

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

Wales Report - April 2019





Study prepared by BMG Research from a commission by CITB.

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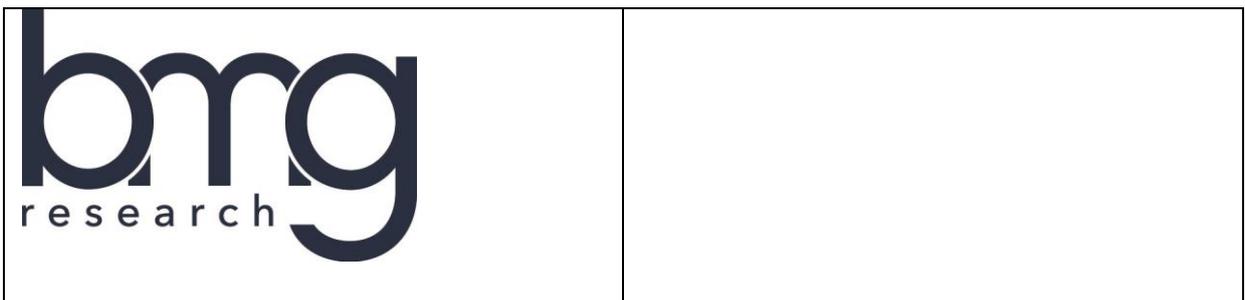
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## Executive summary

### Introduction

- CITB commissioned BMG Research to undertake the 2018/19 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 4048 construction workers undertaking manual roles on sites across the UK and 287 interviews were conducted with construction workers in Wales

### Profile of the sample

- All but 1% of construction workers are male. More than half the construction workers interviewed in Wales are aged under 35 (45%), which is a higher proportion than the UK population as a whole (36%), but similar to the UK average in the survey (45%). Just 5% of construction workers are aged 60 or over.
- Overall, 2% of the construction workforce in Wales is of BME ethnic origin, compared with 5% in the Wales population as a whole. The UK average in the survey is 6% (compared with 15% of the UK population as a whole).
- By trade/occupation, the highest proportion of the Wales sample is accounted for by labourers/general operatives (21%), followed by bricklayers (15%), carpenters/joiners (13%) and plant and machine operatives (12%). The upward trend in bricklayers continues from 2007 in Wales (increasing from 8% in 2007 to 10% in 2012, 13% in 2015 to 15% in 2018/19).
- A fifth of all those interviewed in Wales perform a supervisory or management role on their site (20%); a slightly lower proportion than in 2015 (22%) and lower than the UK average in 2018/19 (30%).
- Half of construction workers interviewed for the survey in Wales are employed directly by a company (50%), which is a similar proportion to the UK average (of 49%). Two-fifths of workers in Wales are self-employed (40%) and this is a slightly lower proportion than the UK average (of 43%). Since 2015 there has been a decrease in the proportion that are directly employed (from 66% in 2015) and an increase in the proportion that are self-employed (from 27% in 2015). Just 8% of construction workers in Wales work for an agency, which compares with 7% nationally and 6% within Wales in 2015.
- The likelihood of being directly employed increases with time spent working in construction, from 41% of those that have worked in construction for less than a year to 51% of those that have been working in the industry for 5+ years.
- One in four of all construction workers in Wales (26%) are employed on a temporary rather than permanent basis. This is similar to the UK average (28%). By occupation the proportion is highest amongst bricklayers (40%) and lowest amongst site managers (12%).
- Two-thirds of construction workers in Wales work between 40 and 49 hours per week (68%), which is a higher proportion than the UK average (60%), and 1 in 8 works more than 50 hours per week (13%), which is lower than the UK average (23%).



## Work history

### Time in the sector

- Two-fifths of all construction workers in Wales have worked in the industry for at least 20 years (39%), which compares with a lower UK average (32%). Around three-fifths have done so for 10+ years (59%).
- Seven in ten construction workers in Wales have only ever worked within the construction industry (70%), an increase on 2015 (63%), and higher than the UK average in 2018/19 (67%). Almost three-fifths of construction workers in Wales (59%) have worked pretty much continuously, without spells out of work and this is a higher proportion than that across the UK (56%).

### Previous non-construction jobs

- The 1 in 5 construction workers in Wales (19% of all respondents) that worked in another sector before starting work in construction are most likely to have worked in the wholesale and retail/repair of motor vehicles sector (37%), followed by manufacturing (35%).
- In terms of the job roles that construction workers previously held in other sectors, the highest proportion worked in skilled trades occupations (31%), followed by managerial occupations (24%).

### Occupational switching within the construction sector

- Three in ten construction workers in Wales (29%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is lower than in 2015 (35%) and compared to the UK average in 2018/19 (36%). All workers with Level 4+ qualifications have had more than one role or occupation within the construction sector and those in a supervisory or management role (46%) are more likely than average to have had more than one construction role.
- Workers are most likely to have previously worked as a labourer/general operative (35%) with just over 1 in 5 having previously worked as a carpenter/joiner (22%).
- Thinking about their future plans in the construction sector, 8 in 10 construction workers in Wales would like to carry on in the same trade or occupation (80%), while just over 1 in 20 would like to change their trade/occupation (7%) and just 2% would like to leave construction altogether. The proportion that wants to carry on as they are in Wales is the same as the UK average.
- The most popular occupation to which construction workers in Wales would like to change is site manager (45% of those who would like to change).
- Nine in ten construction workers in Wales that would like to change trade/occupation (90%) believe they will require further training or qualifications in order to do so. This is similar to the UK average (87%).
- The main reason for wanting to change trade/occupation is the belief that workers will be better paid (75%), followed by workers wanting more interesting work or being bored with



what they are currently doing, wanting the opportunity to use their skills/abilities better, and wanting more responsibility (each mentioned by 40%).

## Qualifications and skills

### Skills cards/certificates

- Most construction workers in Wales, as across the UK as a whole, hold some form of construction skill card or certificate (92% cf. 92% in 2015 and 2012 and a UK average in 2018/19 of 97%).
- Younger workers (82% of 16-19 year olds and 89% of 20-24 years) and those who have worked in construction for less than a year (82%) remain less likely to hold a skill card/certificate.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (83% in Wales; 85% across the UK).
- Card colours vary by age and particularly by occupation; younger workers are more likely to hold Red Trainee cards (31% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue cards (33% of 45+ year olds); labourers/general operatives are most likely to hold Green cards (69%); and plant and machine operatives (63%) are most likely to hold Blue cards.

### Construction-specific qualifications

- Seventy per cent of construction workers in Wales say they had no formal qualifications when they first started working in the construction industry. This is similar to the UK average (72%).
- By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (86%) and lowest among bricklayers (47%).
- Compared with 3 in 10 construction workers in Wales that had qualifications when they first started working in construction (30%), 7 in 10 construction workers in Wales reported holding some sort of construction related qualification at the time of interview (69%, compared with 58% in 2015 and 70% in 2012 and a UK average in 2018/19 of 72%).
- Within Wales, the proportion of workers that currently hold any qualifications is lower than average amongst workers who have worked in construction for less than a year (32%), while only two-fifths of the youngest age group hold qualifications (41% of 16-19 year olds\*). \* caution: small sample base
- By trade/occupation, proportions vary from the majority of bricklayers (95%), site managers (92%) and carpenters/joiners (92%) to just around a third of labourers/general operatives (36%).
- The qualifications most likely to be held by construction workers in Wales are NVQ/SVQ qualifications (65% of those with qualifications) while 1 in 5 construction workers in Wales with qualifications hold City & Guilds qualifications (20%). Just 4% of construction workers with qualifications now hold an apprenticeship.



### Basic skill needs

- One in ten construction workers in Wales believe they would benefit from some form of training in basic skills (10%), which is a lower proportion than in previous years (18% in 2015 and 15% in 2012) and similar to the UK average in 2018/19 (11%).
- In terms of the type of training required there is an almost even split across reading (3%) and writing (4%) while fewer feel they require training in speaking English (1%) and a higher proportion feeling they need more training in Maths (8%).

### Current study for qualifications

- One in nine construction workers in Wales are currently working towards formal qualifications relevant to the construction industry (11% cf. 12% in 2015, 13% in 2012 and a UK average in 2018/19 of 15%). This proportion is higher amongst 16-19 year olds (53%) and amongst those who have worked within the construction industry for less than a year (32%).
- Amongst workers with no qualifications, 10% are currently working towards a qualification but the proportion is higher amongst those with a Level 1 qualification (44%).

### Supervisory/managerial training

- Of those not currently performing a supervisory/management role, more than three-fifths are certain that they would not like to do so (59%), a higher proportion than across the UK (51%), while 1 in 6 would like to do so (19%) and a fifth are unsure (22%).
- One in four construction workers in Wales (25%) and just over three-quarters of those who have had some form of supervisory or management responsibilities (77% cf. 84% in 2015 and 50% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions are lower than the UK averages (34% and 81% respectively).
- SMSTS (Site Manager Safety Training Scheme) is more frequently mentioned as the type of training received (50%), followed by Site Safety Supervisors Courses (29%) and in-house training (19%).

### Overall skill levels

- The vast majority of construction workers in Wales (95%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 5% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. A quarter of construction workers in Wales (24%) hold a skill card/certificate, but have no other construction qualification. This is similar to the UK average of 22%.
- Overall, more than half of construction workers in Wales that provided a response have qualifications equivalent to Level 2 or above (54% cf. 53% in 2015 and 59% across the UK in 2018/19); just over a quarter hold qualifications equivalent to Level 3 or above (27%) and this is the same as the UK average.



## Geographic mobility

### Work history in the region/nation

- The fact that they grew up there/have always lived there (57%) is the most frequently cited reason among construction workers in Wales for working there. Two-fifths of construction workers in Wales (40%) reported that their employer sent them there and this is a higher proportion than in 2015 (29%) which reflects the UK-wide picture.
- In 2018/19 compared with 2015, a higher proportion of construction workers in Wales have worked within their current nation for their entire construction career (60% cf. 51% in 2015 and 40% in 2012) and the majority of construction workers in the nation have remained in Wales for all or most of their career (89%). This is higher than the UK average of 77%.
- Around 9 in 10 construction workers in Wales (88%) were also based in the nation for their last job and this proportion is higher than in 2015 (83%).

### Worker origins

- Overall, the vast majority of construction workers in Wales were interviewed in the same nation they were living in when they started their construction career (93% cf. 94% in 2015). There are considerable variations in the extent to which workers have remained in their original locality, with the proportion being highest in Scotland (96%) and Northern Ireland (95%) and lowest in the East of England (44%).
- More than four-fifths of construction workers in Wales (86%) have remained in the same nation in which they did their first qualification/training. Compared with other regions/nations, this is towards the top of the range with the highest proportion by region/nation within Scotland (96%) and the lowest within the South East (41%).

### Travel to site

- A third of construction workers in Wales have travelled at least 50 miles from their permanent/current home to work in the last 12 months (32%). Across the regions/nations, construction workers in Wales are the least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (11%).
- Overall, just 3% of construction workers in Wales (4% in 2015) are currently staying in temporary accommodation while working at their site. This proportion is slightly lower than the UK average (5%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 16 miles (18 miles is the UK average) and is the same as that reported in Wales in 2015.

### Site duration and change

- Half of the temporary workers in Wales (49%) do not know how much longer they can expect to be working for their current company/agency. This compares with a UK average of 38%.



- When all respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase, just over 1 in 20 expect to stay on that site for a year or longer (7% cf. UK average of 18%), which is a significant decrease compared with 2015 (38%) and 2012 (16%). However, in more than a quarter of cases (28% cf. 20% in 2015) workers do not know how much longer they can expect to be on site, indicating an increase in the degree of uncertainty in the last 3-4 years.
- More than three-quarters of all construction workers in Wales are confident that, when they finish their current job, their next job will allow them to travel to work from their permanent home on a daily basis (77% cf. 71% in 2015 and 74% in 2012). This is a lower proportion than the UK average in 2018/19 (84%). The remaining quarter say it depends/they don't know or that they won't be able to commute.

## **Sub-sector and sector mobility**

### **Sub-sector mobility**

- As in 2015 the vast majority of construction workers in Wales have worked on new housing (82% cf. 86% in 2015 and 81% in 2012). For all other types of projects, the proportion of construction workers that have worked on them has increased since 2015.
- Overall, 3 in 10 construction workers in Wales have only worked on one project type (29%), which is a lower proportion than in 2015 (63%) and similar to the UK average (30%).

### **Leaving the sector**

- In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Amongst construction workers of all ages in Wales, half say they definitely will be (51% cf. UK average of 48%); a further third think it is very or quite likely (31%); 6% consider it unlikely; just 1% say they definitely won't be and a further 2% hope to be retired by then, while 9% don't know.



## Introduction

### Aims and objectives

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

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

The specific objectives of this research project were to:

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

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

### Method

The 2018/19 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2015. Overall, 4048 interviews with construction workers in manual roles across the UK were completed, split between the 12 standard regions/nations. In total, 287 interviews were conducted in Wales.



## Sampling

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

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

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

Project eligibility criteria:

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

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

## Telephone-based site recruitment

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

## Site visits

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



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

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

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

**Figure 1: Interviews and weights by region/nation**

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

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

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

### Notes on reading this report

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

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

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



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

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.

Wales is referred to by the abbreviation 'WA' in tables.

## Profile of construction site workers

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

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

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

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



## Personal demographics

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

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

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

|                         | <b>WA 2018/19</b> | <b>UK 2018/19</b> |                   | <b>UK Workforce<sup>#</sup></b> |
|-------------------------|-------------------|-------------------|-------------------|---------------------------------|
|                         | <b>%</b>          | <b>%</b>          |                   | <b>%</b>                        |
| Male                    | 99                | 98                | Male              | 53                              |
| Female                  | 1                 | 1                 | Female            | 47                              |
| Transgender             | 0                 | <0.5              | Transgender       | -                               |
| Non-binary              | 0                 | <0.5              | Non-binary        | -                               |
| Prefer not to say       | <0.5              | <0.5              | Prefer not to say | -                               |
| <i>Unweighted bases</i> | <i>287</i>        | <i>4048</i>       |                   | <i>32,277,500</i>               |

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



Within Wales, the youngest age group (16 to 24 year olds) account for a under a fifth of construction workers (18%), a smaller proportion than in 2015 (22%) and 2012 (21%). Compared with 2015 there are similar proportions of workers aged 25 to 34 years (27% cf. 25%), and aged 35 to 44 (22% cf. 20%). There are slightly fewer 45 to 54 year olds among Wales construction workers compared with 2015 (21% cf. 24%) while the proportion of workers aged 55 and over is similar (9% in 2018/19 cf. 9% in 2015). Workers aged 60 and over account for just 5% of construction workers.

Compared with the UK construction workforce overall there is a similar proportion of construction workers aged under 35 years within Wales (45% in Wales; 45% across the UK cf. 36% of economically active adults across the UK).

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

*Base: All respondents*

|                             | WA<br>2018/19<br>% | WA 2015<br>% | WA<br>2012<br>% | WA<br>2007<br>% | UK<br>2018/19<br>% |                | UK<br>Workforce*<br>% |
|-----------------------------|--------------------|--------------|-----------------|-----------------|--------------------|----------------|-----------------------|
| 16 to 19 years              | 6                  | 5            | 4               | 8               | 5                  | 16 to 19 years | 4                     |
| 20 to 24 years              | 13                 | 17           | 17              | 18              | 12                 | 20 to 24 years | 9                     |
| 25 to 34 years              | 27                 | 25           | 29              | 22              | 28                 | 25 to 34 years | 23                    |
| 35 to 44 years              | 22                 | 20           | 22              | 31              | 23                 | 35 to 49 years | 33                    |
| 45 to 54 years              | 21                 | 24           | 17              | 13              | 20                 | 50 to 64 years | 27                    |
| 55 to 59 years              | 4                  | 6            | 11              | 8               | 7                  |                |                       |
| 60+ years                   | 5                  | 3            |                 |                 | 4                  | 4              | 65+ years             |
| <i>Unweighted<br/>bases</i> | <i>287</i>         | <i>290</i>   | <i>428</i>      | <i>293</i>      | <i>4048</i>        |                | <i>32,277,500</i>     |

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

In terms of ethnicity, the vast majority of construction workers in Wales are of White origins, consistent with previous years (98% cf. 97% in 2015 and 100% in 2012).

Workers of Black (1%) and Asian (<0.5%) ethnic origin (BME) make up similar proportions of the sample as in previous years.



