

Workforce Mobility and Skills in the UK Construction Sector 2015

South West Report





Study prepared by BMG Research from a commission by CITB.

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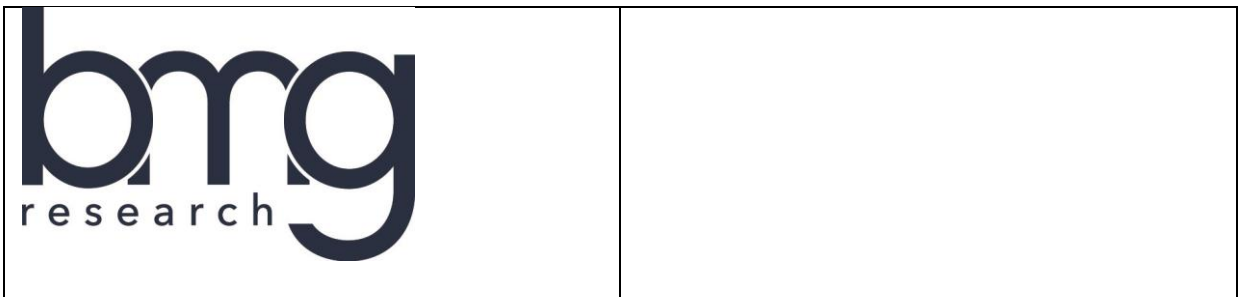




Table of Contents

Executive summary.....	1
Introduction	1
Profile of the sample.....	1
Work history	2
Time in the sector	2
Previous non-construction jobs	2
Occupational switching within the construction sector	2
Qualifications and skills	3
Skills cards/certificates.....	3
Construction-specific qualifications	3
Basic skill needs	4
Current study for qualifications.....	4
Supervisory/managerial training.....	4
Overall skill levels	4
Geographic mobility.....	5
Work history in the region/nation.....	5
Worker origins.....	5
Travel to site.....	5
Site duration and change	6
Sub-sector and sector mobility	6
Sub-sector mobility	6
Leaving the sector	6
Introduction.....	7
Aims and objectives	7
Method	7
Sampling.....	8
Telephone-based site recruitment.....	8
Site visits	8
Notes on reading this report.....	9
Profile of construction site workers.....	10
Personal demographics.....	10
Occupational profile.....	12
Current job role	12
Supervisory roles	13
Employment status	14



Employment contract basis	16
Hours worked.....	16
Work histories	17
Time in the sector	17
Pre-construction employment histories	19
Occupational switching and progression within construction	21
Future career plans.....	22
Qualifications and skills.....	25
Construction skill cards and certificates	25
Construction qualifications held	29
Type of construction qualifications held	32
Additional formal training	32
Supervisory and managerial qualifications and training.....	36
Overall skill levels	38
Geographic mobility	42
Work history in the current region/nation	43
Region/nation worked in before current site.....	46
Worker origins	47
Travel to site.....	49
Relative locations of current workplace to home	49
Furthest distance worked in last 12 months	51
Use of temporary accommodation	52
Journey distance to work	53
Site duration and change.....	53
Expected site/phase duration.....	53
Expected next site location	54
Sub-sector and sector mobility.....	55
Sub-sector mobility	55
Leaving the sector	58
The South West construction workforce 2014-15 summary	59



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 494 interviews were conducted with construction workers in the South West region/nation.

Profile of the sample

- Half of construction workers interviewed in the South West are aged 35 and under (50%), which is a higher proportion compared with the UK population as a whole (37%), and slightly above the UK average in the survey (47%). Just 5% of construction workers in the South West are aged 60 or over.
- Overall 2% of the South West construction workforce is of BME ethnic origin, compared with a higher incidence of 3% in the South West 16 to 64 aged 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 South West sample is accounted for by labourers/general operatives (22%), followed by bricklayers (20%). Compared with 2012 the proportion of labourers/general operatives has increased (from 16%).
- A quarter of all those interviewed in the South West perform a supervisory or management role on their site (25%); the same proportion as nationally.
- Two thirds of construction workers interviewed for the survey are employed directly by a company (67%), which represents an increase compared with 2012 (53%) and is above the UK average (54%). The proportion of self-employed workers has fallen since 2012 (from 41% to 26%), while the proportion of those working for an agency has remained stable (7% in 2015, 6% in 2012). Self-employment is highest amongst those who have been in the industry for 5+ years (29%).
- One in six construction workers in South West are employed on a temporary, rather than permanent basis (18%); this is a lower proportion than the UK average (23%). By occupation the proportion is highest amongst bricklayers (27%).
- Construction workers in the South West work an average of 44 hours per week, with a quarter that work more than 50 hours per week (25%). The South West is broadly in line with the UK average (23%) in this respect.



Work history

Time in the sector

- Nearly a third of all South West construction workers have worked in the industry for at least 20 years (31%), the same proportion as nationally. A total of 55% have done so for 10+ years.
- Two thirds of construction workers in the South West have only ever worked within the construction industry (66%); this is just below the UK average (70%). This proportion includes around half who have worked pretty much continuously, without spells out of work (52% cf. 55% across the UK).

Previous non-construction jobs

- Amongst the quarter of construction workers in the South West that worked in another sector before starting work in construction (26% of all respondents), the sectors worked in beforehand are most likely to be either the manufacturing sector (21%) or the wholesale/retail sector (20%), while 1 in 6 had worked in accommodation and food services (17%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trades occupations (28%), followed by elementary administration and service occupations (21%).

Occupational switching within the construction sector

- More than a third of all construction workers in the South West have worked in more than one trade or occupation whilst working in the construction industry (36%), in line with the UK average (34%) and significantly more than in 2012 (14%). The proportion that has worked in more than one role increases with age (to 44% amongst those aged 45+ cf. 18% amongst those aged 16 to 19) and is significantly higher amongst those who are employed by an agency (58%) compared with those who are self-employed (28%) or employed directly (37%).
- Workers are most likely to have previously worked as a labourer/general operative (28%); while 1 in 5 have worked as a carpenter/joiner (21%) and 1 in 8 as a bricklayer (13%).
- Thinking about their future plans in the construction sector, three quarters of construction workers in the South West would like to carry on in the same trade or occupation (76%), while 1 in 8 would like to change their trade/occupation (12%) and a further 1 in 20 would like to leave the construction altogether (5%). The proportion that wants to carry on as they are is slightly lower in the South West than the UK average (79%).
- The most frequently mentioned occupation that construction workers in the South West would like to change to is site manager (35% of those who would like to change).
- In nearly three quarters of cases where South West construction workers would like to change trade/occupation they believe they will require further training or qualifications in order to do so (72%). 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 (65%), while more than half of those wishing to change trade would like to make better use of their skills or abilities (56%).



Qualifications and skills

Skills cards/certificates

- The vast majority of all construction workers in the South West (96% cf. 97% in 2012), as across the UK as a whole (also 96%), hold some form of construction skill card or certificate.
- Younger workers (82% of 16-19 year olds) and those who have worked in construction for less than a year (83%) are less likely to hold a skill card/certificate.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (89% in the South West; 86% across the UK).
- Card colours vary by age and particularly by occupation; labourers/general operatives are most likely to hold Green cards (69%), while electricians (42%) and carpenters/joiners (35%) are most likely to hold Gold skill cards.

Construction-specific qualifications

- More than three fifths of construction workers in the South West say they had no formal qualifications when they first started working in the construction industry (63%). This compares with a slightly higher UK average (75%).
- By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst banksmen (100%), labourers/general operatives (87%) and plant/machine operatives (86%), whilst electricians (29%), site managers (32%) and plumbers (33%) are least likely to have started with no formal qualifications.
- Compared with just over a third of construction workers in the South West that did have qualifications when they first started working in construction, nearly three quarters of all construction workers in the region reported holding some sort of construction related qualification at the time of interview (72% cf. 73% in 2012), a higher proportion than the UK average (63%).
- The proportion of workers that currently hold any qualifications is lower than average amongst workers who have worked in construction for less than a year (54%) and workers employed by an agency (59%).
- By trade/occupation proportions vary from 100% of site managers and 92% of electricians, down to around half (47%) amongst labourers/general operatives.
- The qualifications most likely to be held by construction workers in the South West are NVQ/SVQ qualifications (62% of those with qualifications); this is a lower proportion to that reported in 2012 (71%) and slightly below the UK average (66%). Around 1 in 5 construction workers in the region with qualifications hold City & Guilds qualifications (21%; 19% in 2012 and 20% across the UK). A further 1 in 5 construction workers with qualifications now hold an apprenticeship (21%), which is a significant increase compared with 2012 when just 1% did, and is also above the UK average (13%).



Basic skill needs

- One in eight construction workers in the South West believe they would benefit from some form of training in basic skills (12%), compared with a significantly higher proportion of 28% in 2012. The proportion in the South West is broadly in line with the UK average (14%).
- In terms of the type of training required, 7% of workers would like training in maths, 4% in reading or speaking English, and 3% in writing.

Current study for qualifications

- Overall 15% of construction workers in the South West are currently working towards any formal qualifications relevant to the construction industry. This is the same proportion as in 2012 and compares with a UK average of 12%. The likelihood that workers are working towards qualifications is significantly higher amongst 16-19 year olds (73%) and amongst those who have worked within the construction industry for less than two years (45% amongst those with less than a year's experience, 50% amongst those with 1 to 2 years experience).
- Amongst workers with no qualifications, 1 in 9 are currently working towards one (11%).
- In aggregate, four fifths of those who are working towards qualifications are working towards those equivalent to Level 2 (32%) or 3 (48%).

Supervisory/managerial training

- Of those not currently performing a supervisory/management role nearly half are certain that they would not like to do so (47%; 53% across the UK), while around 3 in 10 would like to do so (29%; 26% across the UK) and nearly a quarter are unsure (23%; 21% across the UK).
- Just over a quarter of all construction workers in the South West (27%) and 7 in 10 of those who have had some form of supervisory or management responsibilities (71% cf. 67% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.
- In-house training (40%) is the most likely type of training to have been received, followed by a Site Safety Supervisors Course (37%) and SMSTS (36%).

Overall skill levels

- The vast majority of construction workers in the South West (99%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. Just under a quarter of South West construction workers (23%) hold a skill card/certificate, but have no other construction qualification. This compares with a UK average of 30%.
- Overall, more than a quarter of construction workers in the South West have no qualifications (28% cf. 27% in 2012 and a 2015 UK average of 37%) the majority have qualifications equivalent to Level 2 or above (65% cf. 63% in 2012 and 58% across the UK in 2015). A third of all South West construction workers (33% cf. 25% in 2012) hold qualifications equivalent to Level 3 or above; this proportion is higher than average amongst plumbers (64%).



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 within the South West (73%); this proportion is higher than in 2012 (63%) and higher than the 2015 UK average (61%). The second main reason for their location is due to their employer sending them there (in 22% of cases). This is mentioned by a greater proportion of younger workers aged 16 to 19 (30%) compared to those aged 45+ (12%).
- Half of all construction workers in the South West have worked within their current region for their entire construction career (50% cf. 48% in 2012) and the majority of construction workers in the region have remained in the South West for all or most of their career (83%). This compares with a UK average of 80%.
- Thus, in the majority of cases, the last site workers were based at was also in the South West (76%).

Worker origins

- Overall three quarters of all construction workers in the South West were interviewed in the same region in which they were living in when they started their construction career (76%). By region/nation, the highest proportion is 97% in Northern Ireland, while the lowest proportion is 50% in London.
- Three quarters of construction workers in the South West (76%) have remained in the same region as they did their first qualification/training in, a slight increase compared with 2012 (72%). By region/nation, the highest proportion is 96% in Northern Ireland, followed by 95% in Scotland. 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 half of construction workers in the South West have travelled at least 50 miles from their permanent/current home to work in the last 12 months (51%). Across the regions/nations, South West construction workers are amongst those most likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (25%).
- Overall 7% of construction workers in the South West (3% in 2012) are currently staying in temporary accommodation while working at their site. This proportion is similar to the UK average (6%) and on a par with Scotland (7%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 24 miles, which is slightly less than in 2012 when workers travelled an average of 26 miles. This compares to a UK average of 22 miles.



Site duration and change

- Around a third of the temporary workers in the South West (31%) do not know how much longer they can expect to be working for their current company/agency. This is lower than the UK average of 43%.
- When all respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase just over a quarter expect to stay on that site for a year or longer (27% cf. UK average of 26%), which is a significant increase compared with 2012 (17%), suggesting some improvement with regard to stability. However in a further one quarter of cases (24% cf. 20% 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.
- Almost three quarters of all South West construction workers are confident that when they finish their current job their next job will allow them to travel to work from their permanent home on a daily basis (73% cf. 72% in 2012). The remaining quarter say it depends/they don't know or that they won't be able to commute. Compared with workers in other regions/nations, those in the South West are amongst the most confident in this respect.

Sub-sector and sector mobility

Sub-sector mobility

- Compared with 2012 there has been an increase in the proportion of construction workers that have been working on new housing in the South West, up from 76% to 83%. This echoes the national trend. For all other types of projects the proportion of construction workers that have worked on them has fallen since 2012.
- Overall nearly half of all construction workers have only worked on one project type (47%), compared with a closer to a quarter in 2012 (28%), which again suggests a pattern of increased stability in the sector.
- The number of project types worked on varies significantly by region/nation. The South West is close to the UK average (48%) and on a par with the South East (47%) in terms of the proportion of its' construction workers working on one project type. Across regions/nations, the highest proportion is in Wales (63%) and the lowest is in Northern Ireland (34%).

Leaving the sector

- In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years time they will still want to be working in construction. Amongst construction workers of all ages in the South West almost half say they definitely will be (48%); a further two fifths think it is very or quite likely (38%); 5% consider it unlikely; just 2% say they definitely won't be and a further 3% hope to be retired by then, while 4% 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/geographical area 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, 494 interviews were conducted in the South West.



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 South West is abbreviated as SW in the tables for brevity of presentation.

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%). Similarly the proportion of workers aged 25 to 34 years is similar to that reported in 2012 (28%, compared with 29%); as is the proportion of workers aged 35 to 55 (38%, compared with 41%) and 55 and over (11%, compared with 8%). Workers aged 60 and over account for just 5% of construction workers.

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



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

Base: All respondents

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %		UK Workforce* %
16 to 19 years	8	6	7	5	16 to 19 years	4
20 to 24 years	14	15	16	13	20 to 24 years	10
25 to 34 years	28	29	20	29	25 to 34 years	23
35 to 44 years	18	23	25	22	35 to 49 years	34
45 to 54 years	20	18	20	20	50 to 64 years	26
55 to 59 years	6	8	11	6		
60+ years	5			4	65+ years	3
<i>Unweighted bases</i>	<i>494</i>	<i>407</i>	<i>255</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 the South West are of White origins (98% as in 2012). Within this proportion 1% describe themselves as White Irish (cf. <0.5% in 2012) and 4% as 'White Other' (cf. 1% in 2012).

