any training (45%), followed by SMSTS (41%) and Site Safety Supervisors Courses (24%).



Figure 34: Types of managerial/supervisory training undertaken

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



Unweighted base = 80

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 Wales (96%) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): 4% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

A third of the workforce (32%) holds a skill card/certificate, but have no other construction qualification, this is lower than in 2012 (42%); however is more consistent with findings from 2007 (30%).



Figure 35: Qualification status summary

Base: All respondents

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| Holds a formal construction qualification or a skills card/certificate or working towards a qualification | 96 | 95 | 94 | 98 |
| Holds a formal construction qualification or a skills card/certificate | 96 | 95 | 90 | 97 |
| Holds a skills card/certificate | 92 | 92 | 82 | 96 |
| Holds a skills card/certification but no other qualification | 32 | 42 | 30 | 30 |
| Working towards a qualification | 12 | 13 | 19 | 12 |
| <i>Unweighted bases</i> | <i>290</i> | <i>428</i> | <i>293</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.

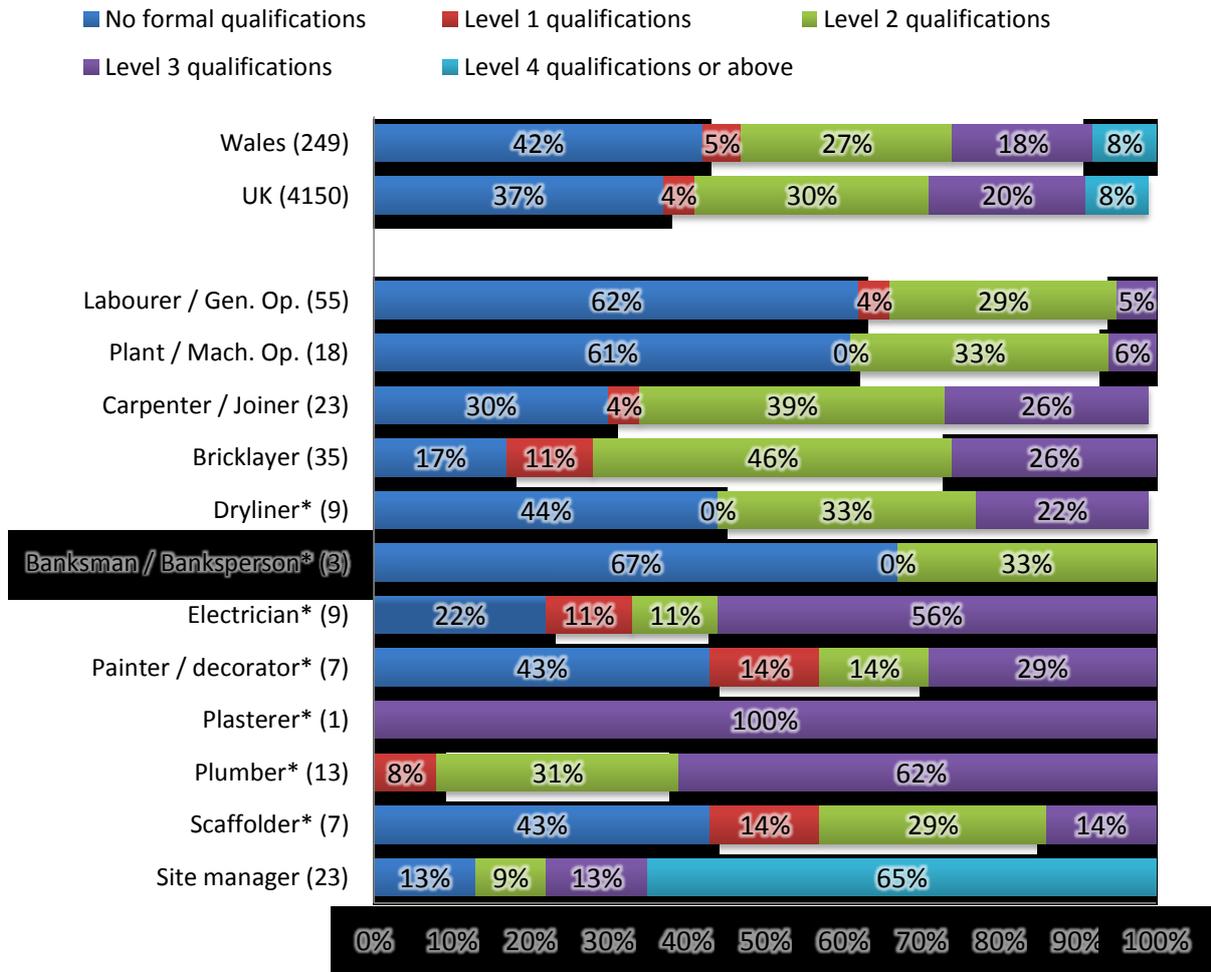
Overall while more than two fifths of construction workers in Wales (42% cf. 30% in 2012 and a 2015 UK average of 37%) have no qualifications, more than half have qualifications equivalent to Level 2 or above (53% cf. 58% across the UK in 2015).