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

Base: All respondents

|                         | WA 2018/19<br>% | WA 2015<br>% | WA 2012<br>% | WA 2007<br>% | UK 2018/19<br>% | UK Population<br>aged 16-64*<br>% |
|-------------------------|-----------------|--------------|--------------|--------------|-----------------|-----------------------------------|
| White                   | 98              | 97           | 100          | 99           | 94              | 85                                |
| Black                   | 1               | <0.5         | <0.5         | 1            | 2               | 3                                 |
| Asian                   | <0.5            | <0.5         | 0            | 0            | 2               | 6                                 |
| Mixed                   | 1               | -            | -            | -            | 1               | 1                                 |
| Other/Not stated        | <0.5            | 2            | <0.5         | 0            | 1               | 4                                 |
| <i>Unweighted bases</i> | 287             | 290          | 428          | 293          | 4048            | 41,217,200                        |

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

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

Compared with the Wales population as a whole (aged 16-64), a lower proportion of construction workers in Wales are of BME origins (2% cf. 5% amongst the Wales population and 15% of the UK population).

Compared with other regions/nations, Wales has a low proportion of construction workers that are of BME origin.

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

Base: All respondents

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

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



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

The majority of construction workers in Wales (97%) originated from the UK and the remaining 3% originated from outside of the UK. No more than 1% of construction workers originate from a single specified country, while 1% of construction workers originate from an EU country other than the UK.

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

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

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

Just 2% of construction workers in Wales hold a passport for another country. This compares with a UK average of 14%. The majority hold a UK passport (86%), with a further 11% reporting that they do not have a passport. Of those with a non-UK passport, two-fifths (40%, equating to 1% of all construction workers in Wales) state that it is an EU member state passport. The remainder (60% of those with a non-UK passport, equating to 1% of all Wales construction workers) state that it is a non-EU passport.

Of those construction workers in Wales that were born outside of the UK or have a non-UK passport, none said they have British citizenship (cf. a UK average of 14%) as 75% said they did not and the remainder (25%) preferred not to say.

Overall, most construction workers in Wales have lived in the UK all of their life (94%). This proportion is significantly higher than the UK average (80%).

Amongst all construction workers in Wales, 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/disabilities amongst these workers is to do with reduced physical capacity, such as an inability to lift, carry or otherwise move everyday objects, debilitating pain and lack of strength, breath, energy or stamina, asthma, angina or diabetes (60%). Next most common



concerns hearing issues (40%). Across the UK, 3% of construction workers indicate they have a long-term illness, health problem or disability, and the most common condition is a reduced physical capacity (50%).

## Occupational profile

### Current job role

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

In 2018/19 labourers/general operatives, bricklayers and carpenters/joiners are the top three occupations amongst construction workers in Wales. This reflects the profile across the UK, although there are more plant/machine operatives within Wales. There has been a further increase in the proportion that are bricklayers since 2015 (from 10% in 2012 to 13% in 2015 to 15% in 2018/19) and bricklayers form a higher proportion within the Wales workforce than in the UK workforce.

**Figure 7: Occupational profile**

Base: All respondents '-' = not applicable

|                                              | WA<br>2018/19<br>% | WA<br>2015<br>% | WA<br>2012<br>% | WA<br>2007<br>%   | UK<br>2018/19<br>% |
|----------------------------------------------|--------------------|-----------------|-----------------|-------------------|--------------------|
| Labourer/General operative                   | 21                 | 22              | 27              | 18                | 16                 |
| Bricklayer                                   | 15                 | 13              | 10              | 8                 | 11                 |
| Carpenter/joiner                             | 13                 | 9               | 15              | 17                | 10                 |
| Plant/machine operative (e.g. Fork lift/JCB) | 12                 | 8               | 8               | 13                | 7                  |
| Site manager                                 | 9                  | 10              | 0               | 0                 | 11                 |
| Dryliner                                     | 5                  | 3               | 3               | With<br>plasterer | 3                  |
| Electrician                                  | 4                  | 3               | 8               | 6                 | 6                  |
| Technical                                    | 4                  | 2               | <0.5            | 2                 | 4                  |
| Ground worker                                | 4                  | 12              | 0               | 0                 | 4                  |
| Painter/decorator                            | 2                  | 3               | 4               | 3                 | 2                  |
| Banksman/Banksperson                         | 1                  | 2               | <0.5            | 3                 | 1                  |
| Ceiling fixer                                | 1                  | -               | -               | -                 | 1                  |
| Mechanical fitter                            | 1                  | -               | -               | -                 | 1                  |
| Pipe fitter                                  | 1                  | -               | -               | -                 | 2                  |
| Plasterer                                    | 1                  | <0.5            | -               | -                 | 1                  |
| Plumber                                      | 1                  | 7               | -               | -                 | 4                  |
| Roofer                                       | 1                  | -               | -               | -                 | 2                  |
| Steel erector/rigger                         | 1                  | -               | -               | -                 | 1                  |
| Glazer/window fitter                         | 1                  | -               | -               | -                 | 1                  |
| <i>Unweighted bases</i>                      | 287                | 290             | 428             | 293               | 4048               |

Q5



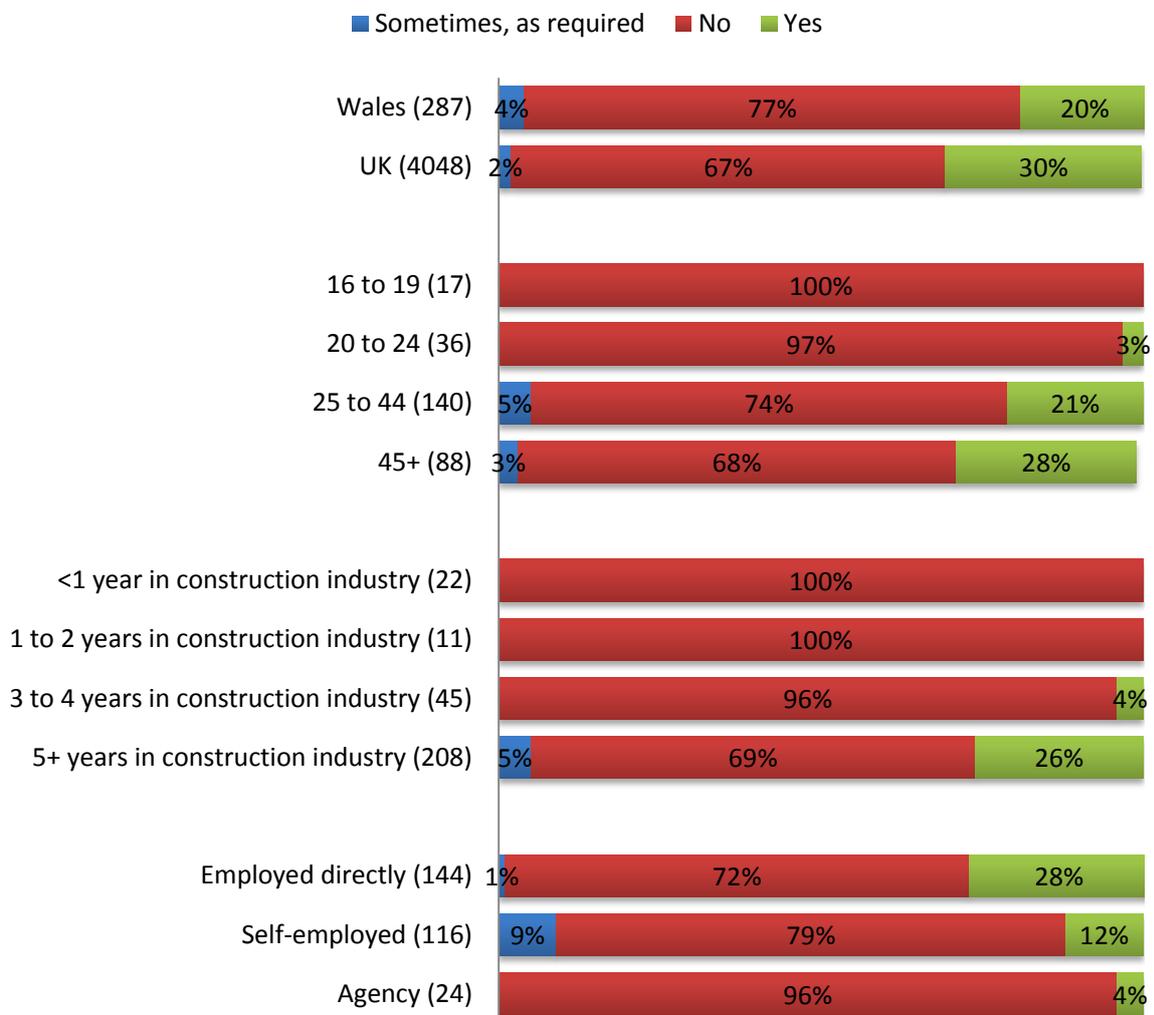
## Supervisory roles

A fifth of all construction workers in Wales interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (20%). This is a slightly lower proportion than in 2015 (22%), and significantly lower compared to the UK average in 2018/19 (30%).

The incidence of workers in a supervisory role is considerably lower amongst workers aged under 25 and amongst those that have worked in the construction industry for less than 5 years, as one would expect. Workers who are directly employed by a company (28%) are more likely than those that are self-employed (12%) or work for an agency (4%) to perform a supervisory or management role. These differences are summarised in the following figure.

**Figure 8: Whether respondents perform a supervisory or management role**

Base: All respondents \*Caution: small sample base



Unweighted bases in parentheses Q8



## Employment status

The highest proportion of construction workers within the 2018/19 Wales sample is employed directly by a company (50%). This is a lower proportion than in 2015 and 2012 (66% in 2015 and 56% in 2012). Half the respondents who have been working in the construction sector for at least 5 years (51%) are directly employed, compared with 41% of those who have worked in the industry for less than a year. The proportion of respondents that are directly employed increases to 62% of plant/machine operatives.

Two-fifths of construction workers within the 2018/19 Wales sample is self-employed (40%), which is a higher proportion than in 2015 (27%) but slightly lower than in 2012 (43%). The proportion of workers who are self-employed increases by age from 24% of 16 to 19 year olds to 47% of workers aged 20 to 24 years and is lower amongst 25 to 44 year olds (42%) and 45+ year olds (36%). More than four-fifths of bricklayers are self-employed (84%).

Just 8% of the sample is accounted for by construction workers who are working for an employment agency, although this is slightly higher than the proportion reported in 2015 (6%) and significantly higher than in 2012 (1%).

### Figure 9: Employment status

Base: All respondents \*caution small sample base

|                                                                     | WA<br>2018/19<br>% | WA<br>2015<br>% | WA<br>2012<br>% | UK<br>2018/19<br>% | Years working in<br>construction |            |           |            |
|---------------------------------------------------------------------|--------------------|-----------------|-----------------|--------------------|----------------------------------|------------|-----------|------------|
|                                                                     |                    |                 |                 |                    | <1                               | 1-2        | 3-4       | 5+         |
| Employed directly by a<br>company (contractor<br>or sub-contractor) | 50                 | 66              | 56              | 49                 | 41                               | 18         | 58        | 51         |
| Self-employed                                                       | 40                 | 27              | 43              | 43                 | 23                               | 55         | 33        | 43         |
| Working for an<br>employment agency                                 | 8                  | 6               | 1               | 7                  | 27                               | 27         | 7         | 6          |
| Working on some<br>other basis                                      | 1                  | 1               | 0               | <0.5               | 9                                | 0          | 2         | 0          |
| <i>Unweighted bases</i>                                             | <i>287</i>         | <i>290</i>      | <i>428</i>      | <i>4048</i>        | <i>22</i>                        | <i>11*</i> | <i>45</i> | <i>208</i> |

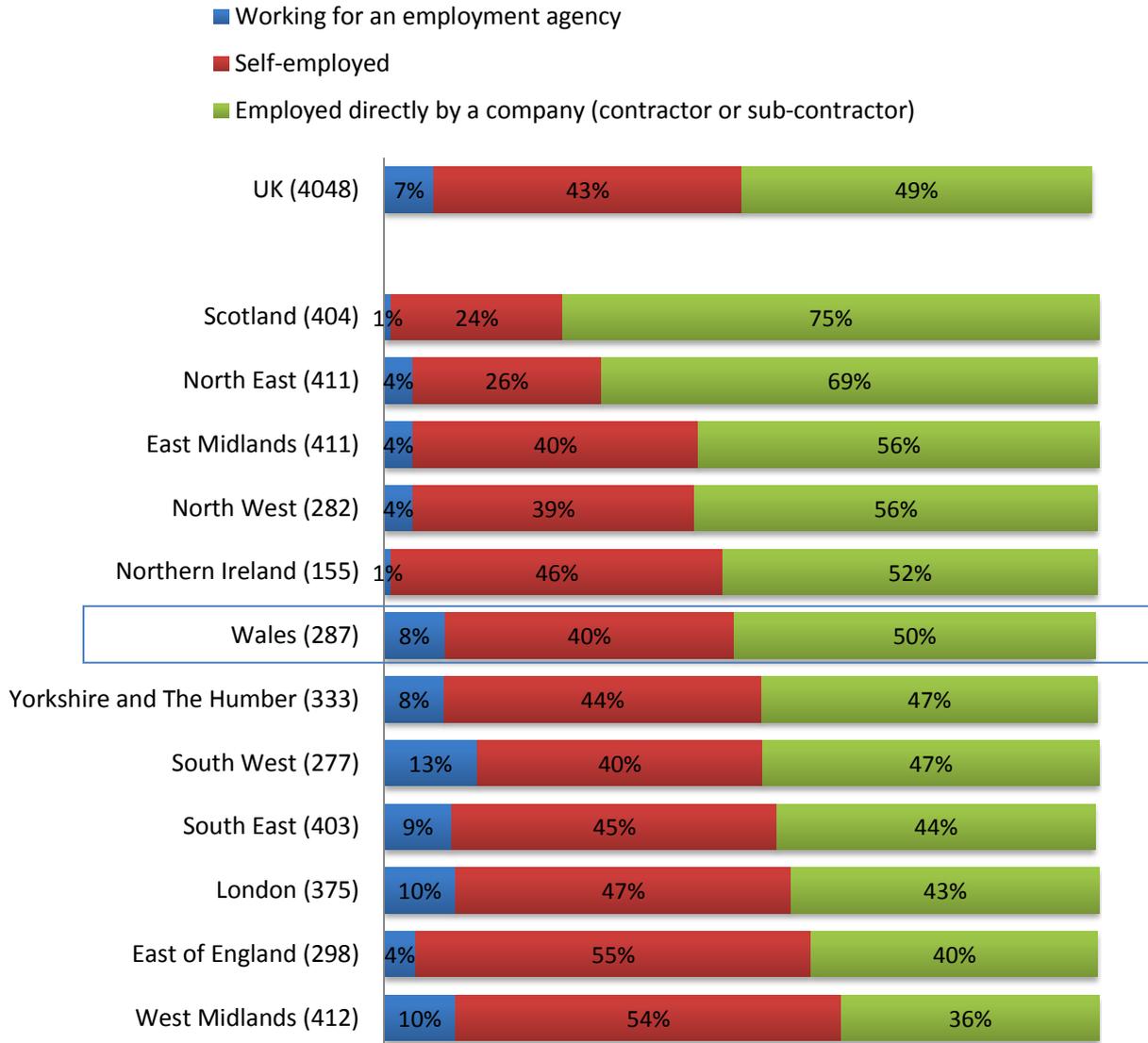
Q20



Compared with UK construction workers, the employment status profile of those in Wales is similar.