Workers of Black (1%) 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

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %	UK Population aged 16-64* %
White	98	98	98	94	87
Black	1	<0.5	2	2	3
Asian	<0.5	<0.5	0	1	5
Other/Not stated	<0.5	2	0	3	5
<i>Unweighted bases</i>	<i>494</i>	<i>407</i>	<i>255</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 South West sample are BME, compared with a higher incidence of 4% of the UK sample and 3% across the South West 16 to 64 aged population.

Compared with other regions, the South West has a relatively 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	1
<i>Unweighted bases</i>	<i>4771</i>	<i>4933</i>	<i>3877</i>	<i>32,480,800</i>

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

Overall most South West construction workers have lived in the UK all of their life (91%). This proportion is significantly higher than the UK average (84%).

Amongst all South West construction workers 3% indicate that they have a long term illness, health problem or disability which limits the type of work they can do. The most common illness/disability amongst these workers is a reduced physical capacity (62%), followed by problems to do with mobility, such as a wheelchair user, having an artificial lower limb, using walking aids, having rheumatism or arthritis (31%). Across the UK, the same proportion (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, labourers/general operatives, bricklayers and carpenter/joiners are the top three occupations amongst construction workers in the South West (reflecting the profile across the UK). Within the South West, there has been an increase in the proportion that are labourers/general operatives (22%, 16% in 2012). The occupational profile in the South West is similar to that of the UK as a whole.



Figure 5: Occupational profile

Base: All respondents

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %
Labourer/General operative	22	16	12	18
Bricklayer	20	20	15	15
Carpenter/joiner	10	12	16	11
Site manager	8	0	0	8
Electrician	6	8	7	5
Plant/machine operative (e.g. Fork lift/JCB)	5	6	18	7
Scaffolder	4	6	2	4
Dryliner	3	3	With plasterer	3
Ground worker	3	0	0	4
Plumber	2	6	3	5
Painter/decorator	2	5	1	3
Roofer	2	4	3	2
Technical e.g. surveyor, maintenance technician	2	1	2	2
Steel erector	2	1	2	1
Plasterer	1	2	8	2
Banksman/banksperson	1	2	1	2
Welder	1	2	1	<0.5
Floorer	1	1	2	1
Supervisor/foreman	1	<0.5	8	1
<i>Unweighted bases</i>	<i>494</i>	<i>407</i>	<i>255</i>	<i>4771</i>

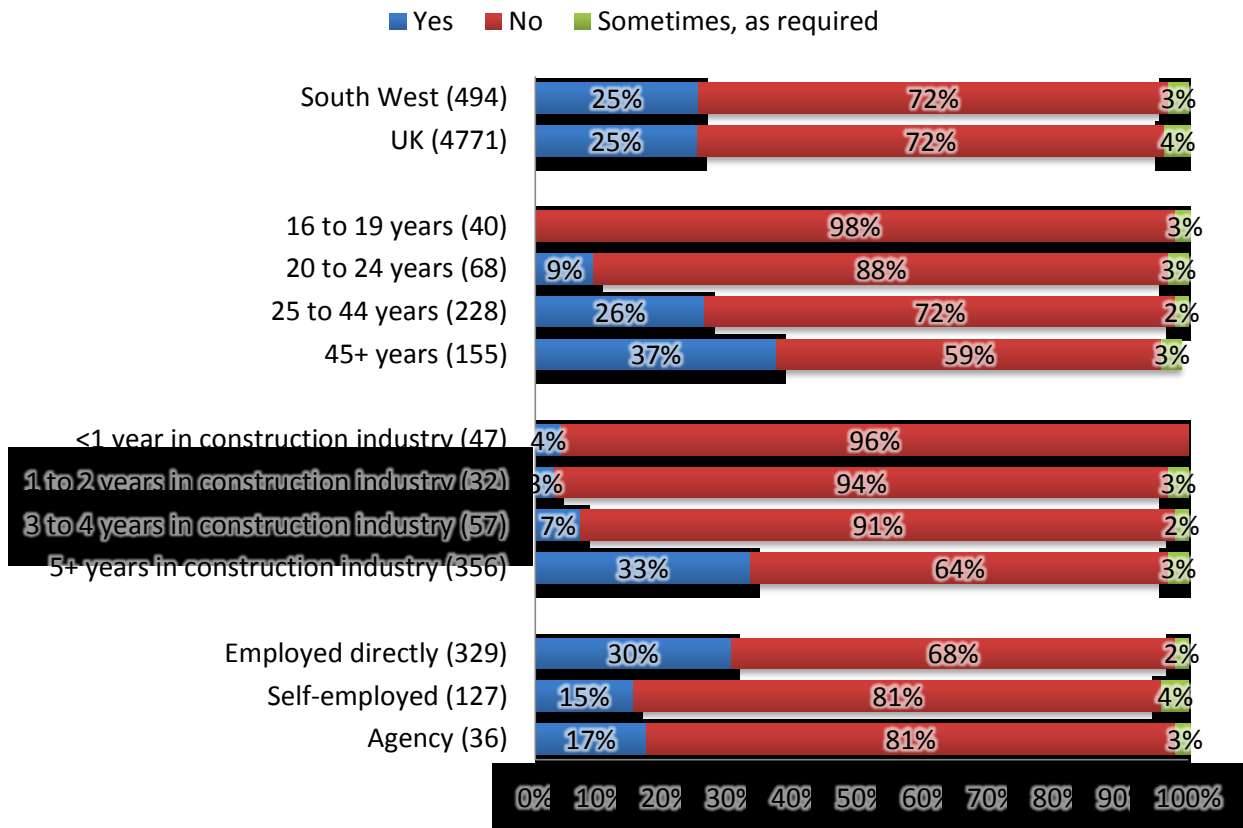
Supervisory roles

A quarter of all construction workers in the South West interviewed for the 2015 survey say they perform a supervisory or management role on their site (25%). This is the same proportion as nationally.

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 (30%) are significantly more likely than those that are self-employed (15%) or work for an agency (17%) 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



Unweighted bases in parentheses

Employment status

Two thirds of construction workers in this year’s South West sample are directly employed by a company (67%); this has increased compared with 2012 (53%) and is now above the UK average (54%).

The next highest proportion of construction workers within the South West is self-employed (26%), which is lower than in 2012 (41%). The proportion of workers who are self-employed is highest amongst respondents who have been working in the construction sector amongst those with 5+ years experience (29%).

Just 7% of the sample is accounted for by construction workers who are working for an employment agency. This is summarised in the following table.



Figure 7: Employment status

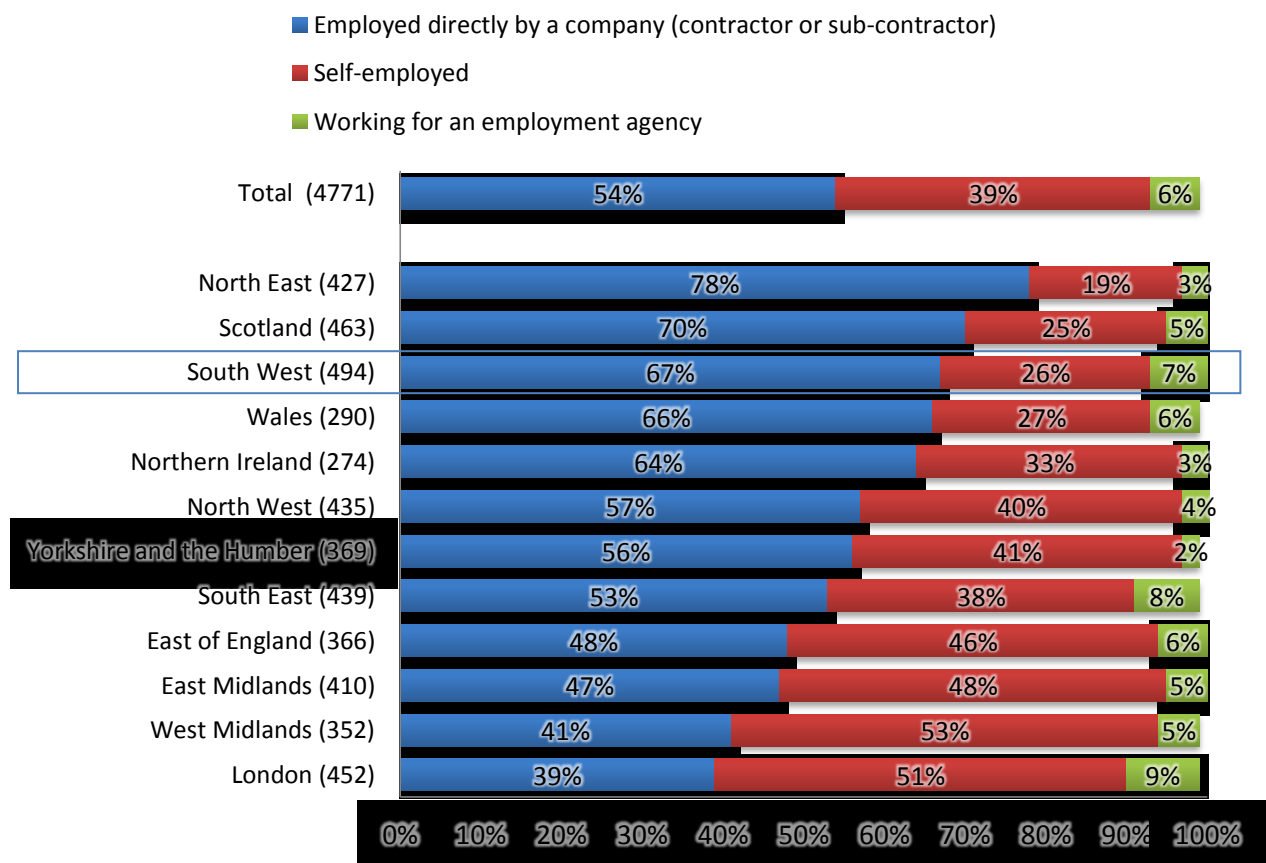
Base: All respondents

	SW 2015	SW 2012	UK 2015	Years working in construction			
	%	%	%	<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	67	53	54	77	84	67	64
Self-employed	26	41	39	17	6	23	29
Working for an employment agency	7	6	6	6	9	11	7
Working on some other basis	<0.5	0	<0.5	0	0	0	1
<i>Unweighted bases</i>	494	407	4771	47	32	57	356

The proportion employed directly is higher in the South West than the UK average (67%, compared with 54%), while the proportion that are self-employed is lower (26%, compared with 39%). The South West has an employment status profile that is most similar to Wales.

Figure 8: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses



Employment contract basis

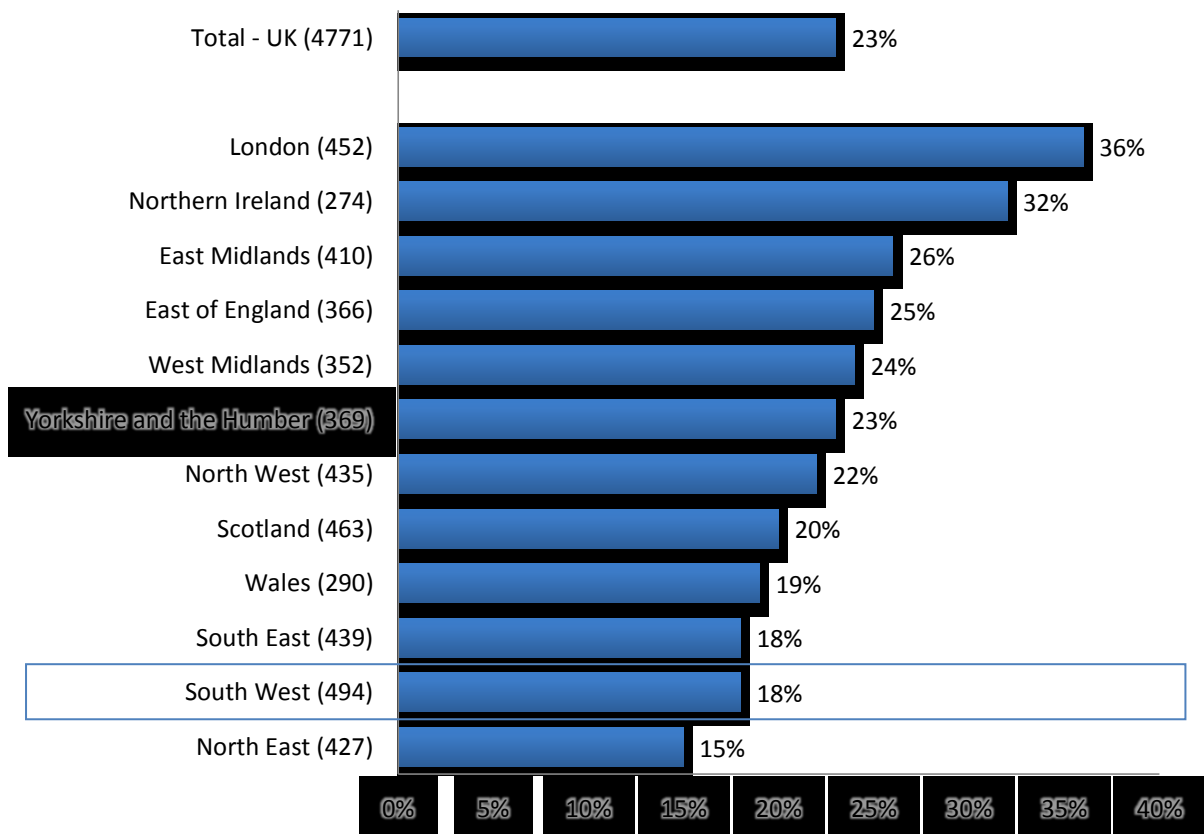
Overall, 1 in 6 South West construction workers (18%) are employed on a temporary, rather than permanent basis (79%). The remainder believed they had an ‘other’ type of contract arrangement (2%), did not know (1%) or refused (<0.5%).

Amongst workers who are employed by an agency the proportion on temporary contracts is significantly higher, as one would expect (81%), as it is amongst those who are self-employed (33%) or employed directly (5%).