By occupation site managers are most likely to hold the highest level of qualifications; almost two thirds hold qualifications at Level 4 or above (65%) and a further 13% have Level 3 qualifications. Plumbers* and electricians* are also more likely than other occupations to hold qualifications equivalent to Level 3 or above (62% and 56% respectively). (*Caution: Small sample base.)



Figure 36: Current qualification level, by occupation

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

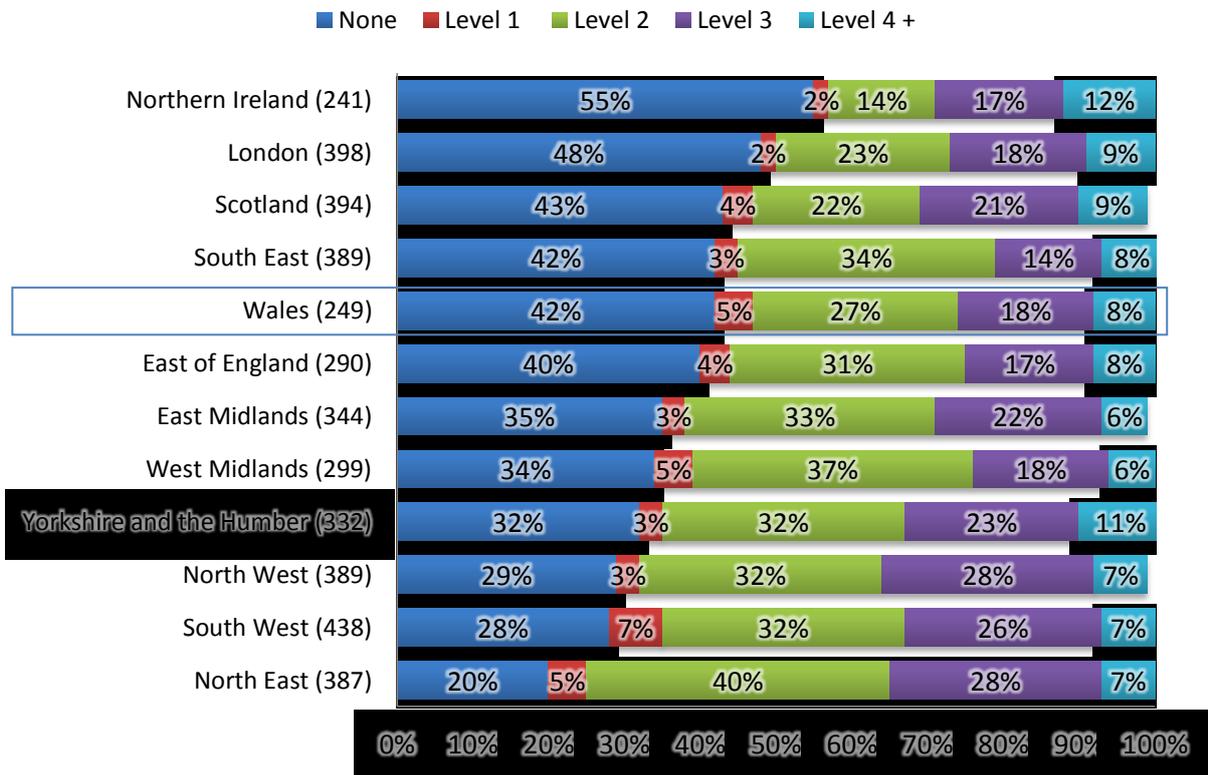


Unweighted bases in parentheses

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 Wales falls in the mid range in terms of qualifications held.