**Figure 10: Employment status by region/nation**

*Base: All respondents*



*Unweighted bases in parentheses* Q20



## Employment contract basis

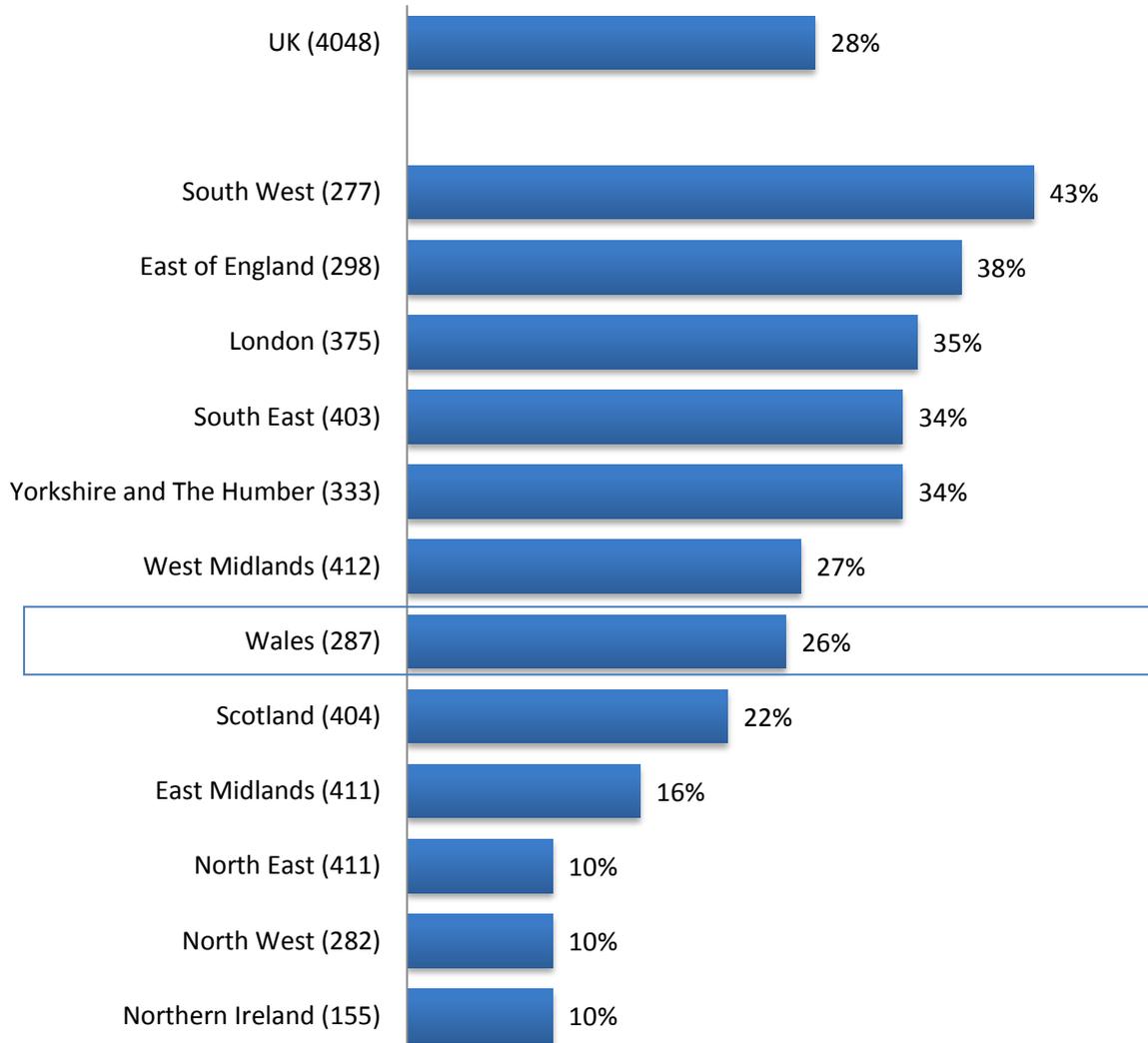
Overall, one in four Wales construction workers (26%) is employed on a temporary rather than permanent basis (70%). This reflects a move towards more temporary employment in 2018/19 compared with 2015 when a fifth (19%) was employed on a temporary basis.

Amongst workers who are employed by an agency the proportion on temporary contracts is higher than it is amongst those who are self-employed or employed directly (88%, compared with 39% and 6% respectively).

Wales is similar to the UK average with regard to the profile of its construction workforce in terms of temporary employment contracts held, as the following figure illustrates.

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

*Base: All respondents*



*Unweighted bases in parentheses* Q21



By current trade/role, the proportion working on a temporary basis is higher than average amongst bricklayers (40%) and lowest amongst site managers (12%).

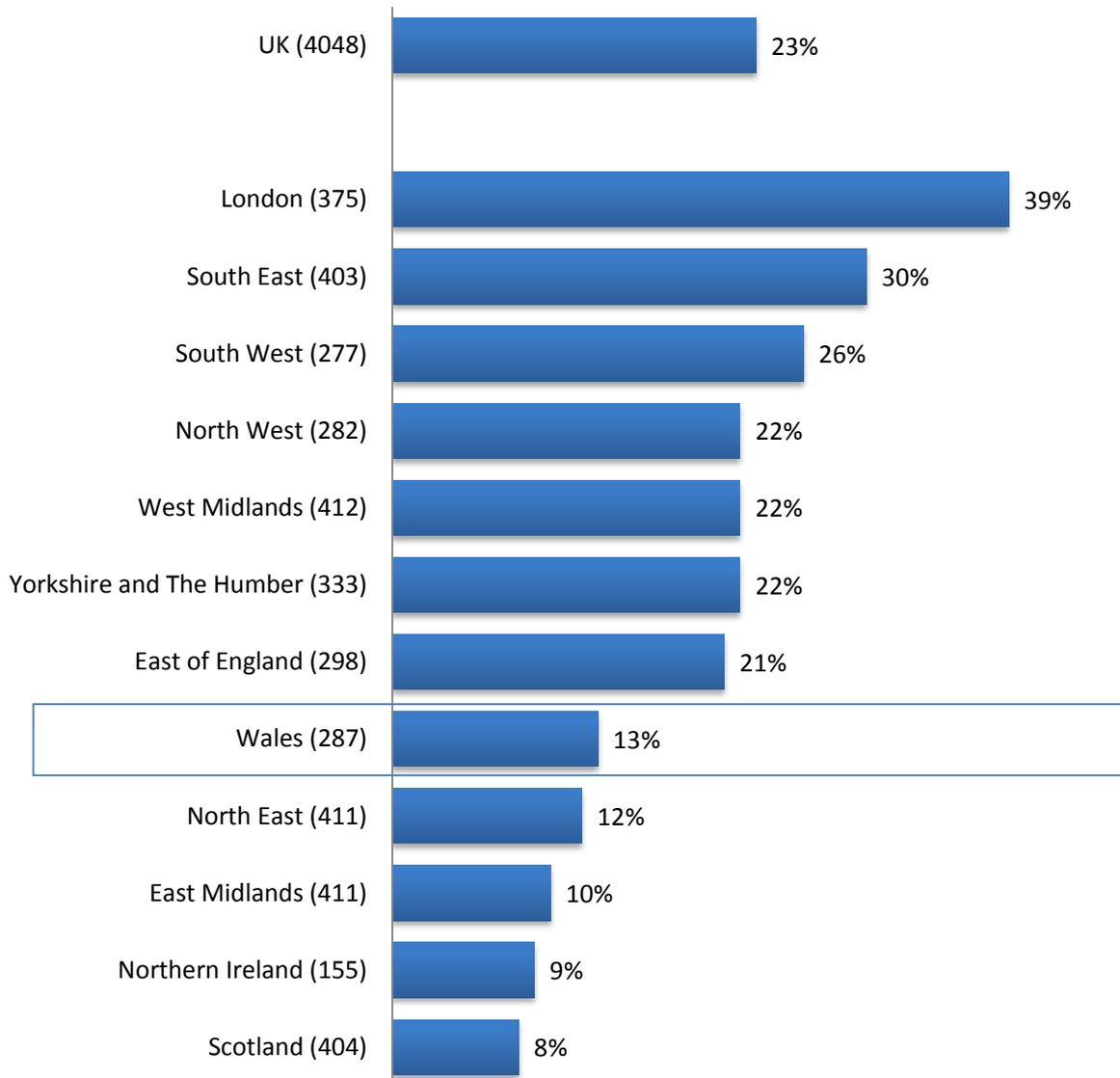
### Hours worked

Construction workers in Wales, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (68%, compared with a UK average of 60%). One in eight (13%) works more than 50 hours a week, which is lower than the UK average (23%).

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

Base: All respondents

Unweighted bases in parentheses



Unweighted bases in parentheses Q22



## Work histories

### Time in the sector

Two-fifths of Wales construction workers have worked in the construction industry for at least 20 years (39%) and three-fifths have worked in the industry for at least 10 years (58%).

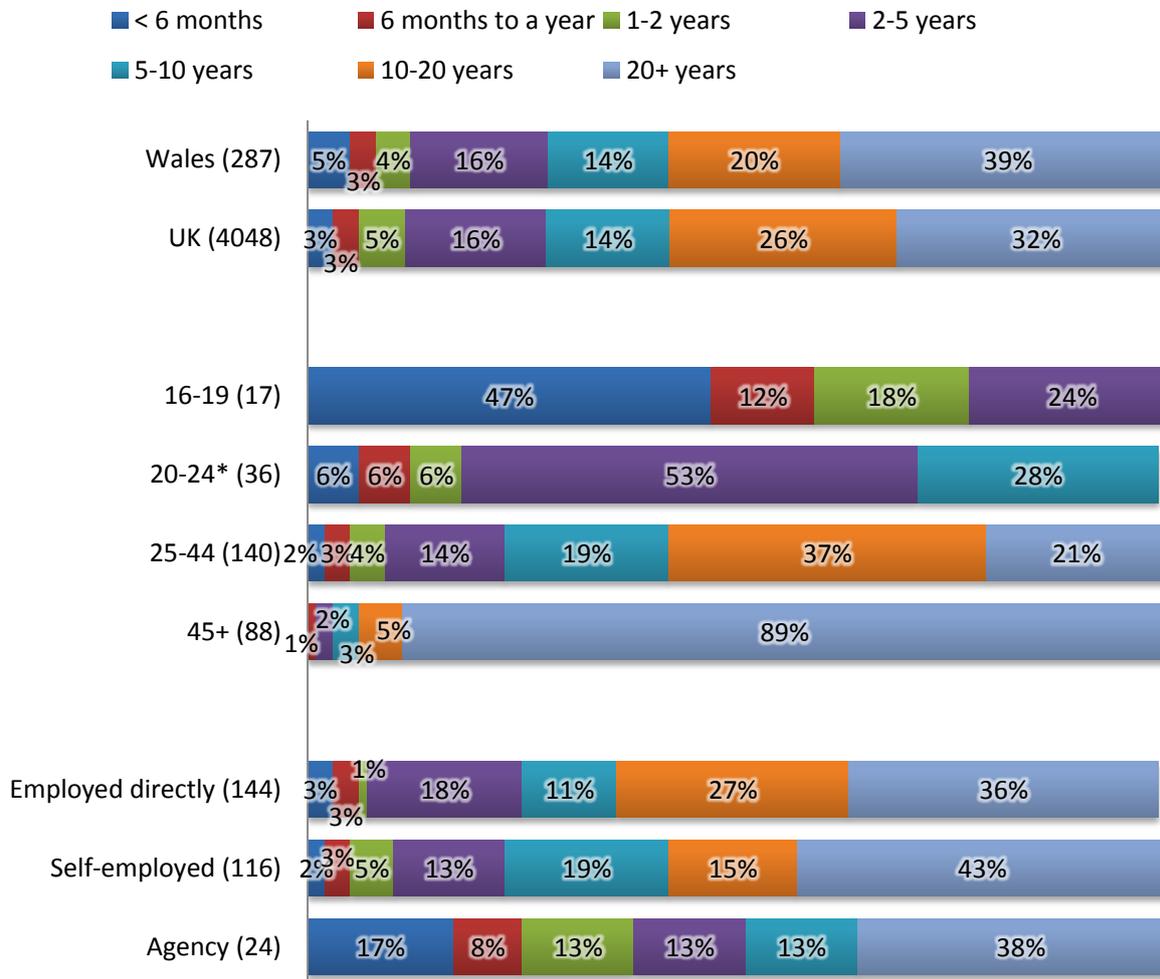
Construction workers in Wales are more likely than the UK average to have worked in the industry for over 20 years (39% cf. 32% across the UK).

The length of experience in the industry increases with age to more than almost nine-tenths of workers aged 45 and over have more than 20 years' experience of working in the construction sector (89%).

**Figure 13: Years spent working in the construction sector**

Base: All respondents

Unweighted bases in parentheses



Unweighted bases in parentheses Q1 \* 3% unsure



Compared with 2015, Figure 14 shows that, in 2018/19, more workers in Wales are likely to have worked in the construction sector for more than 20 years; 39% have 20+ years experience, compared with 34% in 2015, whilst 42% have 10 or fewer years experience, as in 2015.

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

*Base: All respondents*

|                         | <b>WA 2018/19</b><br>% | <b>WA 2015</b><br>% | <b>WA 2012</b><br>% | <b>WA 2007</b><br>% | <b>UK 2018/19</b><br>% |
|-------------------------|------------------------|---------------------|---------------------|---------------------|------------------------|
| Less than 6 months      | 5                      | 7                   | 1                   | 2                   | 3                      |
| Up to a year            | 8                      | 11                  | 4                   | 8                   | 6                      |
| Up to 2 years           | 12                     | 14                  | 8                   | 13                  | 12                     |
| Up to 5 years           | 28                     | 28                  | 19                  | 32                  | 28                     |
| Up to 10 years          | 41                     | 42                  | 43                  | 48                  | 42                     |
| Up to 20 years          | 61                     | 63                  | 66                  | 73                  | 68                     |
| More than 20 years      | 39                     | 34                  | 34                  | 26                  | 32                     |
| <i>Unweighted bases</i> | 287                    | 290                 | 428                 | 293                 | 4048                   |



## Pre-construction employment histories

Seven in ten workers in Wales have only ever worked in the construction industry (70% cf. 67% across the UK and 63% within Wales in 2015). This includes around three-fifths who have worked in construction pretty much continuously (59%); 6% for whom this is their first job; and a further 6% that have only ever worked in the construction sector, but have had spells out of work.

The likelihood that workers have worked continuously in construction increases with age; up to two-thirds of workers aged 45 and over (65%). Younger workers are more likely to say that this is their first job and that they have not worked in any other industry (35% of 16 to 19 year olds).

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

*All respondents \* caution: small sample base*

|                                                                                                                                  | WA<br>2018/19<br>% | WA<br>2015<br>% | UK<br>2018/19<br>% | Age<br>%    |             |             |           |
|----------------------------------------------------------------------------------------------------------------------------------|--------------------|-----------------|--------------------|-------------|-------------|-------------|-----------|
|                                                                                                                                  |                    |                 |                    | 16 to<br>19 | 20 to<br>24 | 25 to<br>44 | 45+       |
| I've worked in construction pretty much continuously (and not worked in any other industry)                                      | 59                 | 53              | 56                 | 29          | 56          | 59          | 65        |
| I have only worked in construction jobs but have had spells of being out of work                                                 | 6                  | 6               | 4                  | 6           | 0           | 9           | 3         |
| My first job was in construction but I've also worked in other sorts of jobs in one or more other industries                     | 6                  | 14              | 7                  | 12          | 3           | 4           | 7         |
| My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs | 19                 | 21              | 23                 | 0           | 17          | 21          | 22        |
| This is my first job. I haven't worked in any other industry.                                                                    | 6                  | 4               | 7                  | 35          | 19          | 2           | 1         |
| This is my first job in construction but I have worked in other sorts of jobs in one or more other industries                    | 5                  | 1               | 3                  | 18          | 6           | 5           | 2         |
| <i>Unweighted bases</i>                                                                                                          | <i>287</i>         | <i>290</i>      | <i>4048</i>        | <i>17*</i>  | <i>36</i>   | <i>140</i>  | <i>88</i> |

Q2



Overall, around 1 in 5 construction workers in Wales say that their first job after full-time education was not in construction and that they moved into the industry after working in other sorts of jobs/sectors (19%). This is a slightly lower proportion than that reported in 2015 (21%).

Those who had worked in other sectors before starting their construction careers were asked to give details of what they were doing immediately before they started working in construction. In more than a third of cases, respondents had previously worked in the wholesale and retail/motor vehicle repair trade (37%), which is a higher proportion than among construction workers across the UK as a whole (19%). A third had previously worked in manufacturing (35%), fewer than the UK average (45%).