Alongside the North East (15%) and the South East (18%), the South West has the lowest proportion of workers employed on a temporary basis, 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 bricklayers (27%) and lowest amongst roofers and plasterers (both 0%*) and scaffolders (5%). (*Caution: Small sample base)

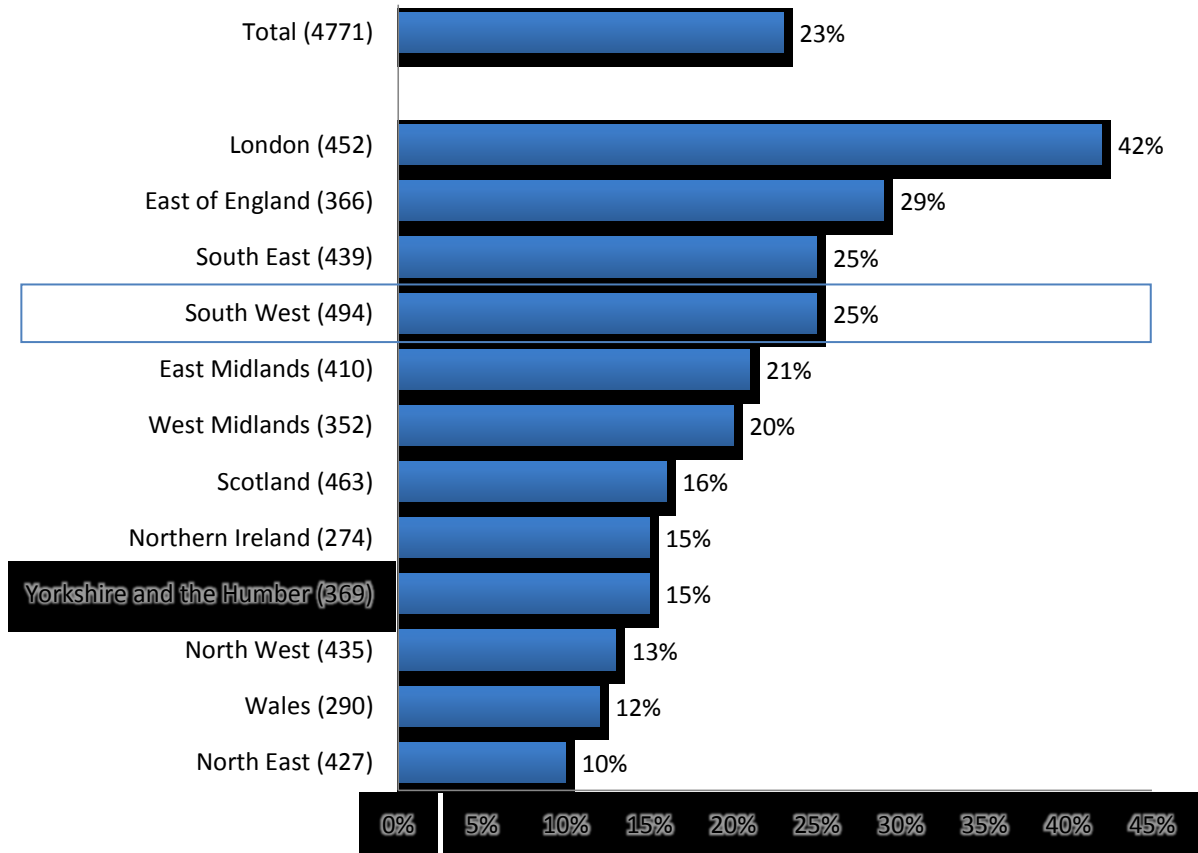
Hours worked

On average construction workers in the South West report that they typically work 44 hours per week, with 62% that tend to work between 40 and 49 hours per week and a quarter that work more than 50 hours (25%).



The proportion that works more than 50 hours per week is broadly in line with the UK average (23%) amongst South West construction workers, and on par with the South East (25%).

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

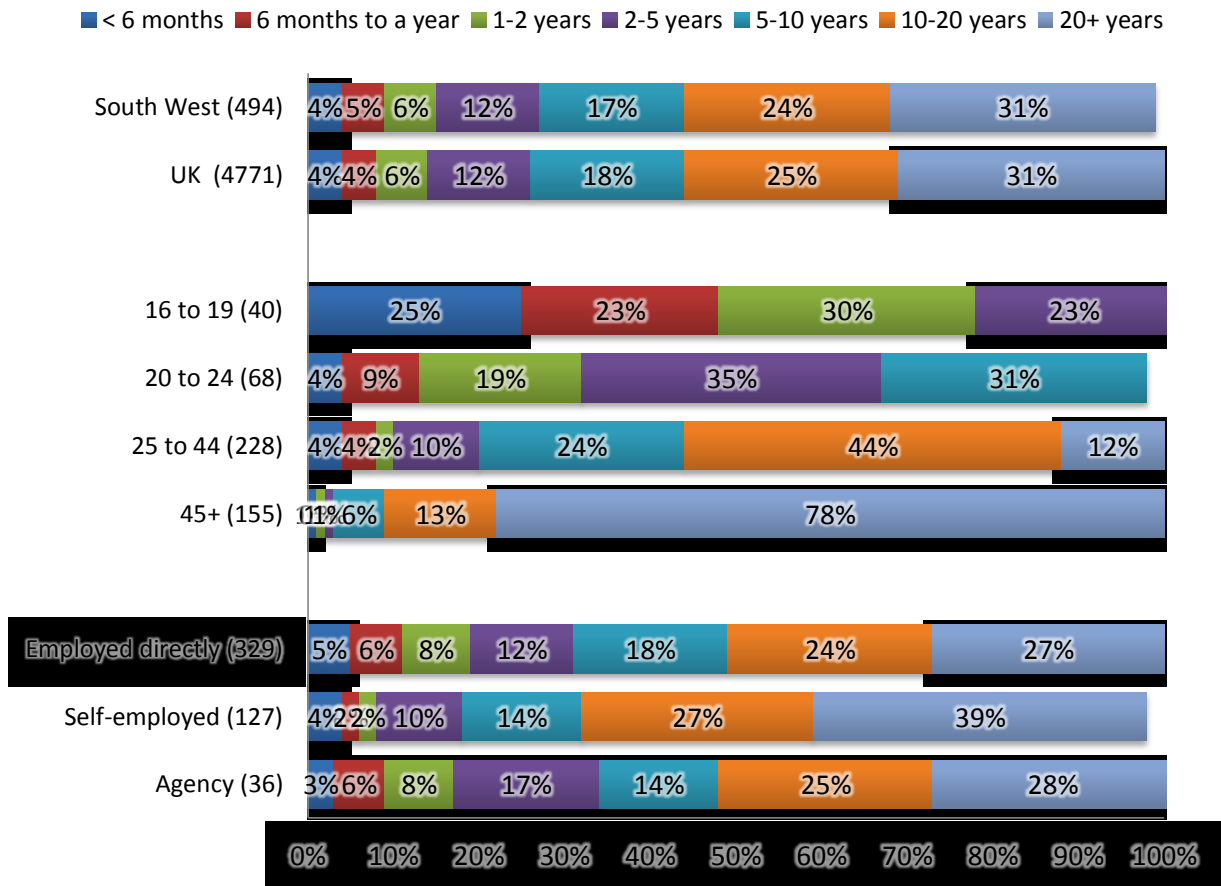
Nearly a third of South West construction workers have worked in the construction industry for over 20 years (31%) and more than half have worked in the industry for at least 10 years (55%).

Construction workers in the South West are very similar to the UK average in terms of how long they have worked in industry for.

As one would expect the length of experience in the industry increases with age to 78% of workers aged 45 and over in the South West that have more than 20 years experience of working in the construction sector.



Figure 11: Years spent working in the construction sector
 Base: All respondents



Unweighted bases in parentheses

Compared with 2012 Figure 12 shows that in 2015 workers in the South West are more likely to have worked in the construction sector 5 years or less (27% cf. 21% in 2012), bringing the proportions in line with the UK average.

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

	SW 2015	SW 2012	SW 2007	UK 2015
	%	%	%	%
Less than 6 months	4	1	2	4
Up to a year	9	4	7	8
Up to 2 years	15	9	15	14
Up to 5 years	27	21	31	26
Up to 10 years	44	42	44	44
Up to 20 years	68	67	67	69
More than 20 years	31	33	32	31
Unweighted bases	494	407	255	4771



Pre-construction employment histories

Two thirds of workers in the South West have only ever worked in the construction industry (66% cf. 70% across the UK and 69% within the South West in 2012). This includes more than half who have worked in construction pretty much continuously (52%); 11% for whom this is their first job; and a further 3% that have only ever worked in the construction sector, but have had spells out of work.

The likelihood that workers have worked continuously in construction increases with age; up to 7 in 10 workers aged 45 and over (70%). Whilst, as one would expect, younger workers are more likely to say that this is their first job and that they have not worked in any other industry (33% 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

	SW 2015 %	UK 2015 %	Age %			
			16 to 19	20 to 24	25 to 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	52	55	38	29	50	70
I have only worked in construction jobs but have had spells of being out of work	3	6	3	3	2	3
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	6	8	3	9	7	5
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	23	19	20	26	25	18
This is my first job. I haven't worked in any other industry.	11	9	33	28	10	1
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	3	3	3	3	4	2
Prefer not to say	2	2	3	1	3	1
<i>Unweighted bases</i>	<i>494</i>	<i>4771</i>	<i>40</i>	<i>68</i>	<i>228</i>	<i>155</i>

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

Those who had worked in other sectors before starting their construction careers (26% of all respondents) were asked to give details of what they were doing immediately before they started working in construction. Two fifths of these respondents had previously worked in either the manufacturing sector (21%) or the wholesale/retail sector (20%), while 1 in 6 had worked in accommodation and food services beforehand (17%).

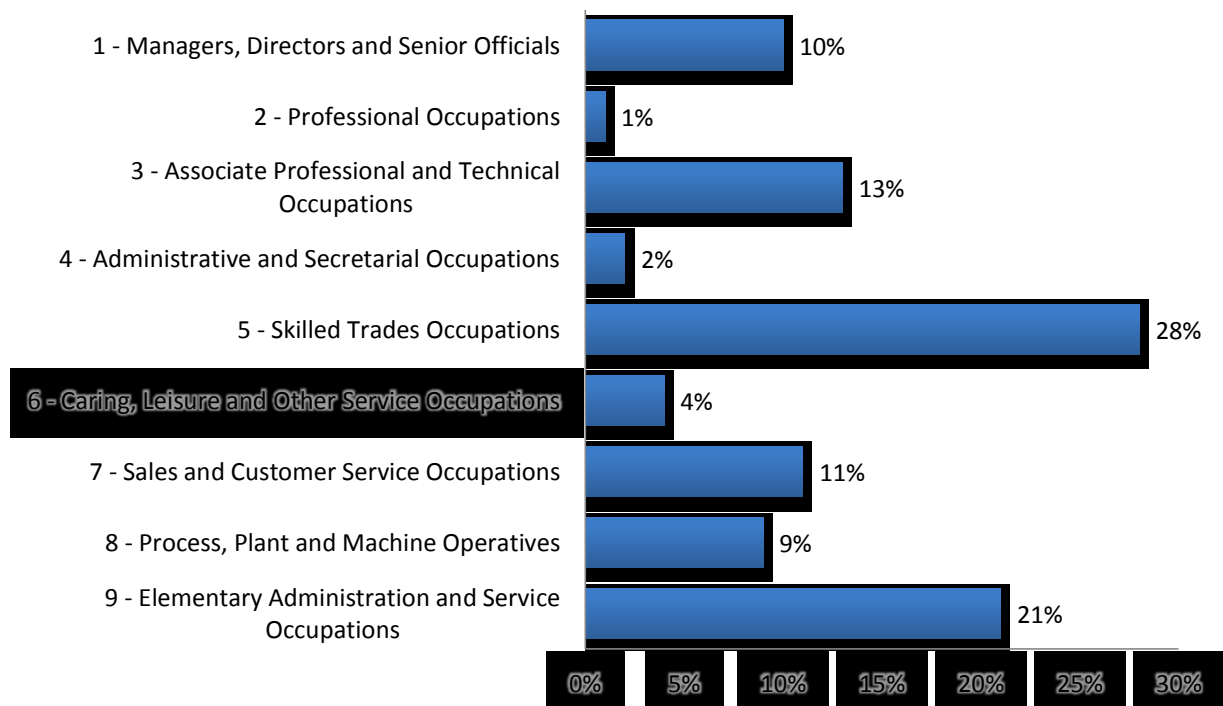


Figure 14: Industry worked in before starting work in the construction sector
Base: Where first job was not in construction

	SW 2015 %	UK 2015 %
C – Manufacturing	21	20
G – Wholesale and retail trade; repair of motor vehicles and motorcycles	20	22
I – Accommodation and food service activities	17	10
H – Transportation and storage	9	10
O – Public administration and defence; compulsory social security	7	6
A – Agriculture, Forestry and Fishing	6	6
R – Arts, entertainment and recreation	5	4
N – Administrative and support service activities	3	6
J – Information and communication	3	2
M – Professional, scientific and technical activities	2	2
S – Other service activities	2	<0.5
K – Financial and insurance activities	1	1
P – Education	1	1
Q – Human health and social work activities	1	1
<i>Unweighted bases</i>	<i>127</i>	<i>983</i>

In terms of the job roles that South West respondents have undertaken in other sectors, the highest proportion has worked in skilled trades occupations (28% cf. 39% in 2012 and 29% across the UK in 2015) and a further fifth has worked in elementary administration and service occupations (21% cf. 29% in 2012 and 21% across the UK in 2015).

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



Unweighted base = 127



Occupational switching and progression within construction

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

Overall more than a third of all construction workers in the South West have worked in more than one construction trade or occupation whilst working in the construction industry (36%). This represents a significant increase compared with 2012 when just 1 in 7 had worked in more than one role (14%). The proportion in the South West is broadly in line with the UK average (34%).

As one would expect the proportion of workers that have had more than one role increases with age (to 44% amongst those aged 45+ cf. 18% amongst those 16 to 19 years).

The proportion that has worked in more than one role is also significantly higher amongst those who are employed by an agency (58%) compared to those who are employed directly (37%) and the self-employed (28%). Workers with the highest level of qualifications (Level 4 and above) are also more likely to have had more than one role or occupation within the construction sector (63%), as are those in a supervisory or management role on site (46%).

As in 2012, there are also variations by current job role, with plasterers (75%*) and site managers (69%) most likely to have had more than one role/occupation within construction. Painter/decorators (8%*) and plumbers (9%*) 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		
	SW 2015 %	UK 2015 %		SW 2015 %	UK 2015 %
Plasterer* (4)	75	34	Carpenter / Joiner (49)	27	18
Site manager (35)	69	69	Electrician (31)	23	13
Plant / Mach. Op. (24)	58	55	Roofer* (6)	17	29
Banksman /banksperson* (4)	50	46	Bricklayer (101)	16	19
Scaffolder (20)	45	31	Plumber* (11)	9	13
Dryliner* (12)	42	38	Painter / decorator* (12)	8	27
Labourer / Gen. Op. (106)	37	33			

Unweighted bases for 2015 South West 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 (28%) while 1 in 5 workers has previously worked as a carpenter/joiner (21%) and 1 in 7 as a bricklayer (13%).