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



Unweighted bases in parentheses

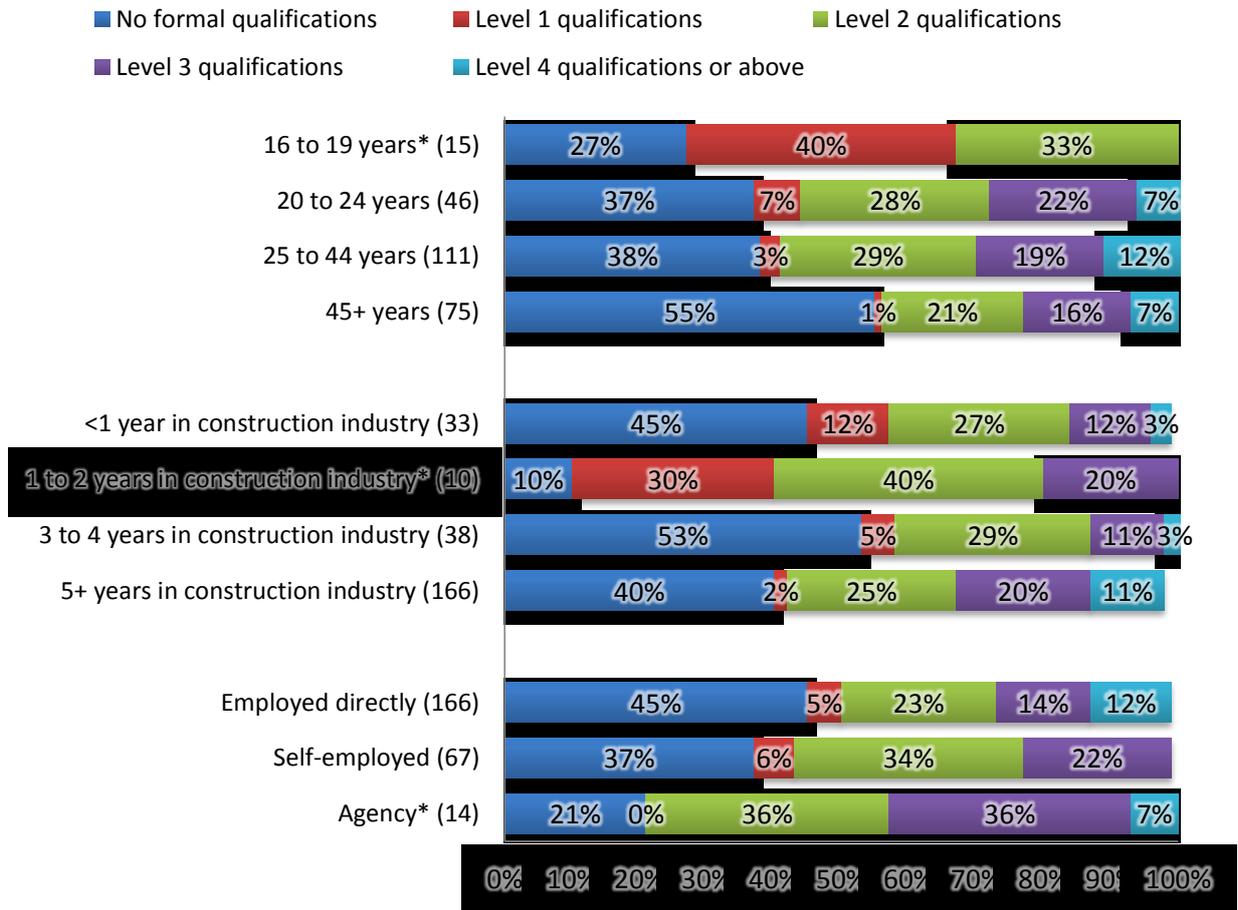
Looking at other sub-groups of construction workers, younger workers are most likely to have Level 1 or 2 qualifications (73% of 16-19 year olds, compared to 22% of those aged 45+). A similar pattern is evident in terms of length of time in the construction industry, with those having worked in construction for 5+ years more likely than those having spent less time in the industry having qualifications at Level 3 or 4+ (31%, compared with 15% that have less than a years' experience).

In terms of contract type, workers who are currently working for an agency are less likely than those employed directly or self employed to have no qualifications (21% cf. 45% and 37%, respectively). In addition, agency workers are more likely to have Level 3 or 4+ qualifications (43%), compared with workers who are self-employed (22%) or employed directly (26%). 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 Wales the most likely reason for working there is because they grew up there/have always lived there (63%), with a further 7% mentioning other reasons to do with their family. Overall family reasons are mentioned to a greater degree than in 2012 (70% cf. 61%).

The next most likely reason for working at their current location is that their employer sent them there (29% cf. 30% in 2012).

Figure 39: Reasons for choosing to work in current location

Base: All respondents

| | WA 2015 % | UK 2015 % | | WA 2012 % |
|---|--------------------------|--------------------------|----------------------------|--------------------------|
| You grew up here/have always lived here | 63 | 55 | Family | 61 |
| Family reasons | 7 | 6 | | |
| Employer sent you here | 29 | 36 | Employer sent me | 30 |
| Came to the area to take up this or another job | 2 | 5 | More regular opportunities | 5 |
| There are more jobs available in this area | 2 | 6 | More jobs here | 6 |
| Construction work is better paid in this area | 1 | 3 | Better paid jobs | 2 |
| Wanted to move to the area because you like it or feel it offers opportunities for better quality of life | <0.5 | 1 | Prefer living here | 5 |
| <i>Unweighted bases</i> | <i>290</i> | <i>4771</i> | | <i>428</i> |