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

*Base: Where first job was not in construction*

|                                                                          | <b>WA<br/>2018/19<br/>%</b> | <b>WA 2015<br/>%</b> | <b>UK<br/>2018/19<br/>%</b> |
|--------------------------------------------------------------------------|-----------------------------|----------------------|-----------------------------|
| G - Wholesale and retail trade; repair of motor vehicles and motorcycles | 37                          | 23                   | 19                          |
| C – Manufacturing                                                        | 35                          | 30                   | 45                          |
| B – Mining and quarrying                                                 | 7                           | 3                    | 6                           |
| E – Water supply, sewerage, waste management and remediation activities  | 7                           | 2                    | 3                           |
| H - Transportation and storage                                           | 6                           | 2                    | 6                           |
| O – Public administration and defence                                    | 4                           | 2                    | <0.5                        |
| A - Agriculture, Forestry and Fishing                                    | 2                           | 6                    | 9                           |
| <i>Unweighted bases</i>                                                  | <i>54</i>                   | <i>64</i>            | <i>862</i>                  |

Q3

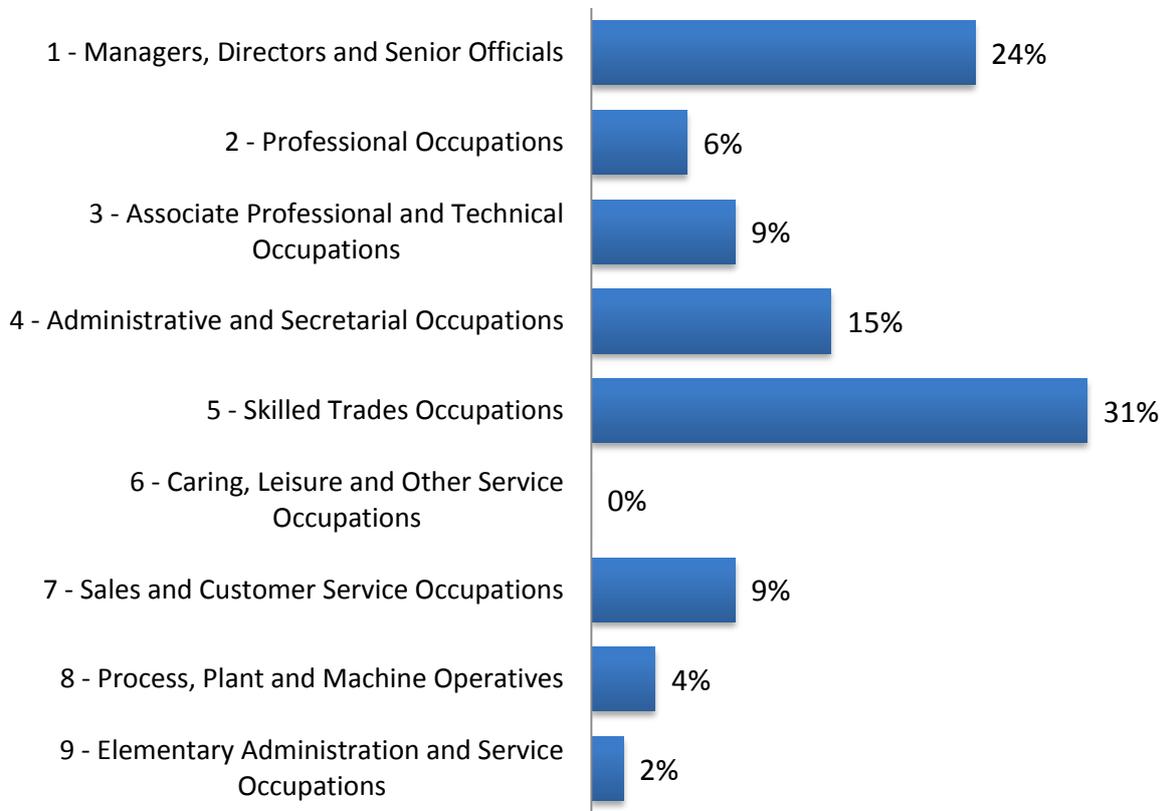


In terms of the job roles that construction workers in Wales have undertaken in other sectors, just under a third had worked in skilled trades occupations (31% cf. 27% across the UK) and around a quarter had worked in managerial occupations (24% cf. 19% across the UK).

Around 1 in 7 workers that had worked in other sectors had worked in administrative and secretarial occupations (15%), while around 1 in 10 had worked in associate professional and technical occupations (9%) or sales and customer service occupations (9%). These figures compare with 6%, 28%, and 3% across the UK as a whole.

**Figure 17: Job roles undertaken in other sectors**

*Base: Where first job was not in construction*



*Unweighted base = 54 Q3*



## Occupational switching and progression within construction

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

Overall, three in ten construction workers in Wales have worked in more than one construction trade or occupation whilst working in the construction industry (29%), which is a lower proportion than in 2015 and compared with the UK average in 2018/19 (35% and 36% respectively).

The proportion of workers that have had more than one role increases with age (to 35% amongst those aged 45+ cf. 6% amongst those aged 16 to 19 years and 11% amongst those aged 20 to 24 years).

All workers with the highest level of qualifications (Level 4 and above) have had more than one role or occupation within the construction sector (although this is based on a very small number of respondents) as are those in a supervisory or management role on site (46%).

As in 2015, there are also variations by current job role, with site managers (64%) and plant/machine operatives (47%) most likely to have had more than one role/occupation within construction. Carpenters/joiners (8%) are least likely to have had any other trade within the construction sector. The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector.

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

*Base: All respondents*

| MORE likely to have had more than one role |                             |                             | LESS likely to have had more than one role |                             |                             |
|--------------------------------------------|-----------------------------|-----------------------------|--------------------------------------------|-----------------------------|-----------------------------|
|                                            | <b>WA<br/>2018/19<br/>%</b> | <b>UK<br/>2018/19<br/>%</b> |                                            | <b>WA<br/>2018/19<br/>%</b> | <b>UK<br/>2018/19<br/>%</b> |
| Site manager (25)                          | 64                          | 69                          | Labourer/Gen. Op. (59)                     | 31                          | 29                          |
| Plant/Mach. Op. (34)                       | 47                          | 55                          | Bricklayer (43)                            | 19                          | 24                          |
|                                            |                             |                             | Carpenter/Joiner (38)                      | 8                           | 22                          |

*Unweighted bases for 2018/19 Wales in parentheses*

Q6



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

Workers are most likely to have previously worked as a labourer/general operative (35%) while just over 1 in 5 workers has previously worked as a carpenter/joiner (22%) and 1 in 6 had previously worked as a plant/machine operative (16%).

**Figure 19: Previous occupations/trades in the construction sector**

*Base: Workers that have switched occupations within construction*

| Occupation                                      | WA 2018/19<br>% | UK 2018/19<br>% |
|-------------------------------------------------|-----------------|-----------------|
| Labourer/General operative                      | 35              | 34              |
| Carpenter/joiner                                | 22              | 19              |
| Plant/machine operative (e.g. Fork lift/JCB)    | 16              | 10              |
| Bricklayer                                      | 13              | 12              |
| Roofer                                          | 10              | 8               |
| Plasterer                                       | 10              | 8               |
| Banksman/Banksperson                            | 10              | 6               |
| Dryliner                                        | 8               | 8               |
| Steel erector/rigger                            | 8               | 4               |
| Painter/decorator                               | 7               | 7               |
| Ceiling fixer                                   | 7               | 5               |
| Pipe fitter                                     | 6               | 4               |
| Technical e.g. surveyor, maintenance technician | 5               | 3               |
| Floorer                                         | 4               | 4               |
| Site manager                                    | 4               | 5               |
| Scaffolder                                      | 4               | 4               |
| Plumber                                         | 4               | 5               |
| Welder                                          | 4               | 2               |
| Ground worker                                   | 2               | 5               |
| Electrician                                     | 0               | 5               |
| Mechanical fitter                               | 0               | 1               |
| Fencer                                          | 0               | <0.5            |
| Other                                           | 2               | 7               |
| <i>Unweighted base</i>                          | <i>83</i>       | <i>1328</i>     |

Q7



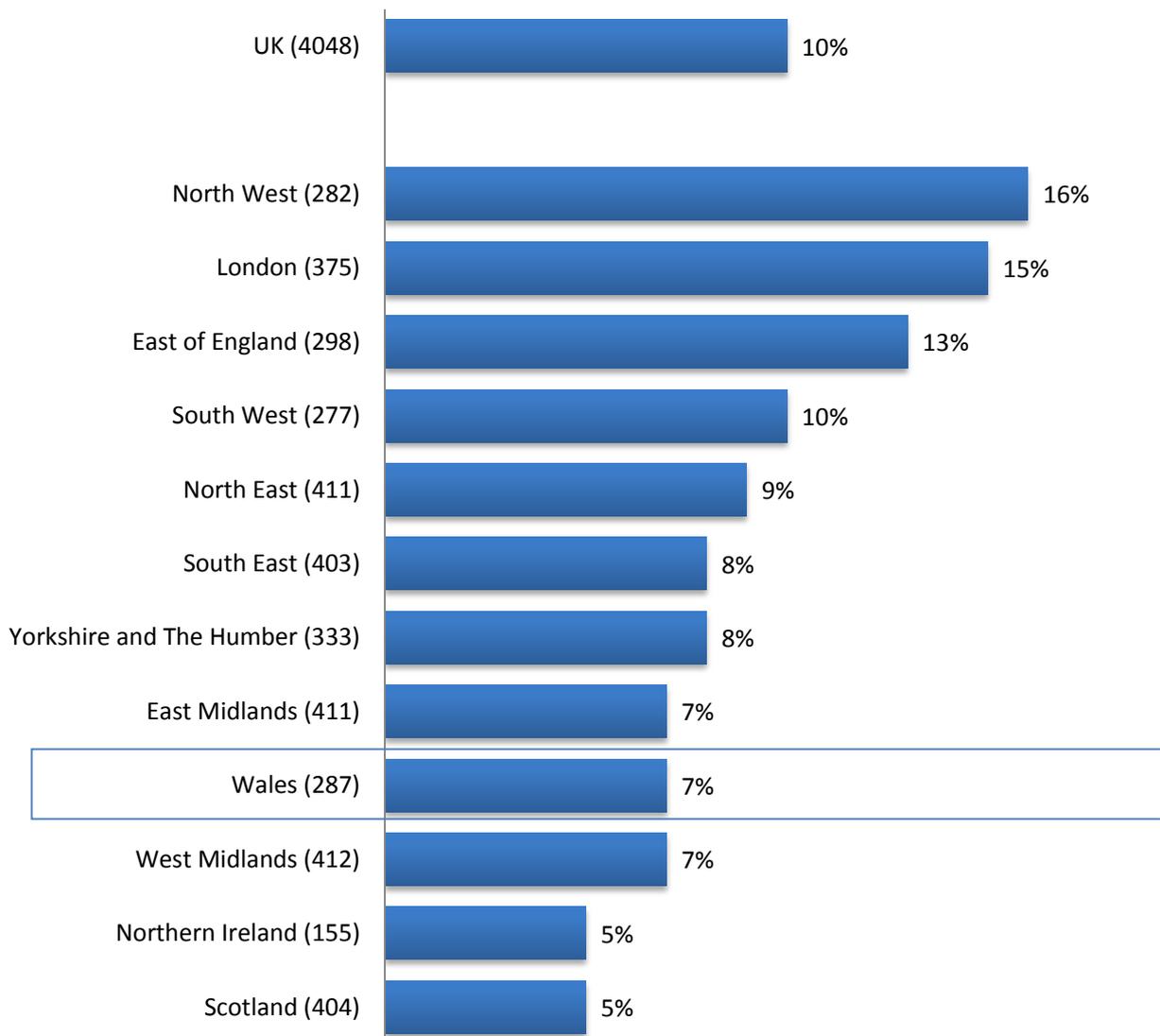
### Future career plans

Thinking about their future plans in construction, 8 in 10 construction workers in Wales would like to carry on in the same trade or occupation (80%); around 1 in 20 would like to change their trade/occupation (7%); and just 2% would like to leave construction. The remainder (10%) are not sure.

Compared with the UK average, construction workers in Wales are equally likely to want to carry on as they are (80% across the UK) and slightly fewer are likely to want to change their trade/occupation (10% across the UK).

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

*Base: All respondents*



*Unweighted bases in parentheses Q33*



Construction workers aged 20 to 24 years are more likely than those in other age groups to want to change their trade or occupation (11%). Older workers are more likely than average to want to carry on as they are (92% of 45+ year olds).

By current trade/occupation, those working as labourers/general operatives (69%) are least likely to want to carry on as they are.

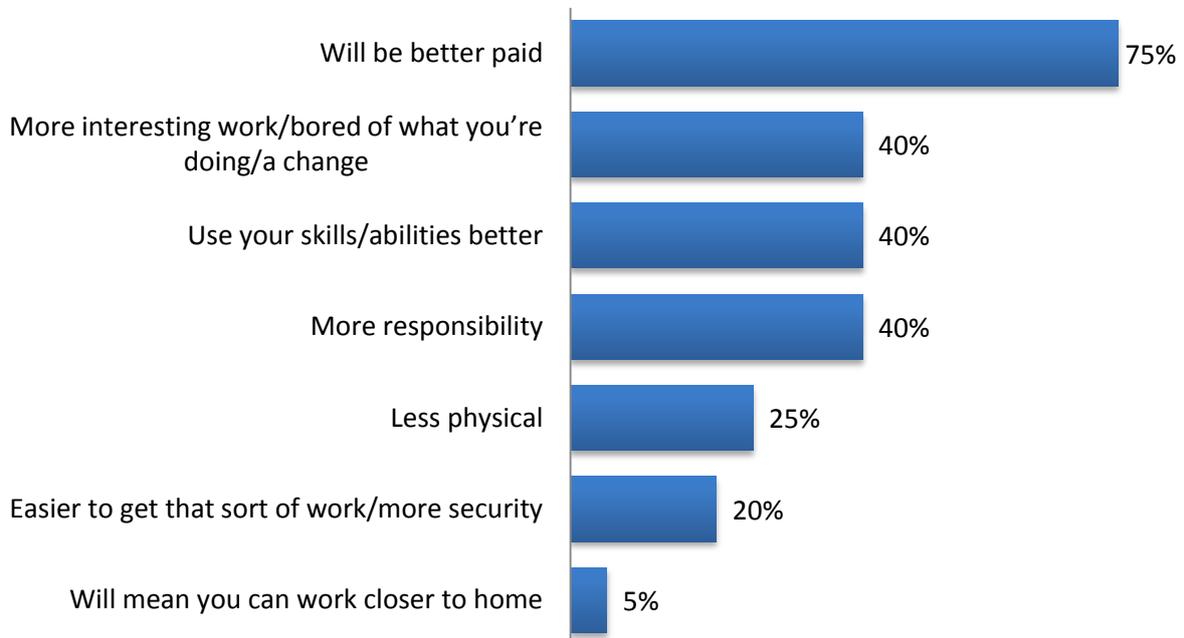
Amongst those who would like to change trade or occupation, a wide range of alternative trades/occupations are mentioned. However, the highest proportion overall would like to be a site manager (45%).

In 9 in 10 cases where construction workers in Wales would like to change trade or occupation, they believe they will require further training or qualifications in order to do this (90%). This is a higher proportion than in 2015 (71%) and is similar to that reported across the UK in 2018/19 (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (75%), while two-fifths believe they would have more interesting work (or that they are bored with what they are currently doing), that they could use their skills/abilities better, or that they would like more responsibility (all 40%). A quarter want work that is less physical (25%) and a fifth feel the work they would want to change to would be easier to get or would give them more job security (20%).

**Figure 21: Reasons for wanting to change trade/occupation**

*Base: Where workers would like to change trade/occupation*



*Unweighted base = 20 Q36*



## Qualifications and skills

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

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

### Construction skill cards and certificates

When asked which type of construction skill certificate or card they currently hold (e.g. CSCS or CSR), 7% of all construction workers in Wales (2% across the UK) say they do not hold any card and 1% are unsure. In total, therefore, 92% of all workers are certain that they hold at least one type of skill card or certificate that provides evidence to construction sites that they have received a certain level of health and safety awareness training.

Figure 22 summarises the proportion of workers by region/nation that hold any card and compares these proportions with previous surveys and the UK as a whole. Workers in Wales are the least likely to hold skill certificates or cards as in previous surveys. Since 2012, this proportion has remained unchanged.

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

*Base: All respondents*

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



As in previous surveys, the incidence of workers holding skill cards or certificates remains lower amongst younger workers (82% amongst 16 to 19 year olds and 89% amongst 20-24 year olds) and those who have worked within construction for a shorter period of time (82% 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 23: Proportion of workers that have a skill card/certificate, by other variables**

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

|                                      |                              | WA<br>2018/19<br>% | WA<br>2015<br>% | WA<br>2012<br>% | WA<br>2007<br>% | UK<br>2018/19<br>% |
|--------------------------------------|------------------------------|--------------------|-----------------|-----------------|-----------------|--------------------|
| Total (287)                          |                              | 92                 | 92              | 92              | 82              | 97                 |
| Age                                  | 16 to 19 years* (17)         | 82                 | 100             | 65              | 61              | 85                 |
|                                      | 20 to 24 years (36)          | 89                 | 87              | 85              | 79              | 97                 |
|                                      | 25 to 44 years (140)         | 94                 | 96              | 98              | 83              | 98                 |
|                                      | 45+ years (88)               | 93                 | 87              | 91              | 92              | 98                 |
| Length of time<br>in<br>construction | <1 year in construction (22) | 82                 | 91              | 60              | 44              | 89                 |
|                                      | 1 to 2 years* (11)           | 91                 | 100             | 79              | 67              | 97                 |
|                                      | 2 to 5 years (45)            | 91                 | 85              | 83              | 85              | 96                 |
|                                      | 5+ years (208)               | 94                 | 94              | 95              | 87              | 98                 |
| Contract-type                        | Employed directly (144)      | 90                 | 93              | 89              | 86              | 96                 |
|                                      | Self- employed (116)         | 97                 | 87              | 97              | 74              | 98                 |
|                                      | Agency (24)                  | 88                 | 94              | 0               | 71              | 97                 |

*Unweighted bases for 2018/19 Wales in parentheses*

Q12



In terms of the type of skill card or certificate held by construction workers in Wales, the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (83%), as it was in 2015 (also 83%). Overall, 14% hold the CPCS (Construction Plant Competence Scheme) card/certificate and this proportion increases to 18% amongst workers that are employed directly, which compares with 10% of the self-employed and 8% of agency workers).