Figure 17: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	SW 2015 %	UK 2015 %
Labourer/General operative	28	30
Carpenter/joiner	21	18
Bricklayer	13	13
Plumber	9	5
Plant/machine operative (e.g. Fork lift/JCB)	8	10
Dryliner	8	7
Roofer	7	9
Banksman/banksperson	7	7
Plasterer	7	7
Painter/decorator	6	8
Electrician	6	3
Site manager	5	5
Ground worker	4	5
Ceiling fixer	4	4
Pipe fitter	3	5
Technical e.g. surveyor, maintenance technician	3	4
Scaffolder	3	4
Steel erector/rigger	2	3
Welder	2	2
Supervisor/foreman	2	1
Floorer	1	3
Concrete worker	1	1
Mechanical fitter	1	1
Demolition worker	1	<0.5
Other	5	6
<i>Unweighted bases</i>	<i>179</i>	<i>1576</i>

Future career plans

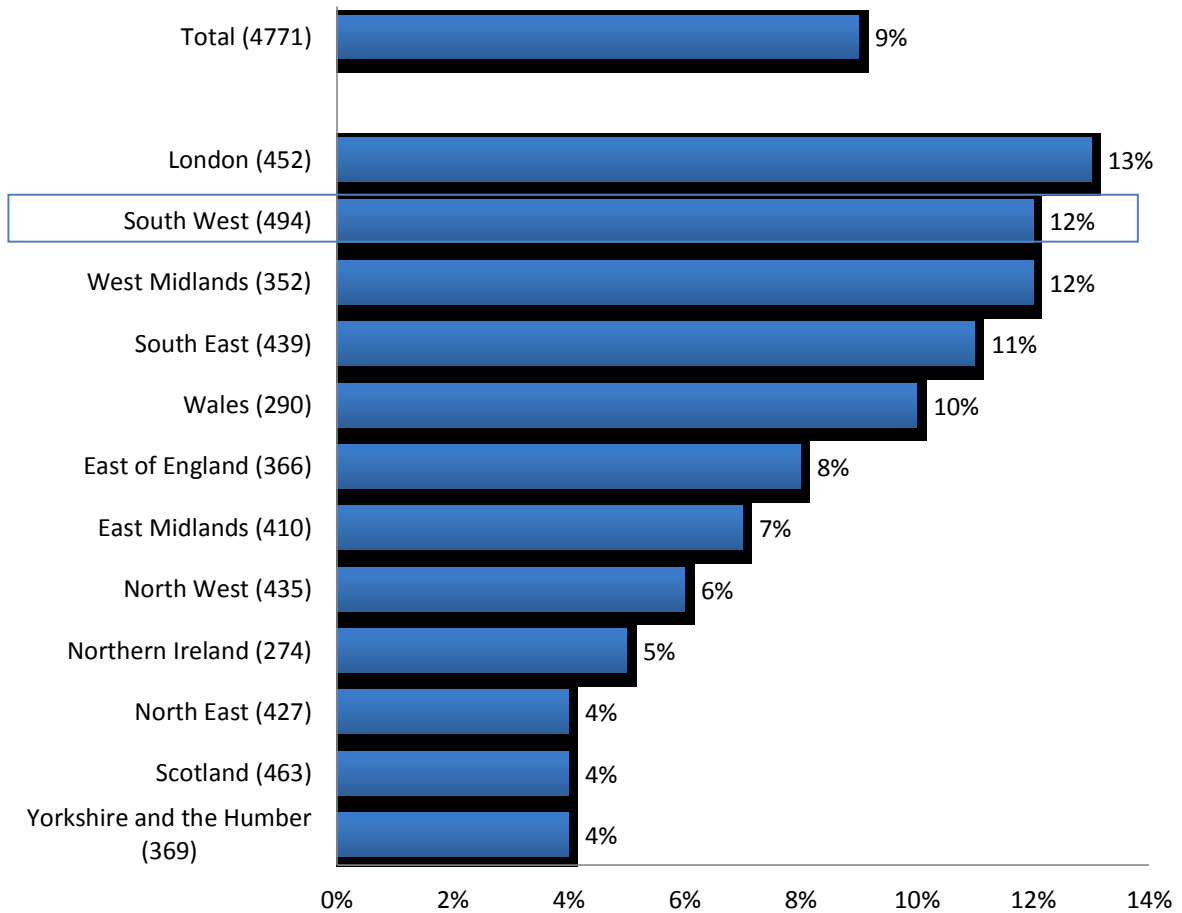
Thinking about their future plans in construction, three quarters of construction workers in the South West would like to carry on in the same trade or occupation (76%); 1 in 8 would like to change their trade/occupation (12%); and a further 1 in 20 would like to leave construction (5%); the remainder are not sure.

Compared with the UK average, South West construction workers are a little less likely to want to carry on as they are (79% across the UK) and more likely to 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



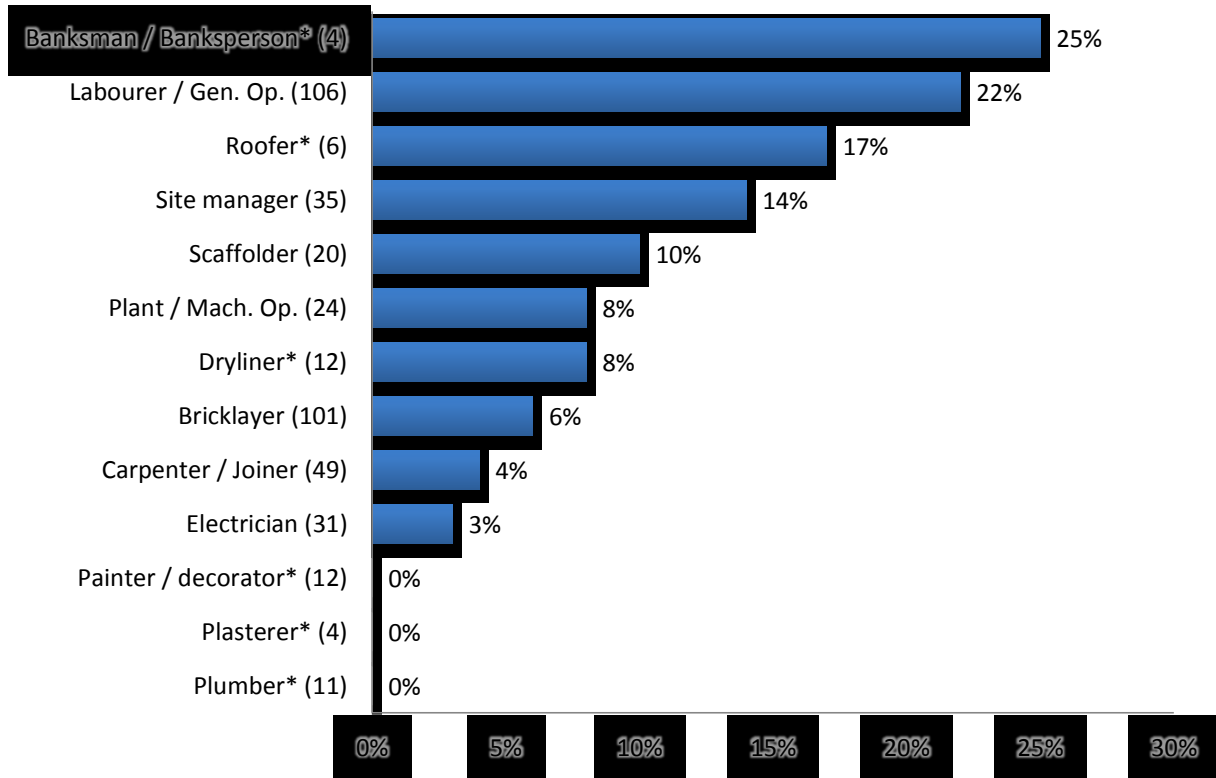
Unweighted bases in parentheses

Construction workers currently working for an agency (28%) are more likely than those employed directly (11%) or self-employed (9%) to want to change their trade or occupation; whilst by current trade/occupation those working as a banksman/banksperson (25%*) or a labourer/general operative (22%) are most likely to, as the following chart illustrates. (*Caution: Small sample base)



Figure 19: Proportion of construction workers that would like to change their trade or occupation, by current trade/occupation

Base: All respondents *caution: small sample base



Unweighted bases in parentheses

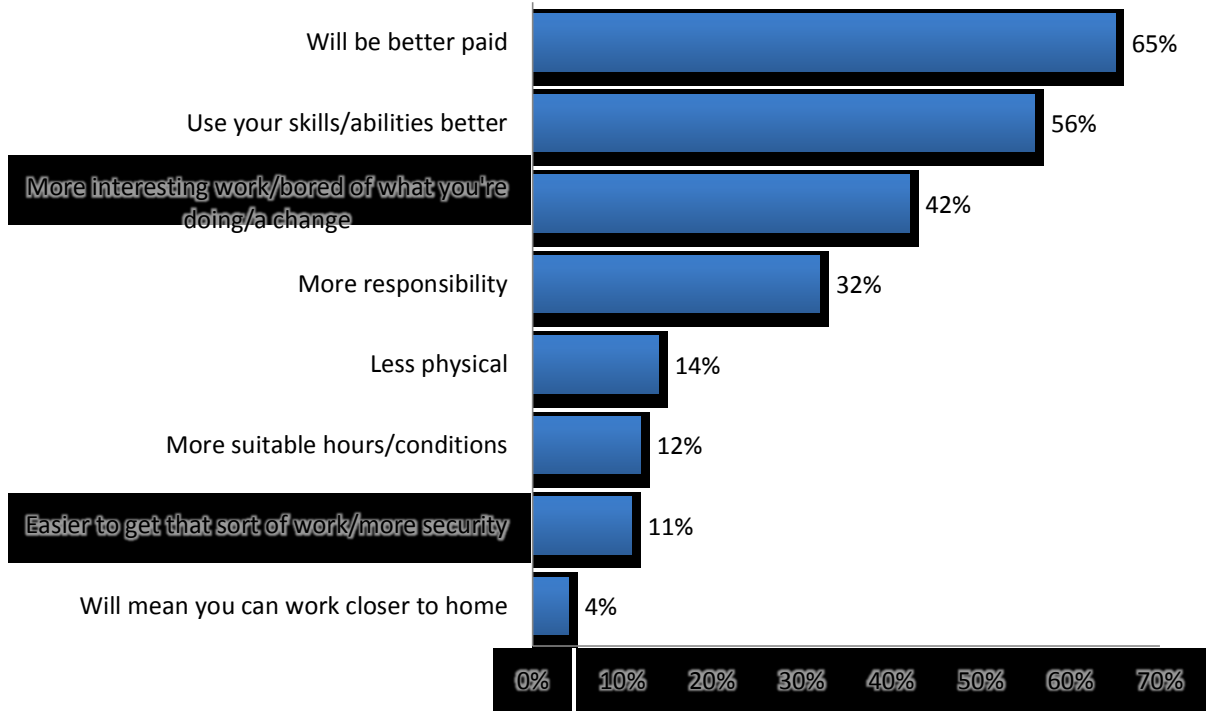
Amongst those who would like to change trade or occupation a wide range of alternative trades/occupations are mentioned, however the highest proportion overall would like to be a site manager (35%).

In nearly three quarters of all cases where construction workers in the South West would like to change trade or occupation they believe they will require further training or qualifications in order to do this other kind of work (72%). 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 (65%), while more than half of those wishing to change trade would like to make better use of their skills or abilities (56%). Over two fifths believe they would have more interesting work or that they are bored with what they are currently doing (42%) and around a third would like more responsibility (32%).



Figure 20: Reasons for wanting to change trade/occupation
 Base: Where workers would like to change trade/occupation



Qualifications and skills

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

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

Construction skill cards and certificates

When asked which type of construction skill certificate or card they currently hold (e.g. CSCS or CSR) just 4% of all construction workers in the South West (2% nationally) say they do not hold any card. Therefore 96% of all workers 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 21 summarises the proportion of workers by region/nation that hold any card and compares these proportions with the 2012 survey. Workers in the South West have the same proportion of workers with a skill card/certificate to the North East and East of England (all 96%). There has been a very slight decline in this respect in the South West since 2012 (97%); although the increase in the proportion of workers in the South West, as across all regions, that have a skill card/certificate since 2007 is significant.

Figure 21: Proportion of workers that have a skill card/certificate, by region/nation

Base: All respondents

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

As in 2012, the incidence of workers holding skill cards or certificates remains lower amongst younger workers (82% amongst 16 to 19 year olds) and those who have worked within construction for a shorter period of time (83% amongst those that have worked in the industry for less than a year). This suggests that employers are not always ensuring that new employees are immediately made aware of the need to prepare for, or acquire a CSCS card (or similar) and/or that young trainees are starting work/placements without the assurance that comes from having achieved such an accreditation.



Figure 22: Proportion of workers that have a skill card/certificate, by other variables
Base: All respondents

		SW 2015	SW 2012	SW 2007	UK 2015
		%	%	%	%
Total (494)		96	97	70	96
Age	16 to 19 years (40)	82	91	39	85
	20 to 24 years (68)	96	97	67	95
	25 to 44 years (228)	97	99	74	97
	45+ years (155)	97	96	72	95
Length of time in construction	<1 year in construction (47)	83	94	23	88
	1 to 2 years (32)	91	86	58	96
	3 to 4 years (57)	96	97	71	96
	5+ years (356)	98	98	75	96
Contract-type	Employed directly (329)	95	96	68	95
	Self-employed (127)	98	99	74	97
	Agency (36)	100	100	0	95
<i>Unweighted bases for 2015 South West in parentheses</i>					

In terms of the type of skill card or certificate held by construction workers in the South West the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (89%), as it was in 2012 (91%). Overall 12% hold the CPCS (Construction Plant Competence Scheme) card/certificate and 4% hold the CISRS (Construction Industry Scaffolders Record Scheme) card/certificate.

Figure 23: Type of skill card/certificate held
Base: All respondents

	SW 2015	SW 2012	UK 2015
	%	%	%
CSCS (Construction Skills Certification Scheme) (GB)	89	91	86
CSR (Construction Skills Register) (NI)	1		3
CISRS (Construction Industry Scaffolders Record Scheme)	4	3	4
CPCS (Construction Plant Competence Scheme)	12	9	13
Other	4	6	4
<i>Unweighted bases</i>	<i>494</i>	<i>420</i>	<i>4771</i>

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

- Plant/machine operatives (92%) are more likely to hold CPCS (Construction Plant Competence Scheme);
- Seven in ten scaffolders (70%) hold CISRS (Construction Industry Scaffolders Record Scheme);



- At least 95% of dryliners*, banksmen*, roofers*, painters/decorators*, plasterers* and site managers hold CSCS (Construction Skills Certification Scheme (GB)); (*Caution: Small sample base)
- A fifth of electricians hold other types of skill cards/certificates (19%).

Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 24 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Among CSCS card holders in the South West, 10% have red cards, 36% have green cards, 23% have blue cards and 18% have gold cards. Among the six CSR card holders, three have green cards, one has a red card, one has a blue card and one has a gold card.