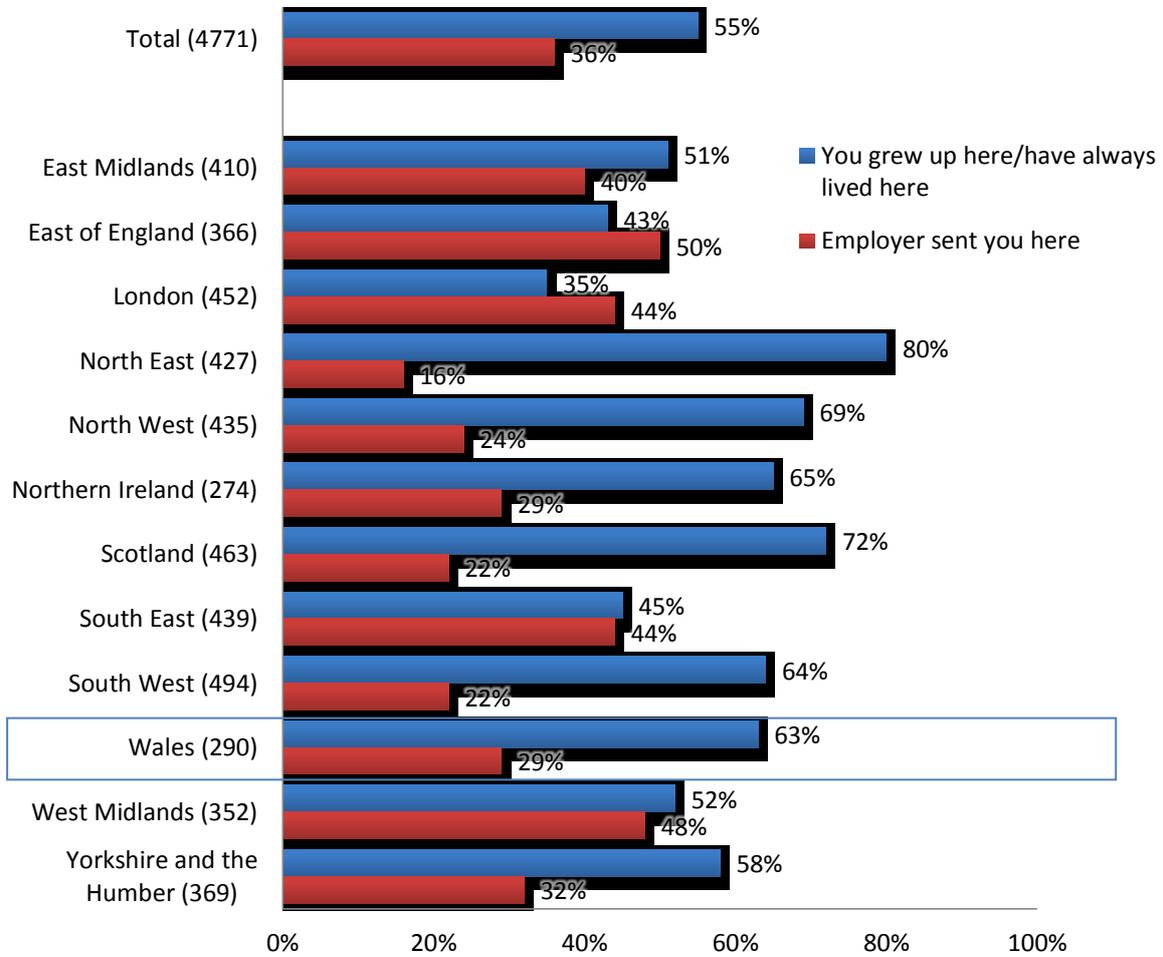
Younger workers aged 16-19 (40%) are more likely than older workers to say that they work in their current location because their employer sent them.

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 Wales are more likely than the UK average to cite having always lived there and less 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 base = 435

Half of all workers have worked within Wales for their entire construction career (51%), compared with a lower proportion in 2012 (40%) and 2007 (39%). A further 34% have remained in Wales most of the time.