**Figure 24: Type of skill card/certificate held**

*Base: All respondents*

|                                                         | <b>WA<br/>2018/19<br/>%</b> | <b>WA 2015<br/>%</b> | <b>WA 2012<br/>%</b> | <b>UK<br/>2018/19<br/>%</b> |
|---------------------------------------------------------|-----------------------------|----------------------|----------------------|-----------------------------|
| CSCS (Construction Skills Certification Scheme) (GB)    | 83                          | 83                   | 87                   | 85                          |
| CSR (Construction Skills Register) (NI)                 | 1                           | 1                    |                      | 3                           |
| CISRS (Construction Industry Scaffolders Record Scheme) | 1                           | 2                    | <0.5                 | 3                           |
| CPCS (Construction Plant Competence Scheme)             | 14                          | 18                   | 10                   | 11                          |
| Other                                                   | 4                           | 3                    | 6                    | 4                           |
| <i>Unweighted bases</i>                                 | <i>287</i>                  | <i>290</i>           | <i>428</i>           | <i>4048</i>                 |

Q12

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

- Plant/machine operatives (68%) are more likely to hold CPCS (Construction Plant Competence Scheme);
- More than 90% of carpenters/joiners (97%), bricklayers (93%), and labourers/general operatives (92%) hold CSCS (Construction Skills Certification Scheme (GB)).



Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 25 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Overall, within Wales, 4% of CSCS card holders have Red Trainee cards and 1% have Red Experienced worker cards; a third of CSCS (32%) card holders have Green cards and more than a quarter have Blue cards (27%). One in five CSCS card holders have Gold cards for advanced craft/skilled workers (19%) and 5% have the Gold card for supervisors.

**Figure 25: Colour of CSCS/CSR cards held**

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

|                                                                   | CSCS %     |                                                           | CSR* %   |
|-------------------------------------------------------------------|------------|-----------------------------------------------------------|----------|
| Red - Trainee                                                     | 4          | Red - Apprenticeship/Trainee                              | 0        |
| Red - Experienced worker card                                     | 1          | Red - Trained Plant Operator                              | 0        |
| Green - construction site operative card for general site workers | 32         | Green - Construction Operative (for general site workers) | 0        |
| Blue - skilled                                                    | 27         | Blue - Operative/ Craft                                   | 50       |
| Gold - supervisor card                                            | 5          | Blue – Plant operator                                     | 50       |
| Gold - Advanced craft/skilled worker                              | 19         | Gold - Craft/Supervisor Card                              | 0        |
| Black - contracts manager card                                    | 5          | Gold - Advanced Scaffolder                                | 0        |
| Other                                                             | 2          | Black - Senior Managers Card                              | 0        |
| Unsure                                                            | 3          | Gold - Craft/Supervisor Card                              | 0        |
| <i>Unweighted bases</i>                                           | <i>237</i> |                                                           | <i>2</i> |

Q13/Q14

Younger workers are more likely to hold Red Trainee cards (31% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Blue cards (33% of 45+ year olds). Workers currently employed by an agency are more likely to hold Green cards (71%), compared with those employed directly or self-employed (32% and 24% respectively).

Card colours also vary significantly according to current occupation/trade, as Figure 26 summarises. Some significant differences include that labourers/general operatives are most likely to hold Green cards (69%); plant and machine operatives (63%) are most likely to hold Blue cards, and site managers are most likely to hold Black (managers) cards (40%).

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

Base: Where currently hold a CSCS card \*caution: small sample base

|                     | <i>Unweighted bases</i> | Red: Trainee % | Red: Experienced worker card % | Green % | Blue % | Gold % | Black % |
|---------------------|-------------------------|----------------|--------------------------------|---------|--------|--------|---------|
| Labourer / Gen. Op. | 54                      | 2              | 2                              | 69      | 19     | 4      | 0       |
| Plant / Mach. Op.*  | 19                      | 0              | 0                              | 32      | 63     | 0      | 0       |
| Carpenter / Joiner  | 37                      | 11             | 0                              | 8       | 19     | 62     | 0       |
| Bricklayer          | 40                      | 0              | 0                              | 15      | 40     | 38     | 0       |



|              |    |   |   |   |   |    |    |
|--------------|----|---|---|---|---|----|----|
| Site manager | 20 | 0 | 0 | 0 | 5 | 30 | 40 |
|--------------|----|---|---|---|---|----|----|

### Construction qualifications held

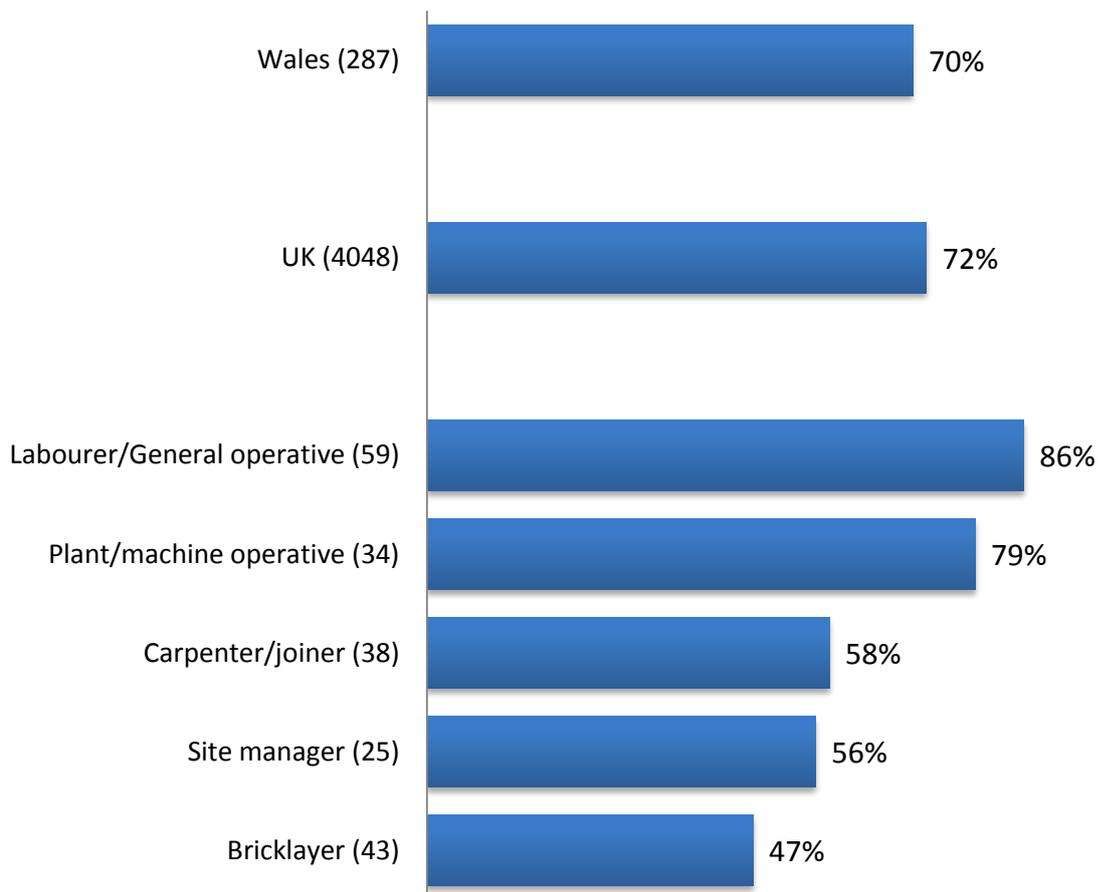
All workers were asked about the construction-specific qualifications they held after leaving full-time education and starting their first proper job in construction.

Overall, 70% of construction workers in Wales say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 76% in Wales in 2015 and 72% of all UK construction workers in 2018/19.

By current trade/occupation within Wales, the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (86%) and lowest among bricklayers (47%).

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

Base: All respondents \*caution: small sample base



Unweighted bases in parentheses Q15/Q16



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

Overall, around 7 in 10 construction workers in Wales reported holding some sort of construction related qualification at the time of interview (69%), compared with a lower proportion in 2015 (58%). Compared with the UK average, construction workers in Wales were slightly less likely to hold some sort of construction-related qualification at the time of the interview (72% across the UK).

As Figure 28 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 (32%), and this is lower than in 2015 (55%).

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

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

|                                   |                                 | WA<br>2018/19<br>% | WA 2015<br>% | WA 2012<br>% | WA 2007<br>% | UK<br>2018/19<br>% |
|-----------------------------------|---------------------------------|--------------------|--------------|--------------|--------------|--------------------|
| Total (287)                       |                                 | 69                 | 58           | 70           | 63           | 72                 |
| Age                               | 16 to 19 years*<br>(17)         | 41                 | 73           | 44           | 39           | 52                 |
|                                   | 20 to 24 years (36)             | 64                 | 63           | 70           | 55           | 63                 |
|                                   | 25 to 44 years<br>(140)         | 72                 | 62           | 73           | 68           | 72                 |
|                                   | 45+ years (88)                  | 72                 | 45           | 68           | 68           | 77                 |
| Length of time<br>in construction | <1 year in<br>construction (22) | 32                 | 55           | 22           | 38           | 34                 |
|                                   | 1 to 2 years* (11)              | 45                 | 90           | 40           | 40           | 52                 |
|                                   | 2 to 5 years (45)               | 62                 | 47           | 72           | 45           | 63                 |
|                                   | 5+ years (208)                  | 75                 | 60           | 74           | 69           | 79                 |
| Current<br>contract type          | Employed directly<br>(144)      | 66                 | 55           | 68           | 63           | 75                 |
|                                   | Self-employed<br>(116)          | 79                 | 63           | 73           | 68           | 73                 |
|                                   | Agency (24)                     | 33                 | 79           | 0            | 23           | 49                 |

*Unweighted bases for 2018/19 Wales in parentheses*

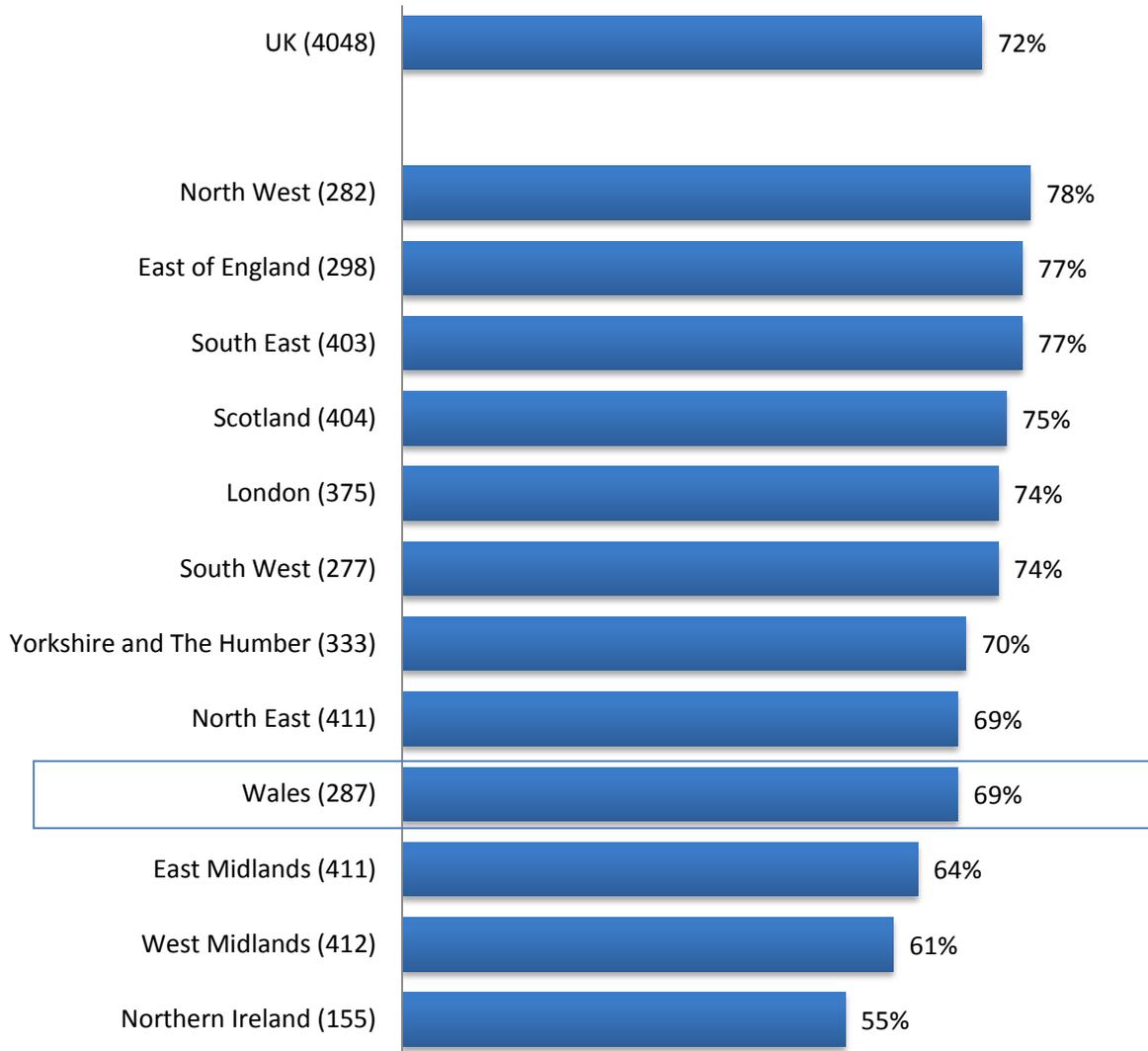
Q15/Q16



Wales is below the UK average in terms of the propensity of its construction workforce to hold any construction-specific qualifications (see Figure 29).

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

*Base: All respondents*



*Unweighted bases in parentheses*      Q15/Q16

The likelihood that workers hold any qualifications also varies significantly by current job role. Bricklayers (95%), site managers (92%), and carpenters/joiners (92%) are more likely than average to hold qualifications. Only a third of labourers/general operatives (36%) hold any.



## Type of construction qualifications held

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

The qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (65%), which is similar proportion reported in 2015 in Wales (63% in 2015) but higher than the UK 2018/19 average (58%). One in five construction workers in Wales with qualifications hold City & Guilds qualifications (20%), a similar proportion to that in 2015 (21%) but higher than the UK 2018/19 average (14%). In Wales, just 4% of construction workers with qualifications hold an apprenticeship. This is a higher proportion than in 2015 within Wales but lower than the UK average in 2018/19 (6%).

### Figure 30: Main type of qualification held

Base: Workers with qualifications (valid responses)

|                         | WA<br>2018/19<br>% | WA<br>2015<br>% | WA<br>2012<br>% | WA<br>2007<br>% | UK<br>2018/19<br>% |
|-------------------------|--------------------|-----------------|-----------------|-----------------|--------------------|
| NVQ/SVQ                 | 65                 | 63              | 67              | 44              | 58                 |
| City & Guilds           | 20                 | 21              | 23              | 30              | 14                 |
| Apprenticeship          | 4                  | 2               | 0               | 3               | 6                  |
| HNC/HND/BTEC Higher     | 6                  | 6               | 1               | 5               | 6                  |
| Degree                  | 7                  | 7               | <0.5            | 7               | 7                  |
| Other                   | 15                 | 9               | 5               | N/A             | 24                 |
| <i>Unweighted bases</i> | <i>158</i>         | <i>131</i>      | <i>226</i>      | <i>174</i>      | <i>2122</i>        |

Q15/Q16



## Additional formal training

### *Self-assessment of basic skills needs*

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

Overall, 1 in 10 construction workers in Wales believe they would benefit from some form of training in basic skills (10% cf. 18% in 2015 and 15% in 2012). The 2018/19 proportion in Wales is similar to the UK 2018/19 average (11%).

In terms of the type of training required, there is an almost even split across reading and writing, with fewer believing they would benefit from training in speaking English and more believing that further training in Maths would be beneficial, as Figure 31 summarises.

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

*Base: All respondents*

|                         | <b>WA 2018/19</b> | <b>WA 2015</b> | <b>WA 2012</b> | <b>WA 2007</b> | <b>UK 2018/19</b> |
|-------------------------|-------------------|----------------|----------------|----------------|-------------------|
|                         | %                 | %              | %              | %              | %                 |
| ANY                     | 10                | 18             | 15             | 11             | 11                |
| Reading                 | 3                 | 8              | 6              | 7              | 5                 |
| Writing                 | 4                 | 6              | 4              | 7              | 5                 |
| Speaking English        | 1                 | 3              | 3              | 4              | 6                 |
| Maths                   | 8                 | 13             | 10             | 6              | 5                 |
| <i>Unweighted bases</i> | <i>287</i>        | <i>290</i>     | <i>428</i>     | <i>293</i>     | <i>4048</i>       |

Q37

Younger workers aged 16 to 19 are more likely to believe they would benefit from some training in basic skills (21% cf. 1% aged 45+). Bricklayers (14%), labourers/general operatives (12%) and plant/machine operatives (12%) are also more likely to believe this is the case.