Figure 24: Colour of CSCS/CSR cards held

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

	CSCS %		CSR* %
Red - Trainee	7	Red - Apprenticeship/Trainee	17
Red - Experienced worker card	3	Red - Trained Plant Operator	0
Green - construction site operative card for general site workers	36	Green - Construction Operative (for general site workers)	50
Blue - skilled	23	Blue - Operative/ Craft	17
		Blue - Plant Operator	0
		Blue - Basic Scaffolder	0
Gold - craft/supervisor card	18	Gold - Craft/Supervisor Card	17
		Gold - Advanced Scaffolder	0
Platinum - manager card	1	Platinum - Manager Card	0
Black - contracts manager card	5	Black - Senior Managers Card	0
Other	3	Other Professional cards, visitor cards, temporary cards	0
Unsure	4	Unsure	0
<i>Unweighted bases</i>	<i>440</i>		<i>6</i>

As expected, younger workers are more likely to hold Red Trainee cards (55% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue, Gold or Black cards (30%, 23% and 11% of 45+ year olds). Workers currently employed by an agency are more likely to hold Green cards (71%), compared with those employed directly (34%) or self-employed (29%).

Card colours also vary significantly according to current occupation/trade, as Figure 25 summarises. Some significant differences include that labourers/general operatives are most likely to hold Green cards (69%); and electricians (42%) and carpenters/joiners (35%) are most likely to hold Gold cards.



Figure 25: 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.	97	4	1	69	18	3	0	1
Plant / Mach. Op.	17	6	6	24	53	0	0	0
Carpenter / Joiner	46	15	0	24	17	35	0	2
Bricklayer	90	13	3	17	32	29	0	0
Dryliner*	12	0	0	42	50	0	0	0
Banksman / Banksperson*	4	0	0	50	50	0	0	0
Electrician	26	12	0	23	4	42	0	0
Roofer*	6	0	0	33	67	0	0	0
Painter / decorator*	12	8	0	25	67	0	0	0
Plasterer*	4	0	25	25	25	25	0	0
Plumber*	10	10	0	20	10	30	0	0
Scaffolder*	11	0	9	45	18	27	0	0
Site manager	34	0	3	15	0	26	6	44

Construction qualifications held

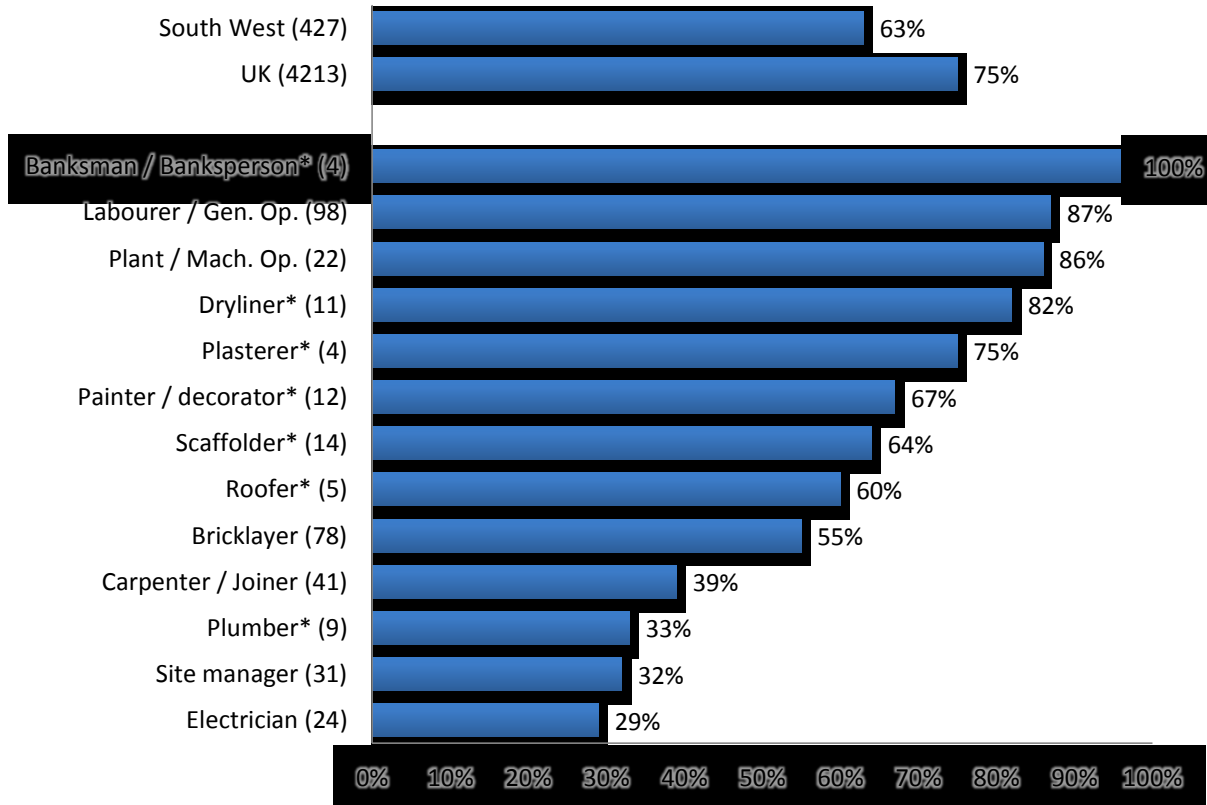
All workers were asked about the construction-specific qualifications they held after leaving full time education and started their first proper job in construction.

Overall more than three fifths of all construction workers in the South West say they had no formal qualifications related to construction when they first started working in the construction industry (63%) and the proportion is higher amongst workers aged 25 and over (58% of 25 to 44 year olds and 59% of 45+ year olds). By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst banksmen (100%*), labourers/general operatives (87%) and plant/machine operatives (86%), whilst electricians (29%), site managers (32%) and plumbers (33%*) are least likely to have started with no formal qualifications. (*Caution: Small sample base)



Figure 26: 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 quarters of South West construction workers reported holding some sort of construction related qualification at the time of interview (72% cf. 73% in 2012). Compared with the UK average, South West construction workers are more likely to hold some sort of construction related qualification (63% in 2015; 65% in 2012).

As Figure 27 summarises the proportion of workers that hold any qualifications is lower than average amongst those who have worked in construction for less than a year (54%) and workers employed by an agency (59%).



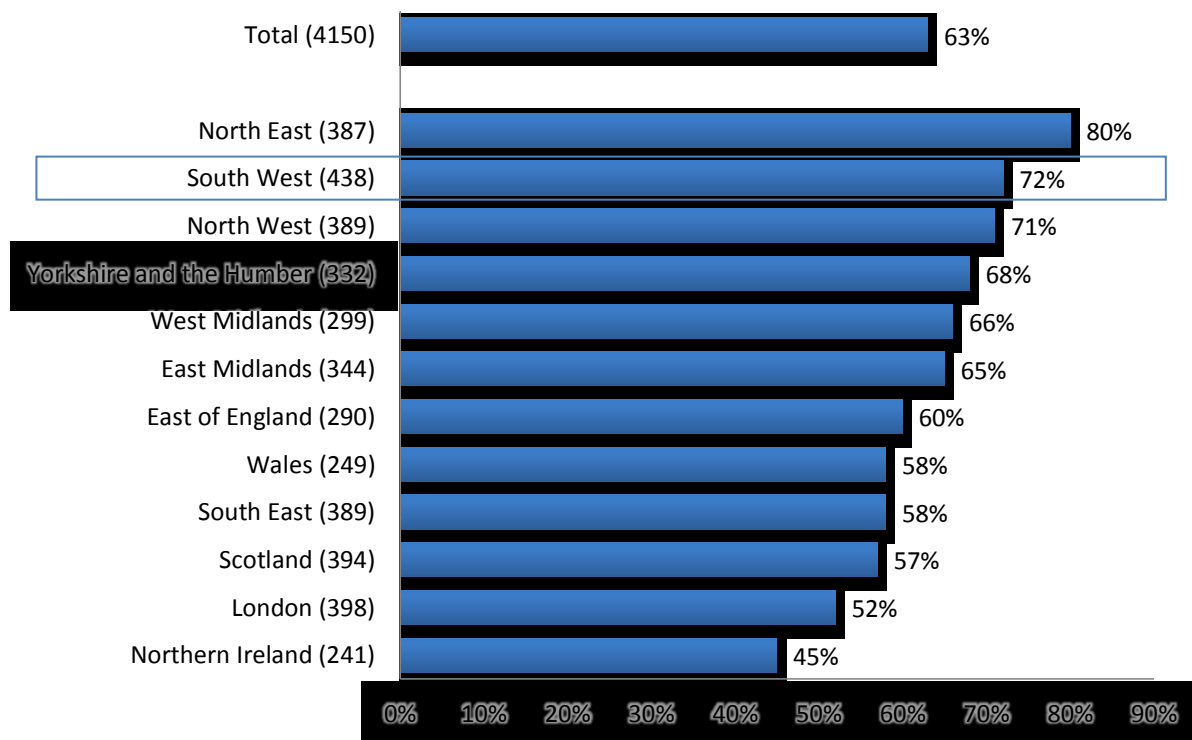
Figure 27: Proportion of workers that hold any construction-specific qualification
 Base: All respondents who provided a valid response

		SW 2015	SW 2012	SW 2007	UK 2015
		%	%	%	%
South West (438)		72	73	49	63
Age	16 to 19 years (39)	85	48	33	62
	20 to 24 years (63)	78	66	36	62
	25 to 44 years (200)	65	81	54	65
	45+ years (133)	77	65	54	61
Length of time in construction	<1 year (46)	54	56	9	35
	1 to 2 years (29)	62	45	26	50
	3 to 4 years (53)	75	65	42	54
	5+ years (308)	75	77	56	68
Current contract type	Employed directly (297)	73	72	43	65
	Self-employed (107)	74	75	60	61
	Agency (32)	59	71	0	46

Unweighted bases for 2015 South West in parentheses

Workers in the South West are the second most likely to hold any construction-specific qualifications, behind the North East (see Figure 28).

Figure 28: 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. Site managers (100%) are most likely to hold qualifications, followed by electricians (92%) and plumbers (91%*). Trades less likely to hold formal qualifications include those working as banksman/banksperson (33%*), roofers (40%*) and labourers/general operatives (47%). (*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 29 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 (62%), which is a lower proportion than in 2012 (71%) and the UK 2015 average (66%). Around 1 in 5 South West construction workers with qualifications hold City & Guilds qualifications (21% cf. 19% in 2012 and 20% across the UK in 2015). A further fifth (21%) of construction workers with qualifications in the South West now hold an apprenticeship, a significant increase since 2012 (1%) and more than the UK average of 13%.

Figure 29: Main type of qualification held

Base: Workers with qualifications who provided a valid response

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %
NVQ/SVQ	62	71	46	66
City & Guilds	21	19	42	20
Apprenticeship	21	1	3	13
HNC/HND/BTEC Higher	4	0	4	4
Degree	3	0	1	4
Other	16	2	N/A	11
<i>Unweighted bases</i>	<i>291</i>	<i>230</i>	<i>121</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.

One in eight construction workers in the South West believe they would benefit from some form of training in basic skills (12%), significantly fewer than in 2012 (28%). In terms of the type of training required, 7% would like training in maths, 4% in reading or speaking English and 3% in writing, as Figure 30 summarises.



Figure 30: Self-assessed need for training in basic skills

Base: All respondents

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %
ANY	12	28	18	14
Maths	7	17	10	6
Reading	4	16	8	6
Speaking English	4	12	5	7
Writing	3	14	7	6
<i>Unweighted bases</i>	<i>494</i>	<i>420</i>	<i>255</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 16-24 (22% cf. 3% aged 45+);
- Those who have worked in the industry for less than a year (26% cf. 9% among those with 5+ years experience);
- Carpenters/joiners (27%) and labourers/general operatives (17%).

The proportion that identified a need for more training in basic skills is broadly in line with the UK average (14%).

Current study for additional construction qualifications

Overall 15% of all construction workers in the South West are currently working towards any formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications). This is the same proportion as in 2012 and compares with a UK average of 12% in 2015.

As in 2012 the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (73% of 16 to 19 year olds) and amongst those who have worked within the construction industry for less than two years (45% amongst those with less than a years' experience, 50% amongst those with 1 to 2 years experience). Workers employed directly (21%) are also more likely than those who are self employed (4%) or employed through an agency (8%) to be currently working towards a qualification.

Of those who have no qualifications currently 1 in 9 are working towards one (11%).

Figure 31 summarises these findings.



Figure 31: Proportion working towards additional construction qualifications

Base: All respondents

		SW 2015	SW 2012	SW 2007	UK 2015
		%	%	%	%
Total (494)		15	15	16	12
Age	16 to 19 years (40)	73	78	50	57
	20 to 24 years (68)	25	27	29	23
	25 to 44 years (228)	11	9	11	10
	45+ years (155)	3			4
Length of time in construction	<1 year in construction (47)	45	50	23	31
	1 to 2 years (32)	50	64	26	28
	3 to 4 years (57)	28	38	67	23
	5+ years (356)	6	9	9	7
Contract type	Employed directly (329)	21	N/A	N/A	16
	Self-employed (127)	4	N/A	N/A	8
	Agency (36)	8	N/A	N/A	10
Highest qualification level	None (122)	11	N/A	N/A	11
	Level 1 (30)	47	N/A	N/A	32
	Level 2 (142)	22	N/A	N/A	15
	Level 3 (112)	12	N/A	N/A	8
	Level 4+ (32)	3	N/A	N/A	15

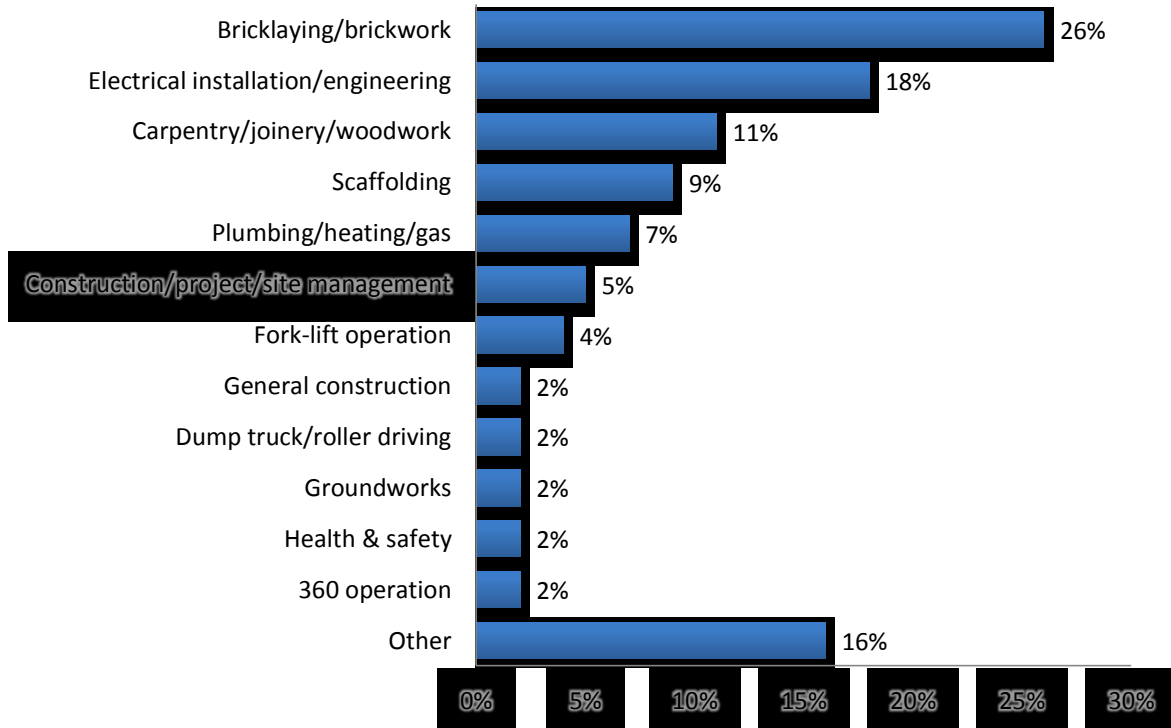
Unweighted bases for 2015 South West in parentheses

Of those who are currently studying for a qualification the most popular type of qualification is an NVQ/SVQ (81%). In terms of the subject of the qualifications being worked towards bricklaying (26%), followed by electrical installation/engineering (18%) are most popular, as Figure 32 illustrates.