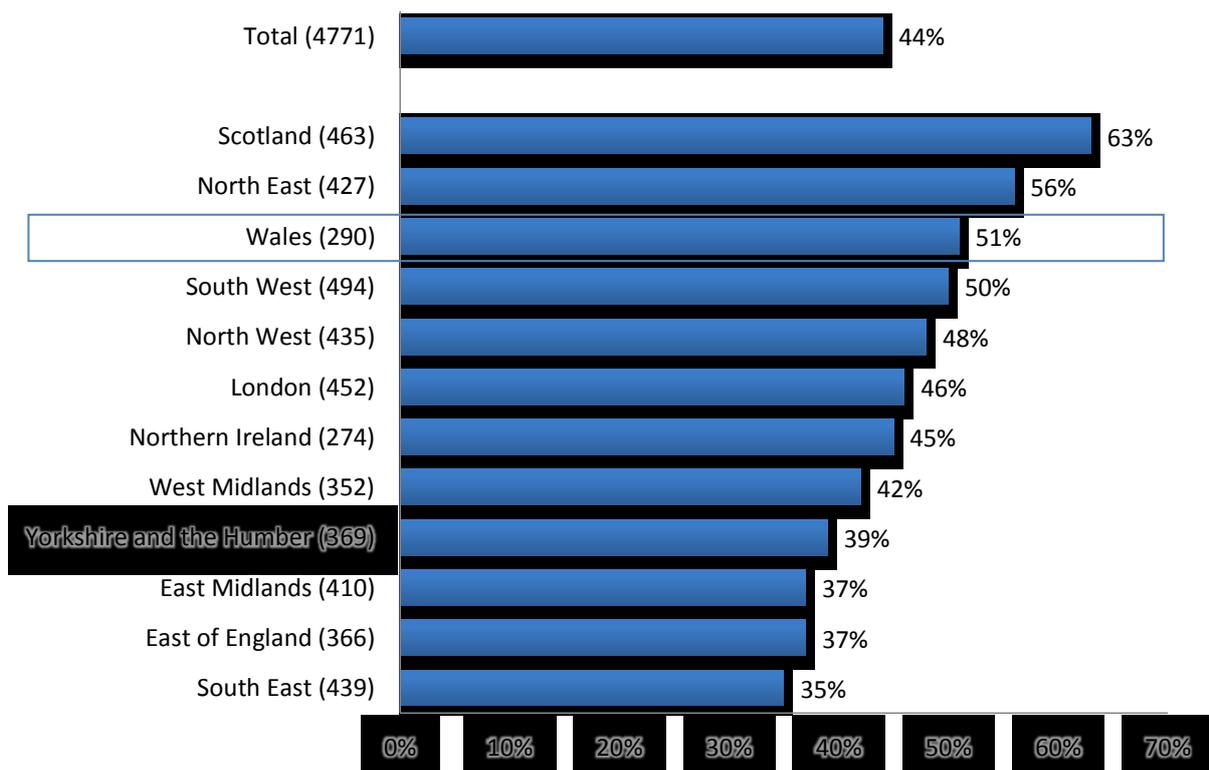
Figure 41: Proportion of construction workers' career worked in current region/nation
 Base: All respondents

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % |
|--|--------------|--------------|--------------|--------------|
| All of your time | 51 | 40 | 39 | 44 |
| Most of it | 34 | 37 | 37 | 36 |
| Around half your time | 7 | 10 | 12 | 8 |
| A small proportion of your time | 6 | 11 | 9 | 7 |
| Only on this job (this is the first site you've been to in this region/nation) | 1 | 2 | 1 | 3 |
| Don't know | 1 | <0.5 | 2 | 2 |
| <i>Unweighted bases</i> | 290 | 428 | 293 | 4771 |

The proportion of construction workers in Wales that have spent all of their time there is higher amongst workers employed directly by a company (55%) compared to those that are self-employed (42%) or working through an agency (39%). There are quite significant variations again by region/nation; Wales has a higher proportion of workers that have spent all their time there compared to the UK average.

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 96% in Wales.

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 |
| Unweighted bases | 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. Overall, 83% of construction workers in Wales state that their last site was in Wales, a similar proportion to Yorkshire and the Humber (82%).



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 9 in 10 construction workers in Wales were living in Wales when they started their construction career (94%). There are considerable variations in the extent to which workers have remained in their original locality. As Figure 45 summarises workers currently based in Wales are amongst the most 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 Wales are fifth least 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% |
| <i>Unweighted bases for 2015 in parentheses</i> | | | |

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.

Overall 7% of construction workers in Wales are travelling into the nation for work from another region/nation in which their current residence is based, slightly fewer than in 2012 (9%).



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.

After those in Northern Ireland (99%), the North East (97%) and Scotland (96%) construction workers in Wales are the most likely to be both living and working in Wales (93%).



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 |
| Unweighted bases | 275 | 235 | 284 | 314 | 340 | 155 | 314 | 306 | 364 | 206 | 216 | 291 |