### Current study for additional construction qualifications

Overall, 11% of all construction workers in Wales are currently working towards a formal qualification relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 12% in 2015, 13% in 2012 and a UK average in 2018/19 of 15%.

As in previous surveys, the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (26% of 16 to 24 year olds) and amongst those who have worked within the construction industry for less than a year (32%). Workers employed directly (15%) are also more likely than those who are self-employed (5%) or working through an agency (8%) to be currently working towards a qualification. Of those who have no qualifications, currently 10% are working towards one but the proportion is higher amongst those with Level 1 qualifications (44%). Figure 32 summarises these findings.

**Figure 32: Proportion working towards additional construction qualifications**

*Base: All respondents \*caution: low sample bases*

|                                                          |                                 | WA<br>2018/19<br>% | WA<br>2015<br>% | WA<br>2012<br>% | WA<br>2007<br>% | UK<br>2018/19<br>% |
|----------------------------------------------------------|---------------------------------|--------------------|-----------------|-----------------|-----------------|--------------------|
| Total (287)                                              |                                 | 11                 | 12              | 13              | 19              | 15                 |
| Age                                                      | 16 to 19 years* (17)            | 53                 | 60              | 65              | 57              | 55                 |
|                                                          | 20 to 24 years (36)             | 14                 | 23              | 25              | 35              | 24                 |
|                                                          | 25 to 44 years (140)            | 11                 | 11              | 13              | 12              | 14                 |
|                                                          | 45+ years (88)                  | 2                  | 2               |                 |                 | 6                  |
| Length of<br>time in<br>construction                     | <1 year in construction<br>(22) | 32                 | 30              | 60              | 44              | 38                 |
|                                                          | 1 to 2 years* (11)              | 0                  | 50              | 47              | 47              | 31                 |
|                                                          | 2 to 5 years (45)               | 24                 | 20              | 38              | 48              | 25                 |
|                                                          | 5+ years (208)                  | 7                  | 6               | 7               | 10              | 9                  |
| Contract type                                            | Employed directly (144)         | 15                 | 15              | N/A             | N/A             | 20                 |
|                                                          | Self-employed (116)             | 5                  | 8               | N/A             | N/A             | 9                  |
|                                                          | Agency (24)                     | 8                  | 6               | N/A             | N/A             | 11                 |
| Highest<br>qualification<br>level                        | None (90)                       | 10                 | 11              | N/A             | N/A             | 16                 |
|                                                          | Level 1* (9)                    | 44                 | 38              | N/A             | N/A             | 27                 |
|                                                          | Level 2 (56)                    | 13                 | 20              | N/A             | N/A             | 12                 |
|                                                          | Level 3 (50)                    | 6                  | 7               | N/A             | N/A             | 14                 |
|                                                          | Level 4+* (6)                   | 0                  | 5               | N/A             | N/A             | 21                 |
| <i>Unweighted bases for 2018/19 Wales in parentheses</i> |                                 |                    |                 |                 |                 |                    |

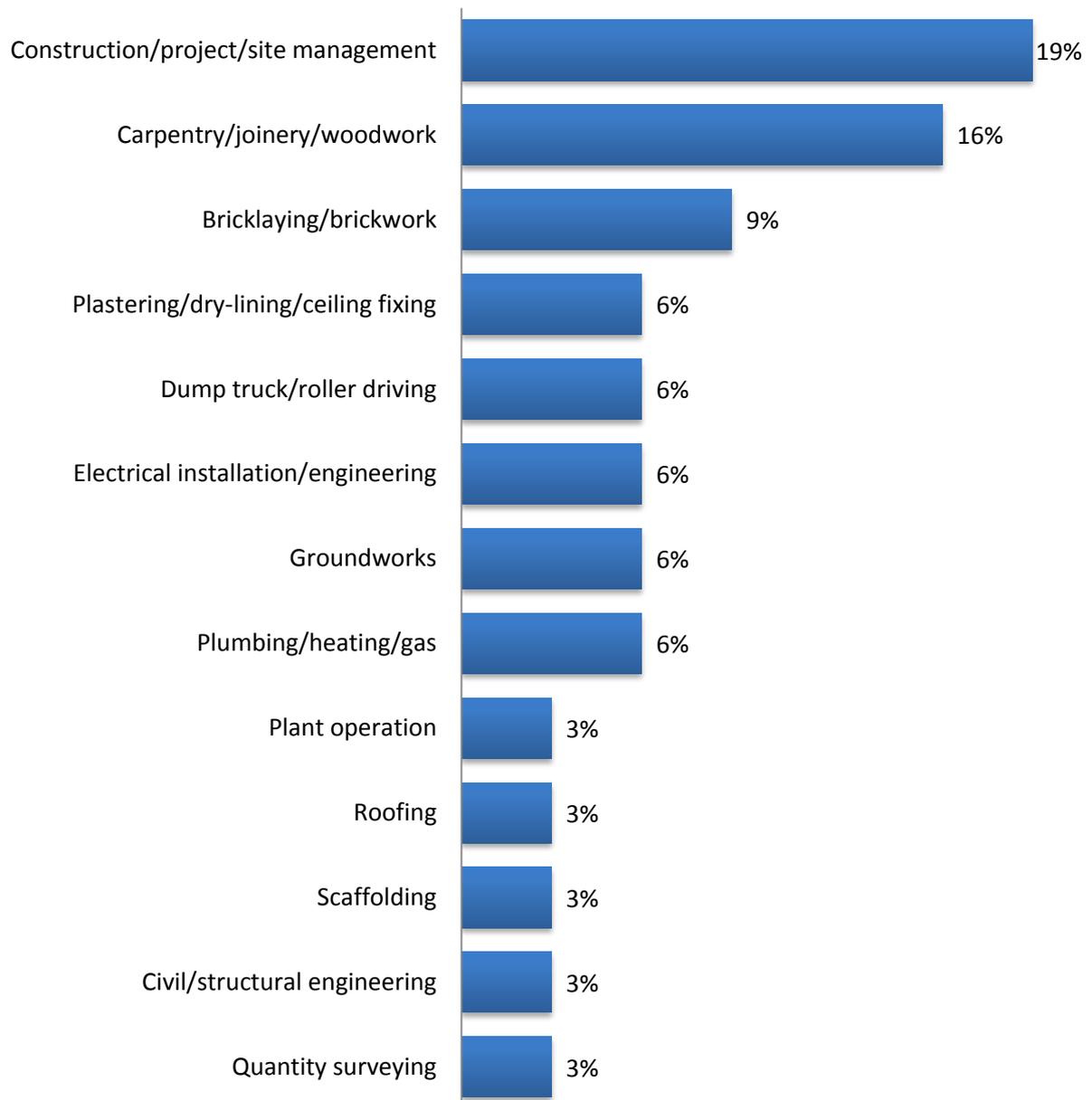
Q18



Of those who are currently studying for a qualification, the most popular type of qualification is an NVQ/SVQ (66%). In terms of the subject of the qualifications being worked towards, construction/project/site management (19%), followed by carpentry/joinery/woodwork (16%) and bricklaying (9%) are most popular, as Figure 33 illustrates.

**Figure 33: Subject of qualification being worked towards**

*Base: Where working towards a qualification*



*Unweighted base = 32 Q19*



## Supervisory and managerial qualifications and training

As reported earlier, a fifth of all construction workers in Wales perform a supervisory or management role at their site (20%). Amongst those who do not currently perform supervisory/management roles, 1 in 7 want to become a supervisor or manager in the future but have not done it before (14%) and a further 5% want to be a supervisor/manager and have done it before. Around a fifth of all workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (22%), while a further three-fifths are certain that they do not want to be (59%).

The likelihood that workers want to be supervisors/managers also diminishes amongst those that have worked in the industry for at least 5 years, with 65% of those having worked in construction for 5+ years not wishing to be supervisors/managers, compared with a Wales average of 59%. Analysis by contract type reveals that those who are currently self-employed or work for an agency are slightly more likely than those employed directly to want to be a supervisor/manager including those who have done it before (20%, 21% and 18% respectively).

**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*

|                                 |                   | Unweighted bases | Yes, but have not done it before % | Yes and have done it before % | No % | Maybe/depends % |
|---------------------------------|-------------------|------------------|------------------------------------|-------------------------------|------|-----------------|
| Wales                           |                   | 220              | 14                                 | 5                             | 59   | 22              |
| UK                              |                   | 2824             | 24                                 | 6                             | 51   | 20              |
| Age                             | 16 to 19 years    | 17               | 18                                 | 0                             | 29   | 53              |
|                                 | 20 to 24 years    | 35               | 26                                 | 0                             | 49   | 26              |
|                                 | 25 to 44 years    | 103              | 16                                 | 7                             | 52   | 25              |
|                                 | 45+ years         | 60               | 5                                  | 5                             | 82   | 8               |
| Length of time inc construction | <1 year           | 22               | 23                                 | 0                             | 50   | 27              |
|                                 | 1 to 2 years      | 11               | 18                                 | 0                             | 45   | 36              |
|                                 | 2 to 5 years      | 43               | 19                                 | 0                             | 47   | 35              |
|                                 | 5+ years          | 143              | 11                                 | 7                             | 65   | 17              |
| Contract type                   | Employed directly | 103              | 16                                 | 2                             | 59   | 23              |
|                                 | Self-employed     | 92               | 12                                 | 8                             | 59   | 22              |
|                                 | Agency            | 23               | 17                                 | 4                             | 65   | 13              |
| Highest qualification level     | No Qualifications | 80               | 15                                 | 3                             | 61   | 21              |
|                                 | Level 1*          | 9                | 11                                 | 0                             | 44   | 44              |
|                                 | Level 2           | 49               | 18                                 | 6                             | 49   | 27              |
|                                 | Level 3           | 33               | 21                                 | 6                             | 55   | 18              |
|                                 | Level 4+*         | 0                | 0                                  | 0                             | 0    | 0               |



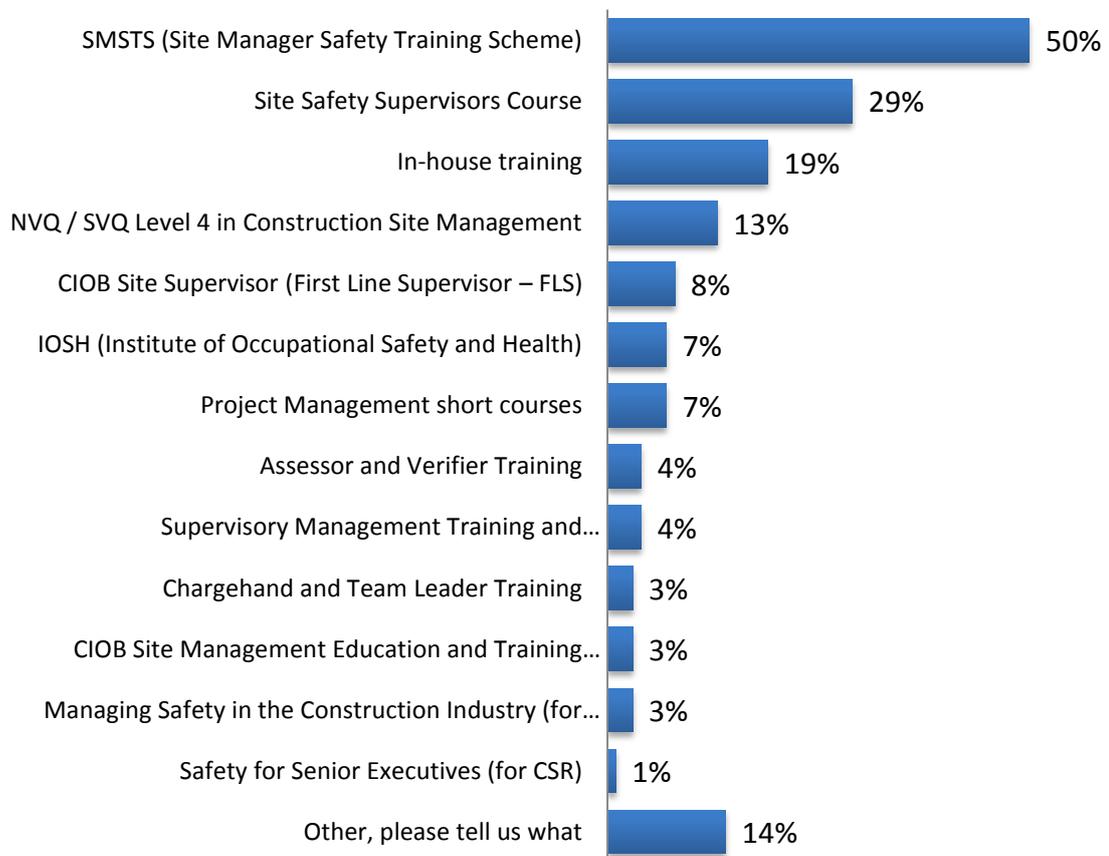
One in four construction workers in Wales (25%; 34% across the UK) and more than three-quarters of those who have had some form of supervisory or management responsibilities (77% cf. 84% in 2015, 50% in 2012 and 81% across the UK in 2018/19) have received any formal training designed to improve managerial or supervisory knowledge or skills.

The proportion that has undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years than those that have worked in the sector for less time (33%, compared with 5%). Construction workers employed directly are four times as likely as agency workers to have received formal training in this area (32%, compared with 8%). All site managers in the sample have received formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken, the proportions mentioning each type are summarised in Figure 35. SMSTS is most frequently mentioned (50%), with 3 in 10 of those that have received training mentioning Site Safety Supervisors Courses (29%) and 1 in 5 that have received in-house training (19%). These three were also the three most frequently mentioned in 2015, although in 2015 in-house training was in first place (45%).

**Figure 35: Types of managerial/supervisory training undertaken**

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



Unweighted base = 72 Q11



## Overall skill levels

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

As in previous surveys, the vast majority of construction workers in Wales (95%) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 5% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

A quarter of the workforce (24%) holds a skill card/certificate, but have no other construction qualification. This is lower than in 2015 (32%) and 2012 (42%).

**Figure 36: Qualification status summary**

*Base: All respondents*

|                                                                                                           | <b>WA<br/>2018/19<br/>%</b> | <b>WA<br/>2015<br/>%</b> | <b>WA<br/>2012<br/>%</b> | <b>WA<br/>2007<br/>%</b> | <b>UK<br/>2018/19<br/>%</b> |
|-----------------------------------------------------------------------------------------------------------|-----------------------------|--------------------------|--------------------------|--------------------------|-----------------------------|
| Holds a formal construction qualification or a skills card/certificate or working towards a qualification | 95                          | 96                       | 95                       | 94                       | 99                          |
| Holds a formal construction qualification or a skills card/certificate                                    | 95                          | 96                       | 95                       | 90                       | 98                          |
| Holds a skills card/certificate                                                                           | 92                          | 92                       | 92                       | 82                       | 97                          |
| Holds a skills card/certification but no other qualification                                              | 24                          | 32                       | 42                       | 30                       | 22                          |
| Working towards a qualification                                                                           | 11                          | 12                       | 13                       | 19                       | 15                          |
| <i>Unweighted bases</i>                                                                                   | <i>411</i>                  | <i>290</i>               | <i>428</i>               | <i>293</i>               | <i>4048</i>                 |



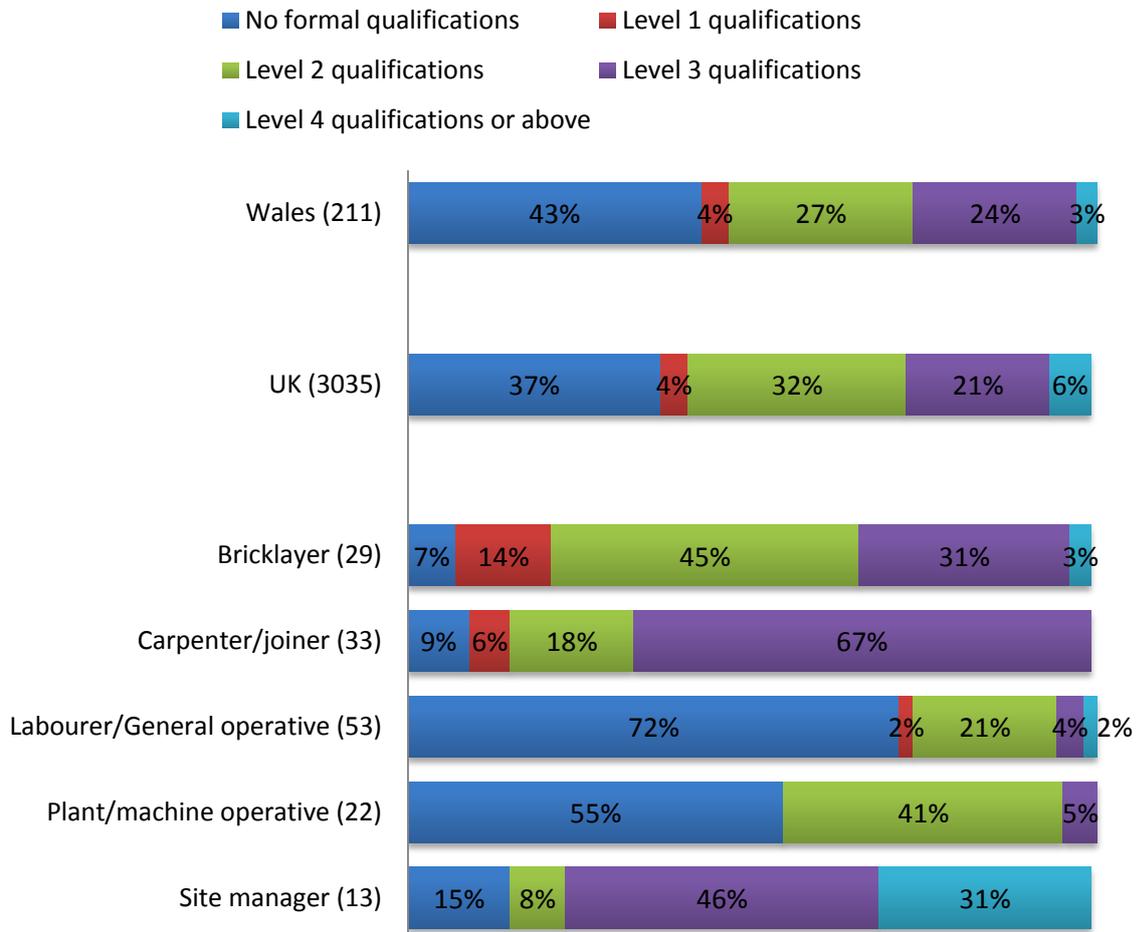
Based on all questions relating to qualifications, it is possible to calculate each worker's highest qualification level. Figure 37 summarises construction workers' highest level of qualification, overall and by occupation, based on where the information provided enabled a level to be assigned (26% of all construction workers in Wales did not provide sufficient information).