Figure 32: Subject of qualification being worked towards

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



Unweighted base = 57

With regards to the level of qualification being worked towards (see Figure 33), qualifications equivalent to Level 2 (32%) and Level 3 (48%) are most popular, including amongst those with no qualifications currently (43% working towards each level).

Figure 33: Level of qualification being worked towards

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

	SW 2015 %	UK 2015 %
Level 1	6	6
Level 2	32	31
Level 3	48	35
Level 4+	6	11
Other	3	9
None	5	7
Unweighted bases	63	469



Supervisory and managerial qualifications and training

As reported earlier, a quarter of all construction workers in the South West perform a supervisory or management role at their site (25%). Amongst those who do not currently perform supervisory/management roles almost a quarter want to become a supervisor or manager in the future, but have not done it before (23%) and a further 6% want to be a supervisor/manager and have done it before. Nearly a quarter of all workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (23%), while just under half are certain that they do not want to be (47%).

Amongst workers aged 20 to 24, the proportion that would like to be supervisors/managers is highest (at 42%), while amongst those aged 45 and over a significantly higher proportion of workers definitely do not want to be supervisors/managers (72%). 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 55% 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 (34%) are more likely than those employed directly (24%) or self-employed (18%) to want to be a supervisor/manager, but have not done it before.



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

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

*caution: small sample base

		Unweighted bases	Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
South West		358	23	6	47	23
UK		3457	20	6	53	21
Age	16 to 19 years	39	36	0	33	31
	20 to 24 years	60	37	5	27	32
	25 to 44 years	164	23	7	44	26
	45+ years	92	9	9	72	11
Length of time in construction	<1 year	45	36	7	31	27
	1 to 2 years	30	37	3	40	20
	3 to 4 years	52	35	2	31	33
	5+ years	229	16	7	55	21
Contract type	Employed directly	224	24	5	46	25
	Self-employed	103	18	7	52	22
	Agency	29	34	7	38	21
Highest qualification level	No Qualifications	107	18	5	55	22
	Level 1	29	31	7	31	31
	Level 2	113	27	2	49	22
	Level 3	67	18	19	40	22
	Level 4+*	2	50	0	50	0

Just over a quarter of all construction workers in the South West (27%; 25% across the UK) and 7 in 10 of those who have had some form of supervisory or management responsibilities (71% cf. 67% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills.

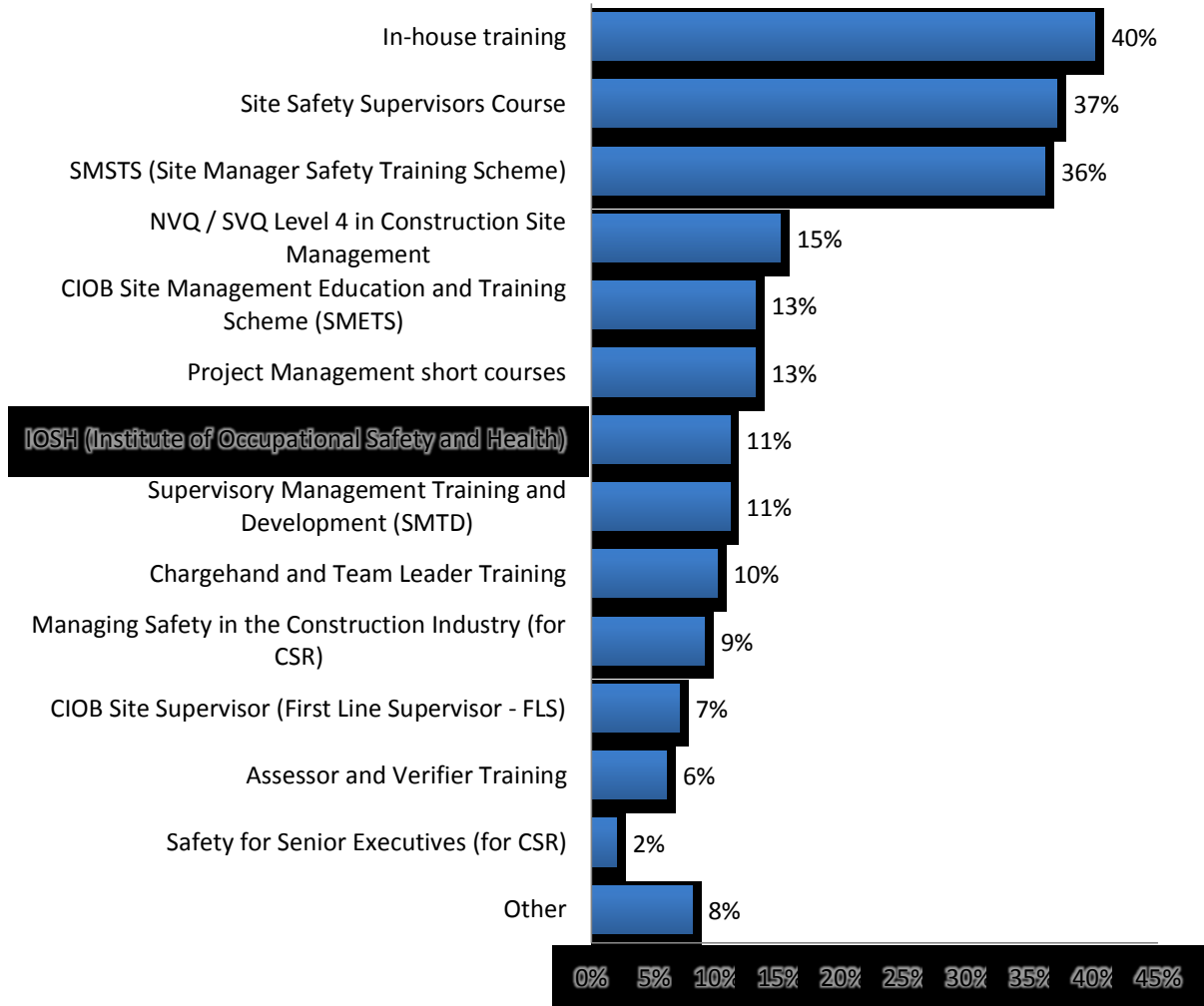
The proportion that has undertaken any managerial or supervisory training increases to roughly a third amongst workers aged 45 and over (36%), those that have worked in construction for 5+ years (32%) and those employed directly (30%). Virtually all site managers have received formal training designed to improve managerial or supervisory knowledge or skills (97%).

In terms of the types of supervisory/managerial training undertaken the proportions mentioning each type are summarised in Figure 35. In-house training is most frequently mentioned by those who have undertaken any training (40%), followed by Site Safety Supervisors Courses (37%) and SMSTS (36%).



Figure 35: Types of managerial/supervisory training undertaken

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



Unweighted base = 131

Overall skill levels

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

As in 2012 the vast majority of construction workers in the South West (99%) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

Just under a quarter of the workforce (23%) holds a skill card/certificate, but have no other construction qualification, this is lower than in 2012; however is more consistent with findings from 2007 (42% and 31% respectively).



Figure 36: Qualification status summary

Base: All respondents

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	99	98	82	98
Holds a formal construction qualification or a skills card/certificate	98	98	78	97
Holds a skills card/certificate	96	97	70	96
Holds a skills card/certification but no other qualification	23	42	31	30
Working towards a qualification	15	15	16	12
<i>Unweighted bases</i>	<i>494</i>	<i>420</i>	<i>255</i>	<i>4771</i>

Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. Figure 37 summarises all construction workers' highest level of qualification, overall and by occupation.

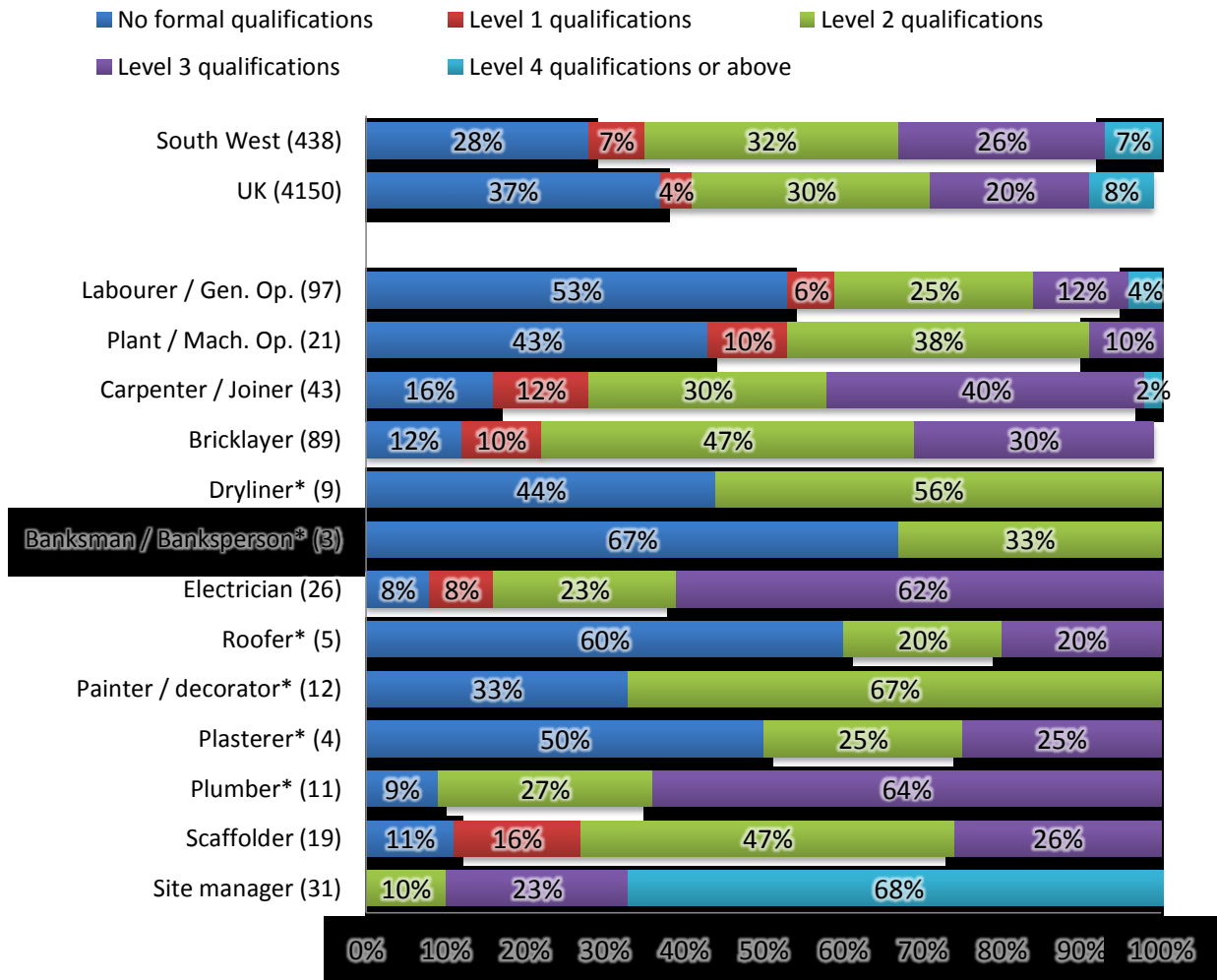
Overall while nearly 3 in 10 construction workers in the South West (28% cf. 27% in 2012 and a 2015 UK average of 37%) have no qualifications, the majority have qualifications equivalent to Level 2 or above (65% cf. 63% in 2012; 58% across the UK in 2015).

By occupation site managers are most likely to hold the highest level of qualifications; two thirds hold qualifications at Level 4 or above (68%) and a further 23% have Level 3 qualifications. Electricians and plumbers are also more likely than other occupations to hold qualifications equivalent to Level 3 or above (62% and 64%*, respectively). (*Caution: Small sample base)



Figure 37: Current qualification level, by occupation

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

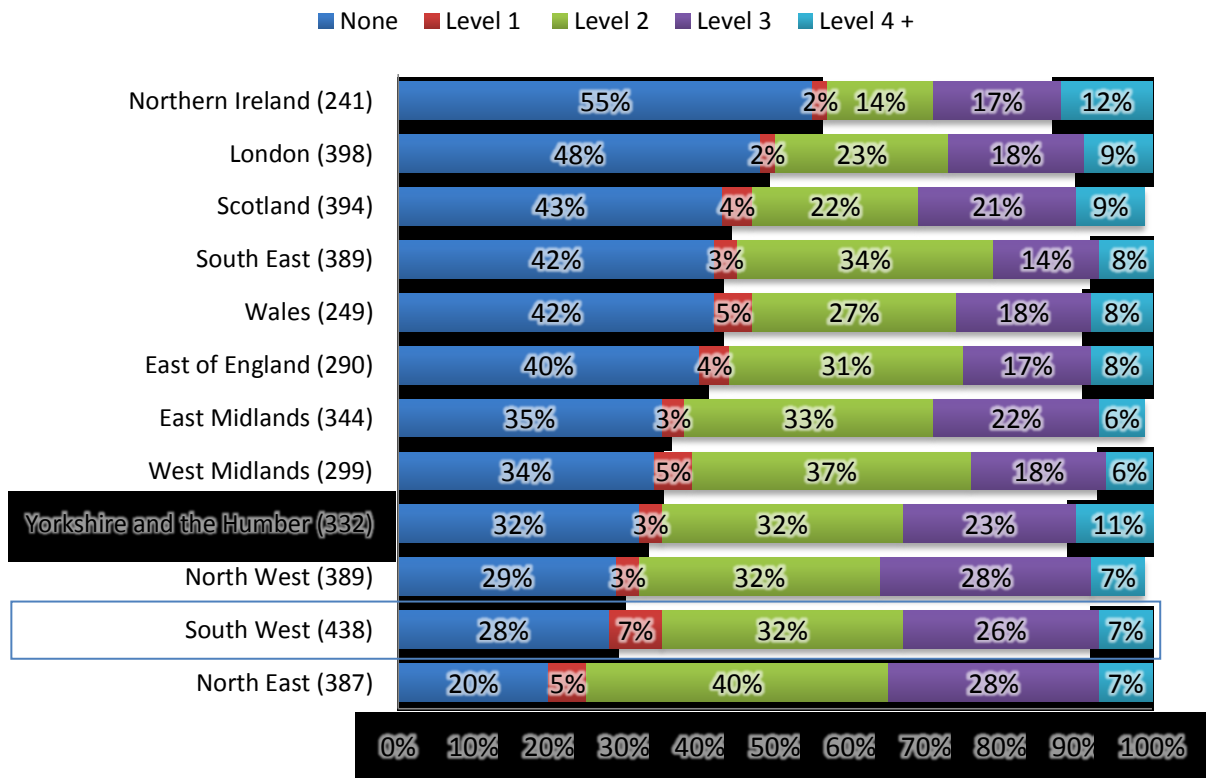


Unweighted bases in parentheses

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 38, which highlights that the construction workforce in the South West is amongst the best qualified in the UK.