Furthest distance worked in last 12 months

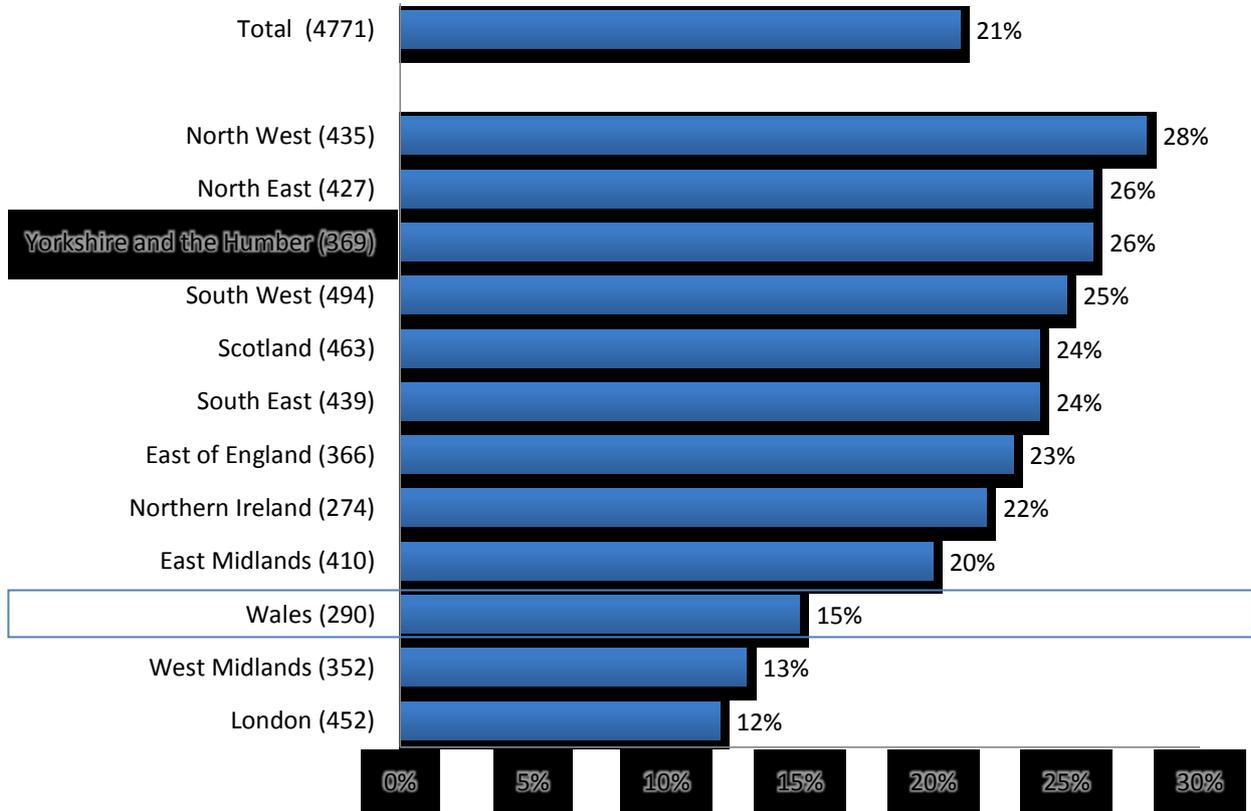
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within Wales, 18% of construction workers have worked no more than 20 miles away and a further two fifths have worked between 21 and 50 miles away (40%). This leaves two fifths that have worked more than 50 miles away from their permanent home (42%), which includes 27% that have worked between 51 and 100 miles away and 15% that have worked more than 100 miles away.

Once again there are variations in this regard, with workers based in Wales (15%) amongst those least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months.



Figure 49: 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 in Wales (4%) is broadly in line with the UK average, on a par with the North East and Yorkshire and the Humber (both 4%) but higher than in 2012 (1%).



Figure 50: Percentage of workers in temporary accommodation
 Base: All respondents

| | UK 2015 % | UK 2012 % |
|---|---------------------|---------------------|
| UK (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 Wales, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 16 miles which is less than the average of 26 miles reported in 2012. The mean in Wales compares to a mean of 22 miles across the UK.

Two fifths (39%) travelled less than 10 miles from their current residence to the site they work, whilst a further two fifths (39%) travelled between 10 and 19 miles, 18% travelled between 20 and 49 miles and 3% travelled between 50 and 99 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (19% of all construction workers in Wales) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 11% expect to work for another week or so, or less; 7% expect another month; 7% about 3 months; 30% between 6 months and a year and 9% expect to still be working for their current company/agency in more than a year's time. More than a third of all temporary workers in Wales did not know how much longer they could expect to be working for their current company/agency (36%).

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 Wales (21% cf. 13% in 2012) do not expect to work on that site for more than a month, including 4% that only expect to be there for about a week or less. More than a fifth anticipated being on site for more than a month, but less than a year (21%), compared with a significantly higher proportion in 2012 (29%). Nearly two fifths expect to stay on that site for a year or longer (38%), which is a significant increase compared with 2012 (26%), suggesting more stable employment than in 2012. However in a further one fifth of cases (20% cf. 32% 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.

The youngest workers, aged 16-19 are most likely to be unsure of how much longer they can expect to work for (47% don't know).

Amongst the various trades/job roles, site managers are more likely to indicate that they expect to work at that site for more than a year (58%); dryliners* (11%) and carpenters/joiners (19%) are least likely to indicate that this is the case. (*Caution: Small sample base.)

Expected next site location

Around 7 in 10 construction workers in Wales are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis (71% cf. 74% in 2012). The remaining third of workers are sure that this will not be the case (6%); that it depends where the work is (19%); or that they don't know (5%).

Construction workers who have worked in construction for the longest period of time are more likely to be confident of this (75% of those who have worked in the industry for 5+ years, cf. 45% of those who have worked in construction for under a year).