Overall, more than half of construction workers in Wales providing a response have qualifications equivalent to Level 2 or above (53%, cf. 53% in 2015; 59% across the UK in 2018/19).

By occupation, site managers (providing a response) are most likely to hold the highest level of qualifications; a third hold qualifications at Level 4 or above (31%). Carpenters/joiners (67%) and bricklayers (31%) are more likely than other occupations to hold qualifications equivalent to Level 3.

**Figure 37: Current qualification level, by occupation**

*Base: All respondents who provided a valid response*



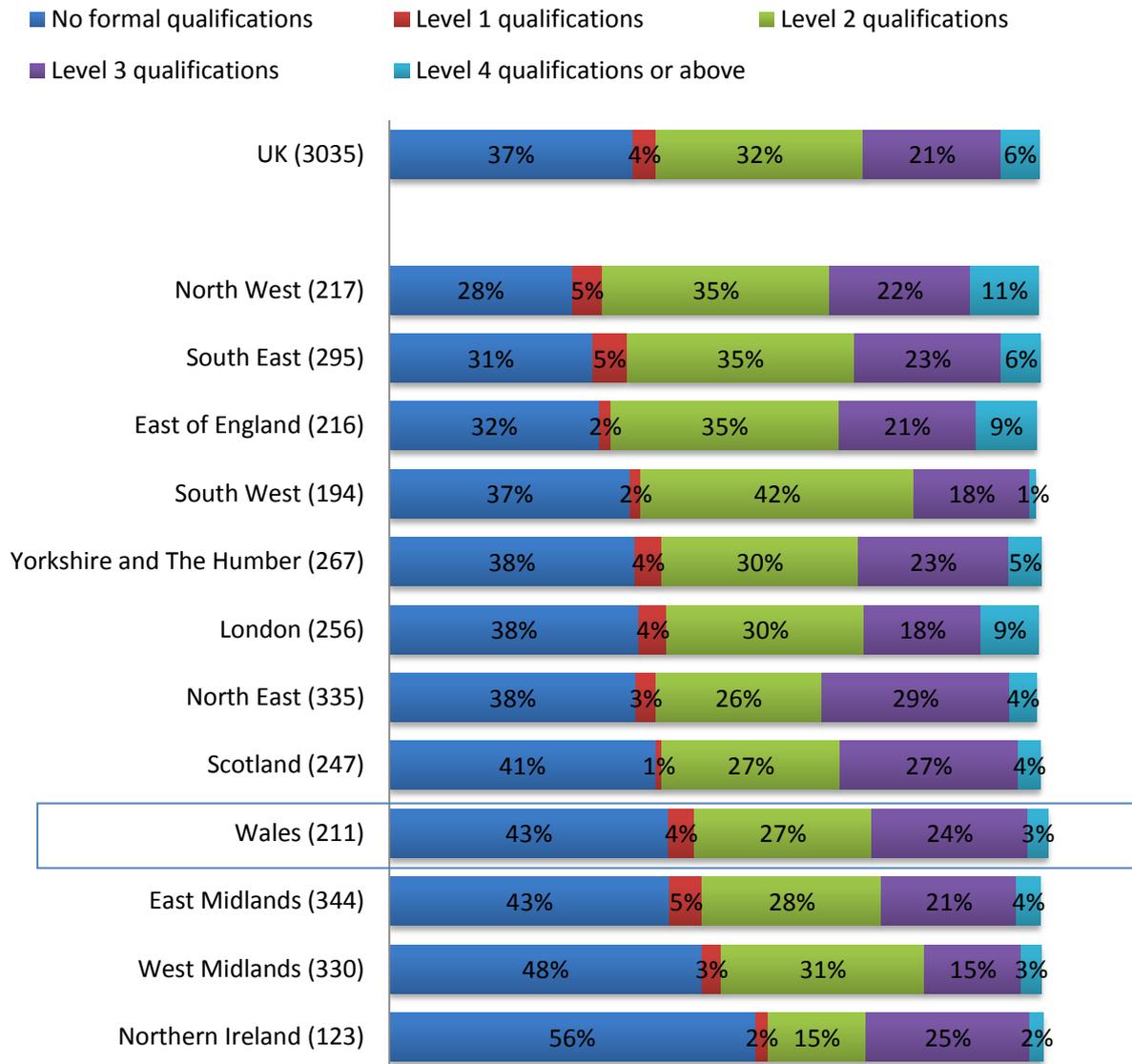
*Unweighted bases in parentheses Q15/Q16*



Analysis by region/nation reveals that while the proportions that hold qualifications at Level 1 or at Level 4 and above, are generally quite similar, the proportions that have Level 2 or 3 qualifications and no qualifications vary quite considerably. These variances are summarised in Figure 38, which highlights that the construction workforce in Wales is a little below average across 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, workers that have worked in construction for 5+ years are more likely than those having spent less time in the industry to have qualifications at Level 3 or 4+ (33%, compared with 15% that have less than 5 years experience).

In terms of contract type, the self-employed are more likely to have qualifications compared with workers who are employed directly by a company (69% cf. 55%); and the majority of agency workers do not have any qualifications (76%). The self-employed are slightly more likely than those that are employed to have level 3 or above qualifications (32% cf. 29%) and none of the agency workers have qualifications at this level. Figure 39 illustrates these variances and levels of qualifications held by other key variables.

**Figure 39: Current qualification level, by other key variables**

Base: All respondents who provided a valid response



Unweighted bases in parentheses Q15/Q16



## Geographic mobility

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

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

## Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. Within Wales, the most likely reason for working in the region/nation is because they grew up there/have always lived there (57%) and this is a more significant reason for choosing location in Wales than across the UK as a whole (43%), although it is mentioned by fewer construction workers in Wales this year than previously (63% in 2015). Two-fifths of workers in Wales gave the reason that their employer sent them there (40%). This reason is given by a higher proportion of workers than in 2015 (29% in 2015) and is less frequently mentioned than the UK average (51%).



**Figure 40: Reasons for choosing to work in current location**

*Base: All respondents*

|                                                                                                           | <b>WA<br/>2018/19<br/>%</b> | <b>WA<br/>2015<br/>%</b> | <b>UK<br/>2018/19<br/>%</b> |                            | <b>WA<br/>2012<br/>%</b> |
|-----------------------------------------------------------------------------------------------------------|-----------------------------|--------------------------|-----------------------------|----------------------------|--------------------------|
| You grew up here/have always lived here                                                                   | 57                          | 63                       | 43                          | Family                     | 61                       |
| Family reasons                                                                                            | 6                           | 7                        | 5                           |                            |                          |
| Employer sent you here                                                                                    | 40                          | 29                       | 51                          | Employer sent me           | 30                       |
| Came to the area to take up this or another job                                                           | 1                           | 2                        | 3                           | More regular opportunities | 5                        |
| Wanted to move to the area because you like it or feel it offers opportunities for better quality of life | 1                           | <0.5                     | 2                           | Prefer living here         | 5                        |
| There are more jobs available in this area                                                                | <0.5                        | 2                        | 5                           | More jobs here             | 6                        |
| Construction work is better paid in this area                                                             | <0.5                        | 1                        | 3                           | Better paid jobs           | 2                        |
| Better promotional prospects in this area                                                                 | <0.5                        | 0                        | 1                           | More chance of promotion   | 0                        |
| <i>Unweighted bases</i>                                                                                   | <i>287</i>                  | <i>290</i>               | <i>4048</i>                 |                            | <i>428</i>               |

Q28

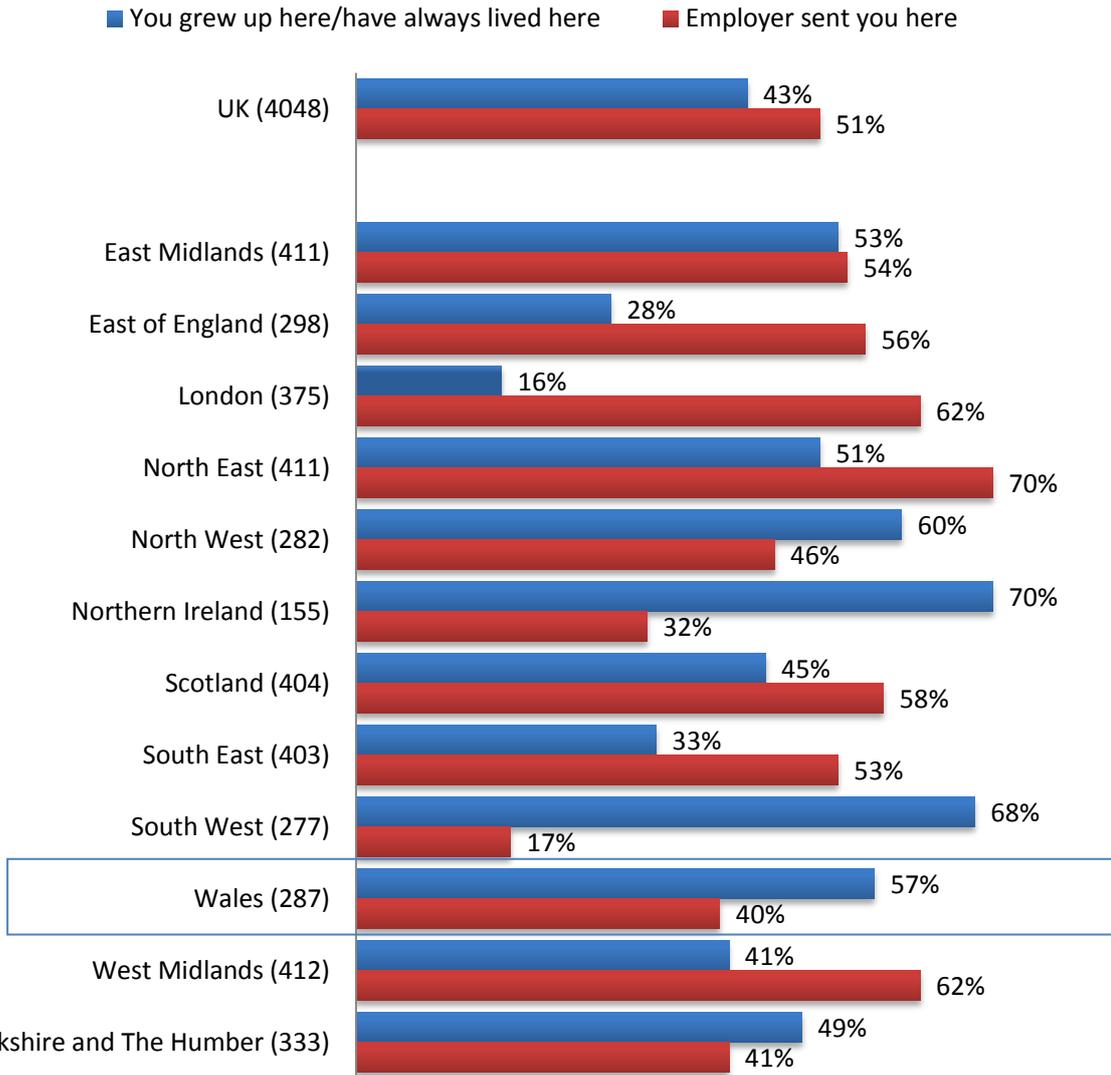
Workers over the age of 60 are more likely than younger workers to state that they work in their current location because their employer sent them there (53%, compared with 38% of 16 to 59 year olds), but this is based on a small sample.



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

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

Base: All respondents



Unweighted bases in parentheses Q28



Three-fifths of construction workers in Wales have worked within this region for their entire construction career (60%), compared with a lower proportion in 2015 (51%) and 2012 (40%). Most of the remainder have worked in the region for most of their career (29%).

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

*Base: All respondents*

|                                                                                | <b>WA<br/>2018/19<br/>%</b> | <b>WA 2015<br/>%</b> | <b>WA<br/>2012<br/>%</b> | <b>WA<br/>2007<br/>%</b> | <b>UK<br/>2018/19<br/>%</b> |
|--------------------------------------------------------------------------------|-----------------------------|----------------------|--------------------------|--------------------------|-----------------------------|
| All of your time                                                               | 60                          | 51                   | 40                       | 39                       | 44                          |
| Most of it                                                                     | 29                          | 34                   | 37                       | 37                       | 33                          |
| Around half your time                                                          | 6                           | 7                    | 10                       | 12                       | 9                           |
| A small proportion of your time                                                | 3                           | 6                    | 11                       | 9                        | 10                          |
| Only on this job (this is the first site you've been to in this region/nation) | 1                           | 1                    | 2                        | 1                        | 2                           |
| Don't know                                                                     | 1                           | 1                    | <0.5                     | 2                        | 1                           |
| <i>Unweighted bases</i>                                                        | <i>287</i>                  | <i>290</i>           | <i>428</i>               | <i>293</i>               | <i>4048</i>                 |

Q26/Q27

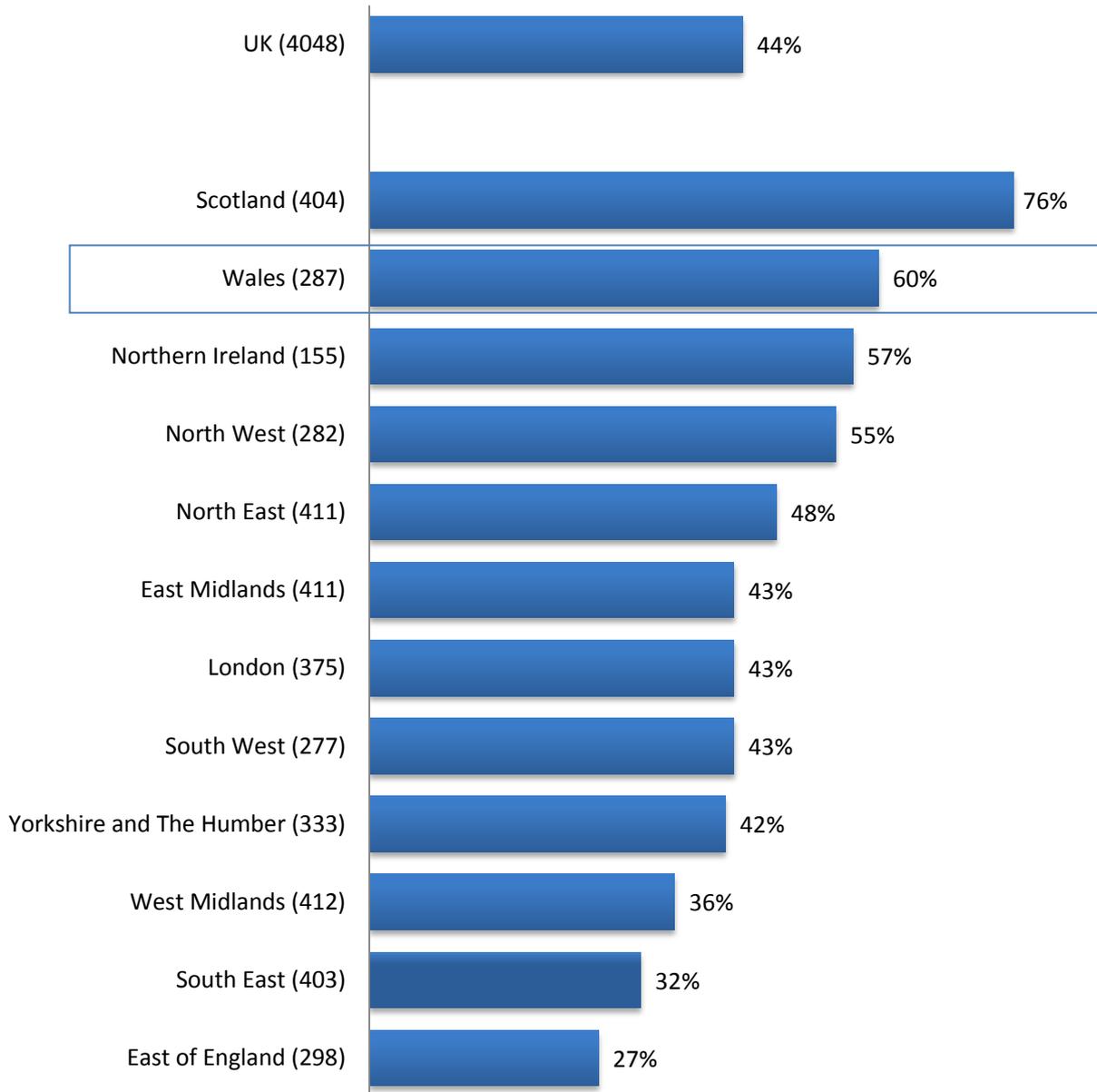
The proportion of construction workers in Wales that have spent all of their time in the region is higher amongst younger workers (82% of 16 to 19 year olds and 75% of 20 to 24 year olds) and similarly high amongst those that have worked in the construction industry for the shortest period of time (82% of those that have worked in the industry for less than a year).