Figure 38: Current qualification level, by region/nation
 Base: All respondents who provided a valid response



Unweighted bases in parentheses

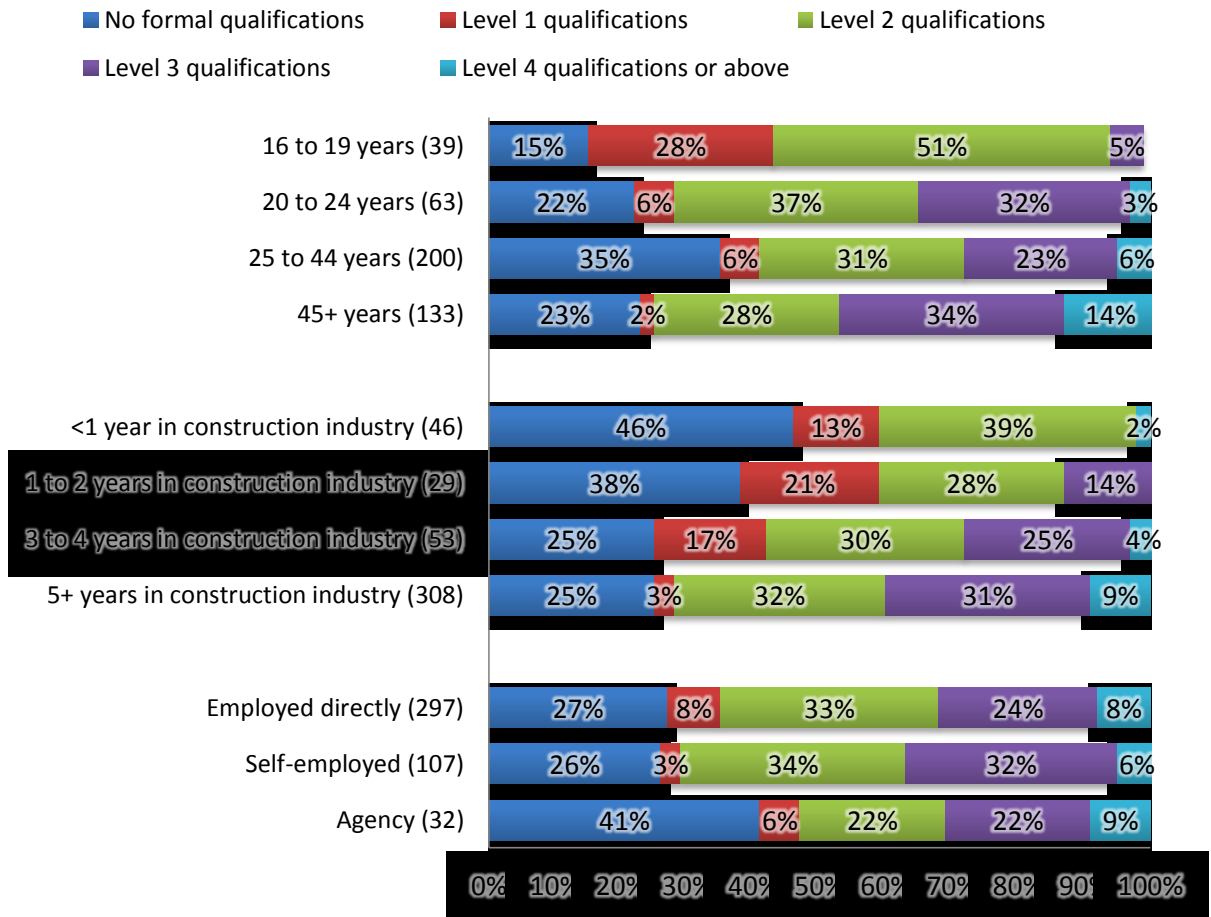
Looking at other sub-groups of construction workers, younger workers are most likely to have qualifications at either Level 1 or 2 (79% of 16-19 year olds) and workers aged 45+ are most likely to have qualifications at Level 3 or 4+ (48%). A similar pattern is evident in terms of length of time in the 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+ (40% cf. 2% among those with less than a year's 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 any qualifications (41% have none).

Figure 39 illustrates these variances.



Figure 39: Current qualification level, by other key variables
 Base: All respondents who provided a valid response



Unweighted bases in parentheses

Geographic mobility

This section of the report on geographic mobility helps to identify which areas 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 area that they are currently working in, although the code frame used for the responses was slightly different. Within the South West the most likely reason for working in region/nation is because they grew up there/have always lived there (64%), with a further 9% mentioning other reasons to do with their family. Overall family reasons are mentioned to a greater degree than in 2012 (73% cf. 63%).

The next most likely reason for working at their current location is that their employer sent them there (22% cf. 17% in 2012).

Figure 40: Reasons for choosing to work in current location

Base: All respondents

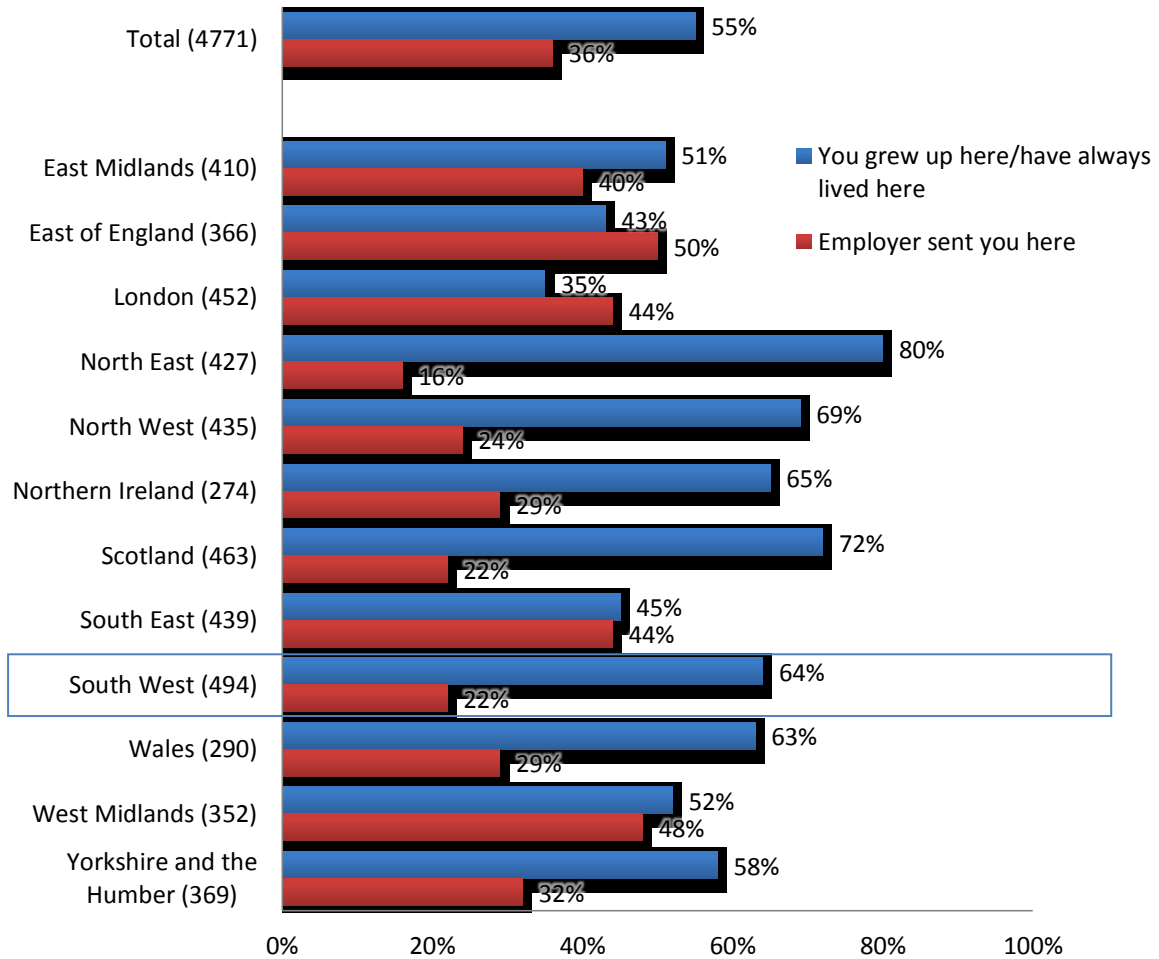
	SW 2015 %	UK 2015 %		SW 2012 %
You grew up here/have always lived here	64	55	Family	63
Family reasons	9	6		
Employer sent you here	22	36	Employer sent me	17
Came to the area to take up this or another job	4	5	More regular opportunities	6
There are more jobs available in this area	3	6	More jobs here	6
Construction work is better paid in this area	4	3	Better paid jobs	4
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	3	1	Prefer living here	17
<i>Unweighted bases</i>	<i>494</i>	<i>4771</i>		<i>407</i>

Younger workers aged 16-19 (30%) are more likely than those aged 45 and over (12%) to say that they work there 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 the South West are more likely than the UK average to cite having always lived there and less likely to say their employer sent them.



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



Unweighted bases in parentheses

Half of all workers have worked within the South West for their entire construction career (50% cf. 48% in 2012). With a further 33% that have remained in this region most of the time, this means the majority of all workers have remained in the current region for all or most of the time (83%).

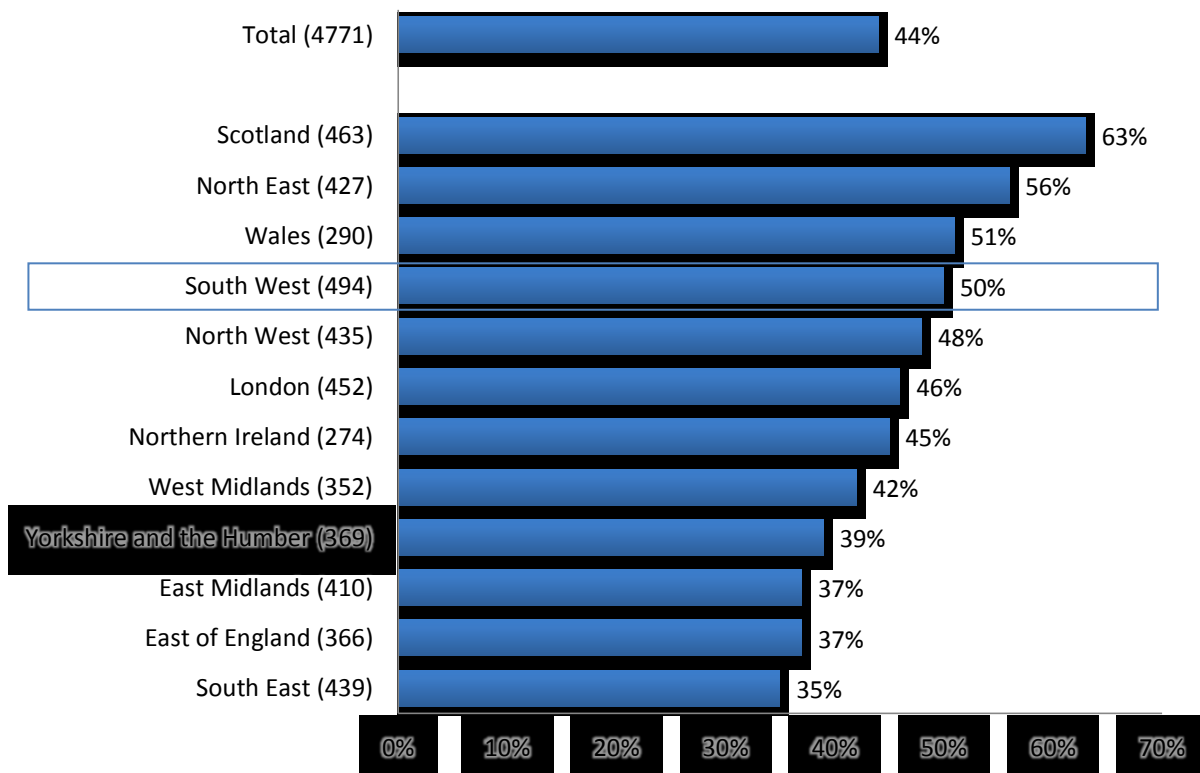


Figure 42: Proportion of construction workers' career worked in current region/nation
Base: All respondents

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %
All of your time	50	48	36	44
Most of it	33	34	40	36
Around half your time	7	9	8	8
A small proportion of your time	6	6	13	7
Only on this job (this is the first site you've been to in this region)	3	1	3	3
Don't know	2	1	<0.5	2
<i>Unweighted bases</i>	<i>494</i>	<i>420</i>	<i>255</i>	<i>4771</i>

The proportion of construction workers in the South West that have spent all of their time in the region is higher amongst younger workers (73% of 16 to 19 year olds and 63% of 20 to 24 year olds) and also higher amongst those that have worked in the construction industry for less than 5 years. There are quite significant variations again by region/nation; the South West has a higher proportion of workers that have spent all their time in the region compared to the UK average (44%), and is similar to Wales (51%) and the North West (48%) in this respect.

Figure 43: 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 44. The proportion for which this is the case is 83% in the South West.

Figure 44: Region/nation employer operates in, compared with region/nation working in currently

Base: All respondents

*denotes less than 0.5%

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

Region/nation worked in before current site

Thinking about the last construction site they worked on, before this one, in the majority of cases workers' last site is in the same region/nation as they are working in now, however the extent to which this is the case varies considerably by region/nation, as Figure 45 illustrates. Three quarters of construction workers in the South West state that their last site was in the South West (76%); the region/nation is most similar to London (77%) and the West Midlands (75%) in this respect.