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. Of the workers in Wales that do not expect to be able to commute daily to their next job, 69% expect to remain there for their next job, placing them on a par with workers from Northern Ireland in this respect.



Figure 51: 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 worked on several types of projects has fallen, most notably public non-housing work (from 50% to 18%), housing repair and maintenance (from 46% to 22%), commercial work (from 45% to 21%) and private industrial work (from 36% to 21%).

Overall around nearly two thirds of all construction workers have only worked on one project type (63%).



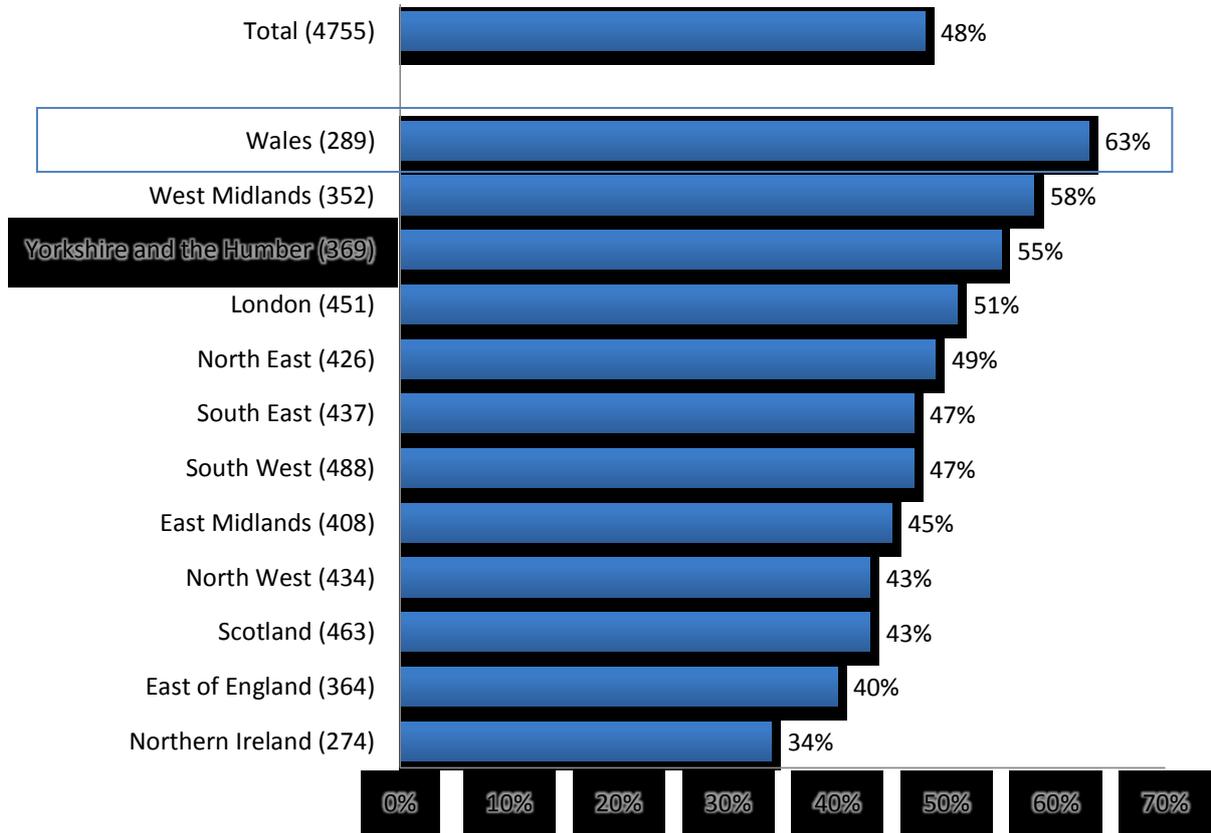
Figure 52: Type of projects spent significant periods on
Base: All respondents

| | WA 2015 % | WA 2012 % | WA 2007 % | UK 2015 % |
|---|---------------------|---------------------|---------------------|---------------------|
| New housing | 86 | 81 | 67 | 83 |
| Housing repair and maintenance including extensions/loft conversions | 22 | 46 | 44 | 36 |
| Commercial work such as shops, office, pubs etc | 21 | 45 | 59 | 35 |
| Private industrial work such as factories, warehousing, mechanical engineering, land reclamation | 21 | 36 | 52 | 30 |
| Public non-housing work such as schools, sports facilities, landscaping | 18 | 50 | 59 | 33 |
| Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations | 18 | 21 | 31 | 21 |
| ONE TYPE ONLY | 63 | 1 | 22 | 48 |
| TWO TYPES | 12 | 35 | 19 | 14 |
| THREE TYPES | 8 | 19 | 16 | 11 |
| FOUR TYPES | 4 | 11 | 18 | 8 |
| FIVE TYPES | 5 | 10 | 14 | 9 |
| SIX TYPES | 6 | 14 | 10 | 9 |
| <i>Unweighted bases</i> | <i>290</i> | <i>428</i> | <i>293</i> | <i>4771</i> |

The number of project types worked on varies significantly by region/nation, as Figure 53 illustrates. Workers in Wales are the most likely to report that their construction workers only work on one project type (63% cf. 48% across the UK).