Figure 45: 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 three quarters of all construction workers in the South West were interviewed in the same region in which they were living in when they started their construction career (76%). There are considerable variations in the extent to which workers have remained in their original locality, as Figure 46 summarises.



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

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

Original home	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	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 47 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that once again there are great variations by region/nation. Three quarters of construction workers in the South West gained their first construction qualification there (76%), a similar proportion to the West Midlands (79%).



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

Base: Those with a formal qualification

	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.

One in seven construction workers in the South West are travelling into the region for work from another region/nation in which their current residence is based (15%), slightly fewer than in 2012 (18%).



Figure 48: 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.

More than four fifths of South West construction workers currently live in the region (85%), a similar proportion to the North West (88%) and Yorkshire and the Humber (86%).



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

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

Region/nation of current residence	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	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

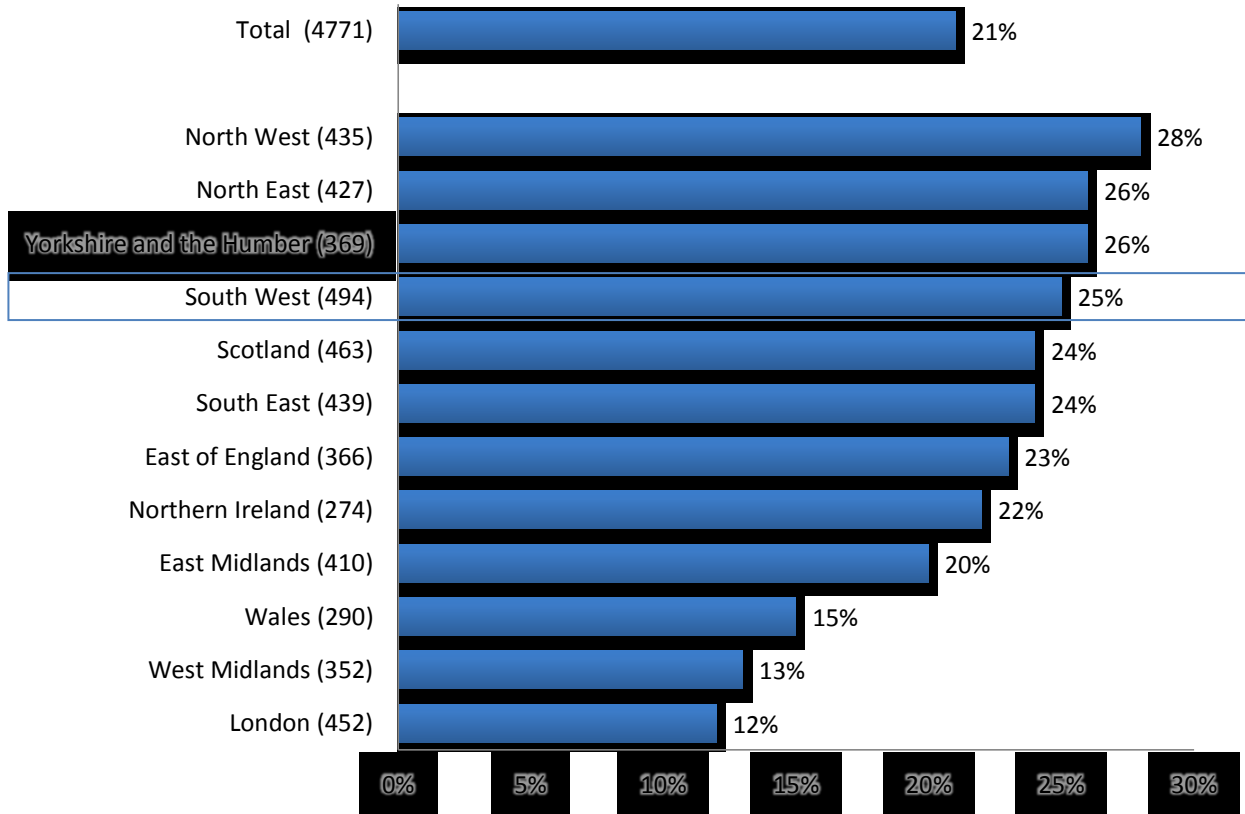
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within the South West, approximately 1 in 6 construction workers have worked no more than 20 miles away (16%) and a further third have worked between 21 and 50 miles away (31%). This leaves half that have worked more than 50 miles away from their permanent home (51%), with a quarter that have worked between 51 and 100 miles away (26%) and a quarter that have worked more than 100 miles away (25%).

Once again there are variations in this regard, with workers based in the South West amongst those most likely to have travelled more than 100 miles from their permanent home to work in the last 12 months.



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

Base: All respondents



Unweighted bases in parentheses

Use of temporary accommodation

Nationally, 1 in 20 (6%: as in 2012) construction workers reported that they were currently staying in temporary accommodation while working at their site. In the South West, 7% of workers are currently staying in temporary accommodation, an increase since 2012 (3%).



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

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

Journey distance to work

Within the South West, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 24.1 miles which is slightly less than the average of 26 miles reported in 2012. This compares to an average of 21.9 miles across the UK.

Nearly two fifths (39%) travelled less than 10 miles from their current residence to the site they work, whilst 20% travelled between 10 and 19 miles, 30% travelled between 20 and 49 miles, 8% travelled between 50 and 99 miles and 3% travelled more than 100 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (18% of all construction workers in the South West) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 4% expect to work for another week or so, or less; 8% expect another month; 16% about 3 months; 30% between 6 months and a year and 10% expect to still be working for their current company/agency in more than a year's time. Around a third of all temporary workers in the region did not know how much longer they could expect to be working for their current company/agency (31%).

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.



A quarter of all construction workers in the South West (24% cf. 23% in 2012) do not expect to work on that site for more than a month, including 6% that only expect to be there for about a week or less. A further quarter anticipated being on site for more than a month, but less than a year (24%), compared with a significantly higher proportion in 2012 (40%). Another quarter expect to stay on that site for a year or longer (27%), which is a significant increase compared with 2012 (17%), suggesting more stable employment than in 2012. However in the remaining quarter of cases (24%) 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 (35% don't know).

Amongst the various trades/job roles, site managers and scaffolders are most likely to indicate that they expect to work at that site for more than a year (46% and 40%, respectively).

Expected next site location

Almost three quarters of all construction workers in the South West are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis (73% cf. 72% in 2012). The remaining quarter of workers are sure that this will not be the case (3%); that it depends where the work is (18%); or that they don't know (6%).

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. Again, construction workers in the South West that do not expect to be able to commute daily to their next job are amongst those most likely to expect to remain in the region for their next job.



Figure 52: Expected location of next site/job

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

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

Sub-sector and sector mobility

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

Sub-sector mobility

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

Compared with 2012 there has been an increase in the proportion of construction workers that have been working on new housing within the South West; up from 76% to 83%. For all other types of projects the proportion of construction workers that have worked on them has fallen since 2012; public non-housing from 52% to 33%; private industrial work from 48% to 30%; commercial work from 51% to 34%; infrastructure projects from 35% to 23%; housing repair from 46% to 36%.

Overall nearly half of all construction workers have only worked on one project type (47%), compared with closer to a quarter in 2012 (28%), which again suggests a pattern of increased stability in the sector.



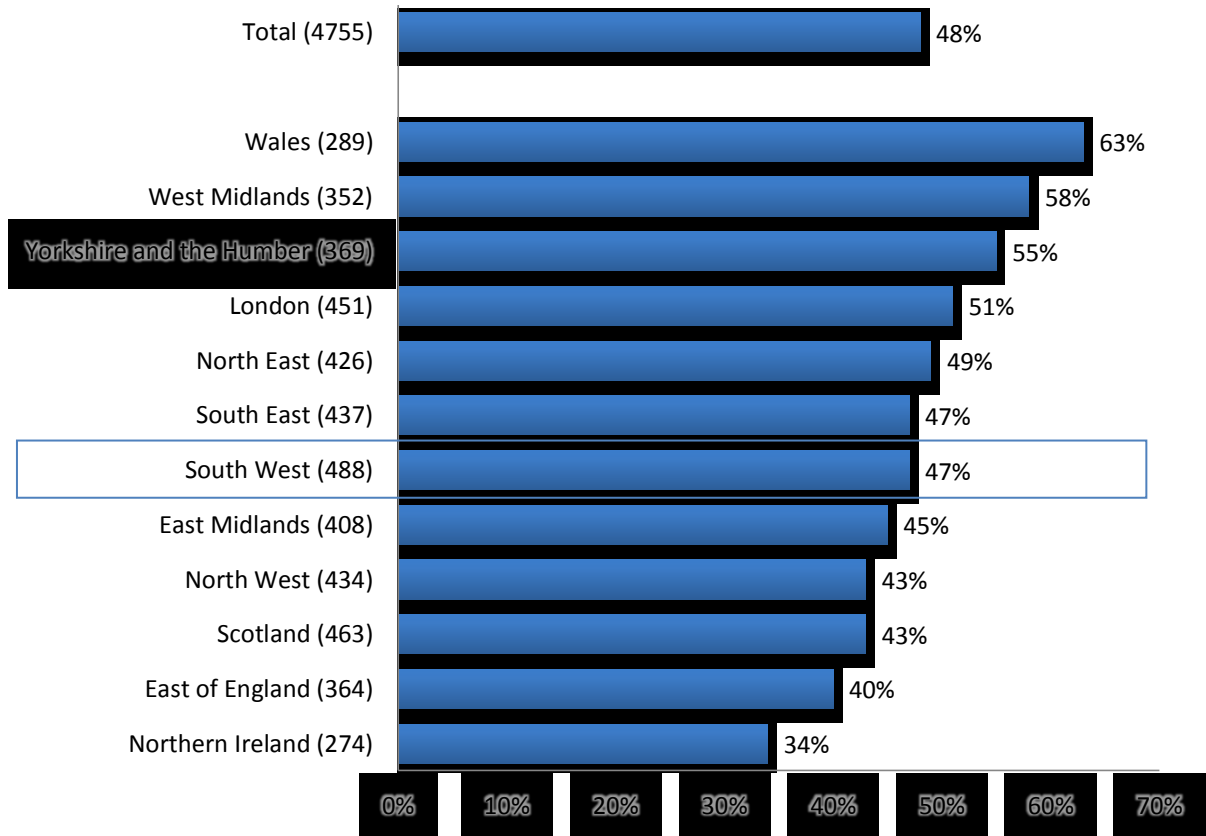
Figure 53: Type of projects spent significant periods on
Base: All respondents

	SW 2015 %	SW 2012 %	SW 2007 %	UK 2015 %
New housing	83	76	81	83
Housing repair and maintenance including extensions/loft conversions	36	46	42	36
Commercial work such as shops, office, pubs etc	34	51	49	35
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	30	48	49	30
Public non-housing work such as schools, sports facilities, landscaping	33	52	55	33
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	23	35	22	21
ONE TYPE ONLY	47	28	23	48
TWO TYPES	15	16	18	14
THREE TYPES	11	15	22	11
FOUR TYPES	8	13	16	8
FIVE TYPES	8	13	15	9
SIX TYPES	10	15	5	9
<i>Unweighted bases</i>	<i>494</i>	<i>420</i>	<i>255</i>	<i>4771</i>

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



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



Unweighted bases in parentheses

The likelihood that workers have worked only on one project type declines, as age increases, as one would expect (from 88% of 16 to 19 year olds to 32% of 45+ year olds). By current trade/occupation, dryliners (58%*), bricklayers (57%), plumbers (55%*), carpenters/joiners (54%) and labourers/general operatives (53%) are most likely to have only worked on one project type, while plasterers (0%*), painter/decorators (25%*) and electricians (26%) are least likely. (*Caution: Small sample base)



Figure 55: 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*	4	50	25	0	0	0	25
Dryliner*	12	58	0	8	17	0	17
Labourer / Gen. Op.	104	53	13	13	12	3	6
Scaffolder	20	40	30	0	5	5	20
Plasterer*	4	0	25	0	0	50	25
Bricklayer	101	57	20	9	2	7	4
Plumber*	11	55	9	9	9	18	0
Plant / Mach. Op.	24	46	17	17	8	4	8
Carpenter / Joiner	46	54	7	4	4	17	13
Roofer*	6	33	33	17	0	17	0
Painter / decorator*	12	25	0	17	8	33	17
Site manager	35	43	9	14	6	11	17
Electrician	31	26	6	16	16	10	26

Leaving the sector

In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years time they will still want to be working in construction. Within the South West, almost half of the construction workers say they definitely will be (48%); a further 38% think it is very or quite likely; 5% consider it unlikely; just 2% say they definitely won't be and a further 3% hope to be retired by then, while 4% 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): 49% believe they will definitely want to be working in the construction sector, 25% believe it is very likely they will want to be working in the construction sector and 14% believe it is quite likely they will want to be working in the construction sector. Only 8% think on any level that they will not want to be working in the construction sector in 5 years time which is less than in 2012 (13%).



The South West construction workforce 2014-15 summary

Across the wide range of issues covered within the 2015 survey it seems there are a number of signs of increased stability amongst the UK construction workforce and this is reflected in the South West. Since 2012 there has been an increase in the proportion of workers employed directly by companies (from 53% to 67%) and a corresponding decrease in the proportion that are self-employed (from 41% to 26%). The proportion of workers employed directly in the South West is significantly higher than the UK average (67% cf. 54%), and there are fewer workers employed on a temporary rather than a permanent basis (18% cf. 23% across the UK).

There has also been an increase in the proportion of South West construction workers that expect to stay on the site they are currently working on for a year or longer (from 17% to 27%).

In terms of project type there has also been increased stability, with almost half of all construction workers in the South West that have worked on just one project type (47%), compared with closer to a quarter in 2012 (28%). The proportion of workers that have worked on new housing is also up, from 76% to 83%, which reflects more confidence in the sector.

Some uncertainty does however remain with around a third of temporary workers not knowing how much longer they can expect to be working for their current employer/agency (31%) and around a quarter of all workers not knowing how much longer they can expect to be on their current site (24%).

In terms of skills and qualifications it is encouraging to note that virtually all workers continue to hold some form of skill card or certificate, with the proportion in the South West being on a par with the UK average (both 96%).

Nearly three quarters of all construction workers in the South West (72%) hold some form of qualifications and this proportion is significantly higher than the UK average (63%). In particular, there has been a significant increase in the proportion of workers with Apprenticeships since 2012 (from 1% to 21% cf. 13% across the UK in 2015). Around two thirds of all construction workers in the South West hold qualifications equivalent to Level 2 or above (65%) and the region is above the national average in this respect (58%).

Overall 15% of South West construction workers are currently working towards a qualification. One in eight (12%) believe they would benefit from training in basic skills, which is a significantly lower proportion than in 2012 (28%).

In terms of mobility, half of construction workers have worked within the South West for their entire construction career (50% cf. 44% UK average) and almost three quarters of workers in the South West 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 (73%); compared with workers in other regions, those in the South West are amongst the most confident in this respect.



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