Figure 53: Proportion of workers that have only worked on one project type
Base: All respondents



Unweighted bases in parentheses

By current trade/occupation, banksmen* (100%), plasters* (100%), plant/machine operatives (70%), site managers (69%) and carpenters/joiners (67%) are most likely to have only worked on one project type, while painters/decorators* (38%), dryliners* (44%) and plumbers* (47%) are least likely. (*Caution: Small sample base.)



Figure 54: Number of sub-sectors worked in, by occupation

Base: All respondents *caution: small sample base

| | Unweighted bases | 1 type % | 2 types % | 3 types % | 4 types % | 5 types % | 6 types % |
|-----------------------|------------------|----------|-----------|-----------|-----------|-----------|-----------|
| Banksman/banksperson* | 5 | 100 | 0 | 0 | 0 | 0 | 0 |
| Dryliner* | 9 | 44 | 33 | 11 | 0 | 0 | 0 |
| Labourer / Gen. Op. | 62 | 63 | 16 | 10 | 0 | 2 | 6 |
| Scaffolder* | 8 | 63 | 13 | 0 | 0 | 25 | 0 |
| Plasterer* | 1 | 100 | 0 | 0 | 0 | 0 | 0 |
| Bricklayer | 39 | 62 | 10 | 10 | 5 | 8 | 3 |
| Plumber* | 19 | 47 | 11 | 16 | 11 | 11 | 5 |
| Plant / Mach. Op. | 23 | 70 | 17 | 0 | 4 | 0 | 4 |
| Carpenter / Joiner | 27 | 67 | 11 | 4 | 0 | 0 | 19 |
| Painter / decorator* | 8 | 38 | 13 | 0 | 13 | 25 | 13 |
| Site manager | 26 | 69 | 0 | 12 | 4 | 8 | 8 |
| Electrician* | 9 | 56 | 0 | 22 | 11 | 0 | 0 |

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 Wales, 3 in 10 construction workers say they definitely will be (30%); a further 51% think it is very or quite likely; 6% consider it unlikely; just 3% say they definitely won't be and a further 3% hope to be retired by then, while 6% 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): 31% believe they will definitely want to be working in the construction sector, 37% believe it is very likely they will want to be working in the construction sector and 16% believe it is quite likely they will want to be working in the construction sector. Only 11% think on any level that they will not want to be working in the construction sector in 5 years time which is similar to 2012 (12%).



Wales' 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 Wales. Since 2012 there has been an increase in the proportion of workers employed directly by companies (from 56% to 66%) and a corresponding decrease in the proportion that are self-employed (from 43% to 27%).

There has also been an increase in the proportion of construction workers in Wales that expect to stay on the site they are currently working on for a year or longer (from 26% to 38%).

In terms of project type there has also been significantly increased stability, with almost two thirds of all construction workers in Wales that have worked on just one project type (63%) compared with just 1% in 2012, and a UK average of 48%. Of all regions/nations in the UK, Wales is most likely to report its' construction workers working on one project type.

Some uncertainty does however remain with more than a third of temporary workers not knowing how much longer they can expect to be working for their current employer/agency (36%) and a fifth of all workers not knowing how much longer they can expect to be on their current site (20%).

In terms of skills and qualifications it is encouraging to note that the vast majority of workers in Wales continue to hold some form of skill card or certificate (92%), although this is slightly lower than the UK average (96%).

Nearly three fifths of construction workers in Wales (58%) hold some form of qualifications, however this proportion has declined since 2012 (70%) and is slightly less than the UK average (63%). The qualifications most likely to be held in Wales are NVQ/SVQ qualifications (63% of those with qualifications cf. 66% across the UK), followed by City & Guilds qualifications (21% cf. 20% across the UK). As has been the case previously, significantly fewer construction workers in Wales hold an apprenticeship (2%) compared to the UK average (13%).

One in eight construction workers in Wales are currently working towards a qualification (12%; the same as the UK average) and 1 in 6 believe they would benefit from training in basic skills (18% cf. 14% across the UK).

In terms of mobility, an increased proportion of construction workers have worked in Wales for their entire construction career compared to 2012 (51% cf. 40%) and, in the majority of cases (83%), workers' last construction sites were in Wales.

Compared to other regions/nations, construction workers in Wales are amongst those least likely to have travelled 100+ miles to work in the last 12 months (15% cf. 21% across the UK). The average (mean) distance from workers' current residence to their current site was 16 miles, compared to the UK average of 22 miles.



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