Compared with construction workers in other regions/nations, those in Wales are amongst the most likely to have spent all their construction career in their region/nation.

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

*Base: All respondents*



*Unweighted bases in parentheses* Q26



The proportion of workers that reported their employer operates (takes on construction contracts) only within particular regions/nations, nationwide or internationally is shown in Figure 44. In Wales, just under half (45%) indicate their employer operates nationwide, with just over half (53%) indicating that their employer operates in particular parts of the UK including Wales, while 2% are unsure.

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

Base: All respondents

\*denotes less than 0.5%

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

Q25



## Region/nation worked in before current site

Thinking about the last construction site they worked on, before this one, in the majority of cases, workers' last sites were in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 45 illustrates. As in 2015, construction workers in Wales are amongst those most likely to state that their last site was in the same region/nation (88%), and the proportion is higher than in 2015 (83%).

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

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

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

Q32



## Worker origins

Workers were asked which region/nation they were living in just before they got their first job in construction in the UK. Overall, more than 9 in 10 construction workers in Wales were living in Wales when they started their construction career (93% cf. 94% in 2015). This compares with similarly high proportions in the other nations (Scotland at 96%; Northern Ireland at 95%) and significantly lower proportions in some English regions (East of England at 44%; South East at 51%). Figure 46 summarises this data.

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

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

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

Q40



Thinking next about where workers studied for their first construction qualification, Figure 47 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that more than four-fifths of construction workers in Wales (86%) achieved their first qualification there.

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

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

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

Q17



## Travel to site

### Relative locations of current workplace to home

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

Just 2% of construction workers in Wales are travelling into the region for work from another region/nation in which their current residence is based and this is a lower proportion than in previous surveys (7% in 2015 and 9% in 2012).

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

Base: All respondents who provided a valid response

|                                | 2018/19                   |                                |                                   | 2015                      |                                |                                   |
|--------------------------------|---------------------------|--------------------------------|-----------------------------------|---------------------------|--------------------------------|-----------------------------------|
|                                | % from same region/nation | % from different region/nation | % from neighbouring region/nation | % from same region/nation | % from different region/nation | % from neighbouring region/nation |
| Northern Ireland (145)         | 100                       | 0                              | -                                 | 99                        | 1                              | -                                 |
| Scotland (196)                 | 100                       | 0                              | 0                                 | 96                        | 4                              | 0                                 |
| <b>Wales (258)</b>             | <b>98</b>                 | <b>2</b>                       | <b>2</b>                          | <b>93</b>                 | <b>7</b>                       | <b>5</b>                          |
| North East (335)               | 96                        | 4                              | 4                                 | 97                        | 3                              | 1                                 |
| North West (257)               | 94                        | 6                              | 6                                 | 88                        | 12                             | 12                                |
| South West (243)               | 94                        | 6                              | 6                                 | 85                        | 15                             | 11                                |
| East Midlands (309)            | 90                        | 10                             | 10                                | 74                        | 26                             | 23                                |
| Yorkshire and the Humber (290) | 88                        | 12                             | 9                                 | 86                        | 14                             | 14                                |
| West Midlands (308)            | 80                        | 20                             | 19                                | 82                        | 18                             | 16                                |
| London (341)                   | 63                        | 37                             | 32                                | 71                        | 29                             | 25                                |
| East of England (270)          | 61                        | 39                             | 36                                | 63                        | 37                             | 27                                |
| South East (362)               | 54                        | 46                             | 42                                | 58                        | 42                             | 38                                |

Unweighted bases for 2018/19 in parentheses

Q52/Q54



The extent to which construction workers live in the same region/nation in which they work is further illustrated in Figure 49. Nearly all construction workers in Wales are currently living in Wales (98%), which compares with 93% in 2015. The majority of those that are travelling from a different region are living in the South West of England (2%), a neighbouring region.

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

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

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

Q52/Q54

### Furthest distance worked in last 12 months

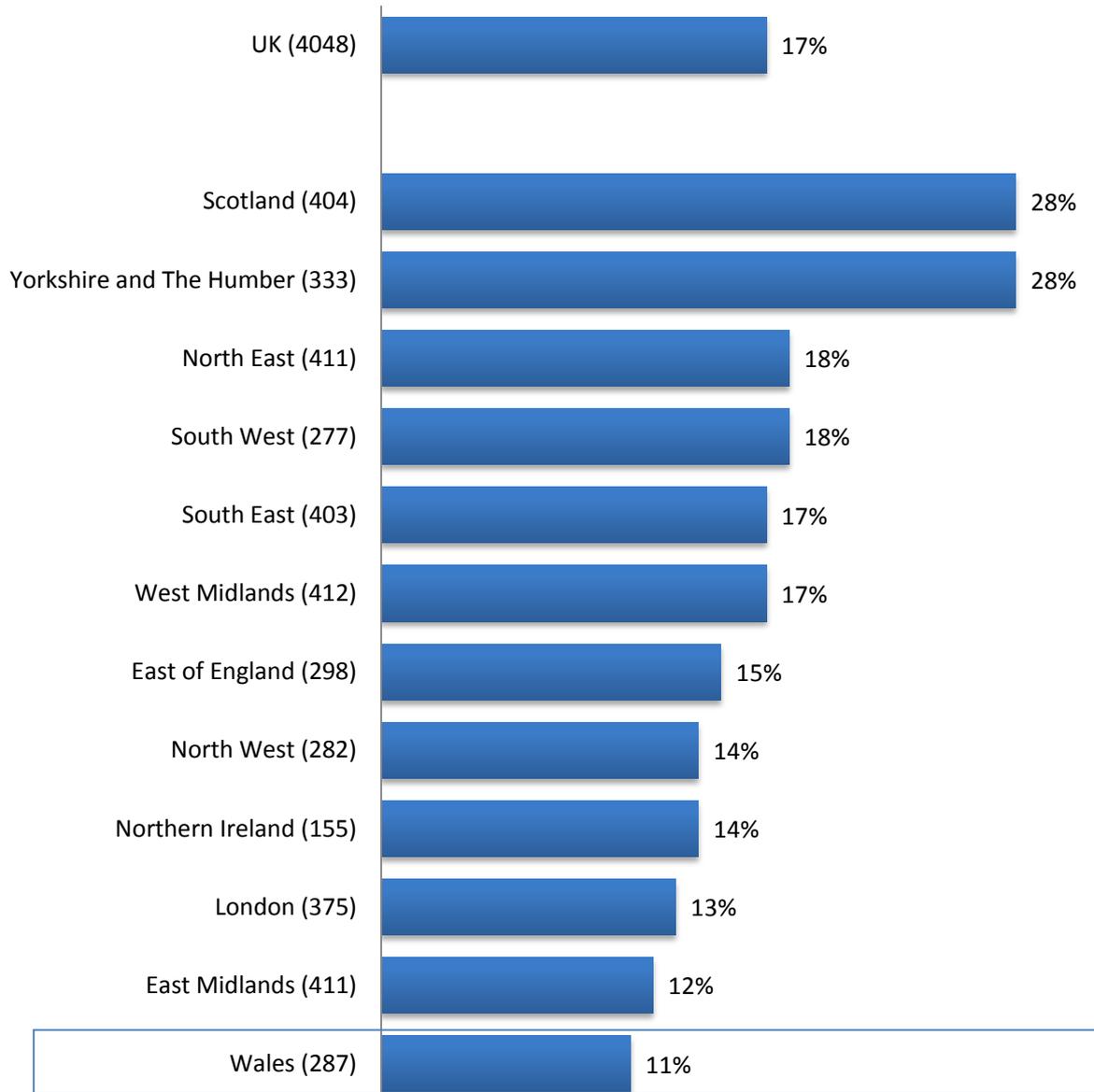
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within Wales, 3 in 10 construction workers have worked no more than 20 miles away (29%) and just over 1 in 3 have worked between 21 and 50 miles away (35%). The average maximum distances travelled to work by construction workers in Wales in 2018/19 were shorter than in 2015 when 18% had never worked more than 20 miles from their home, and 40% had never travelled further than between 21 and 50 miles to work. This leaves 1 in 3 that have worked more than 50 miles away from their permanent home (32%), with 1 in 5 that have worked between 51 and 100 miles away (21%) and 1 in 9 that have worked more than 100 miles away (11%).

Compared with workers in other regions/nations, workers based in Wales are the least likely (11%) 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* Q29



## Use of temporary accommodation

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

**Figure 51: Percentage of workers in temporary accommodation**

Base: All respondents

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

Q41/Q42

## Journey distance to work

Within Wales, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 16 miles, which is the same as reported in 2015 but lower than that reported in 2012 (26 miles). The Wales mean compares to a mean of 18 miles across the UK.

More than a third of those providing a response (38%) travel less than 10 miles from their current residence to the site they work, whilst another third (33%) travel between 10 and 19 miles, more than a quarter (28%) travelled between 20 and 49 miles. Fewer than 0.5% travelled between 50 and 99 miles and fewer than 0.5% travelled more than 100 miles.

## Site duration and change

### Expected site/phase duration

All construction workers who are currently employed on a temporary basis (26% of all construction workers in Wales) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 15% expect to work for another week or so, or less; 3% anticipate between 2 and 3 weeks; 3% expect another month; 5% between a month and 3 months; 11% between 3 and 6 months; 11% between 6 months and



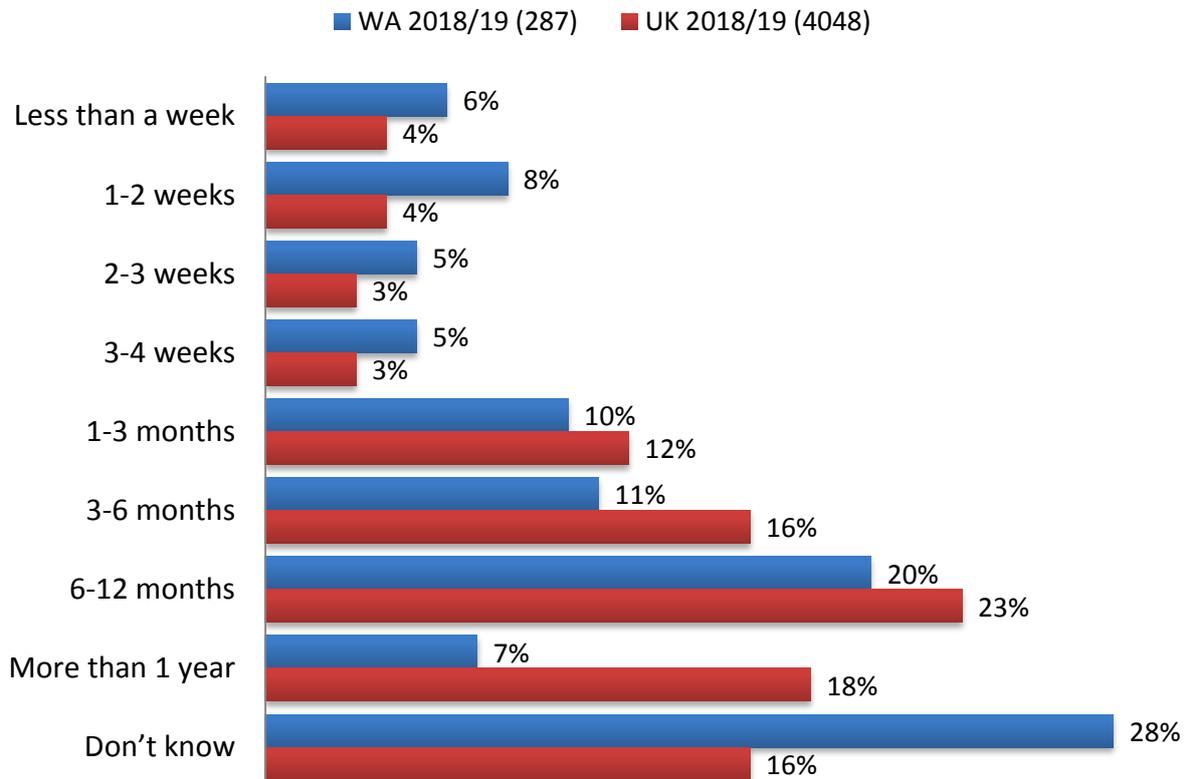
a year, and 4% expect to still be working for their current company/agency in more than a years' time. Half of the temporary workers in Wales did not know how much longer they could expect to be working for their current company/agency (49%; 38% across the UK).

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 construction workers in Wales (24% cf. 21% in 2015 and 13% in 2012) expect to work on that site for less than a month, including 6% that only expect to be there for a week or less. Two-fifths anticipate being on site for more than a month but less than a year (41%), while only 7% expect to stay on that site for a year or longer, which is a significant decrease compared with 2015 (38%) and 2012 (26%). It compares with a UK average in 2018/19 of 18%. However, in more than a quarter of cases (28% cf. 20% in 2015 and 32% in 2012) workers did not know how much longer they could expect to be on site, indicating that a significant minority of construction workers are living with a certain amount of uncertainty and insecurity.

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

Base: All respondents



Unweighted bases in parentheses  
Q24

The youngest workers, aged 16-24 are also significantly more likely to be unsure of how much longer they can expect to work on their present site (40% don't know).



Amongst the various trades/job roles, site managers are more likely to indicate that they expect to work at that site for more than a year (20%); whilst bricklayers (none), labourers/general operatives (2%) and carpenters/joiners (5%) are least likely to indicate that this is the case.

### Expected next site location

More than three-quarters of all construction workers in Wales are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis, and this is a higher proportion than in previous surveys (77% cf. 71% in 2015 and 74% in 2012). The remaining workers are sure that this will not be the case (2%); that it depends where the work is (13%); or that they don't know (7%).

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

Workers that are certain that their next job will not be within commuting distance of their permanent home were asked to indicate which region/nation they expect to be working in next. The following figure summarises their responses by region/nation (although the base sizes within each region/nation are very small, so some caution is needed) and it gives an indication of the likely pattern of movement between regions/nations. Just over two-fifths of construction workers in Wales (43%) that do not expect to be able to commute daily to their next job expect to remain in the nation for their next job. The only other region/nation mentioned is London (29%).

**Figure 53: Expected location of next site/job**

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

\* denotes less than 0.5%

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

Q31



## Sub-sector and sector mobility

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

### Sub-sector mobility

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

Following on from 2015, the vast majority of construction workers in Wales have worked on new housing (82% cf. 86% as in 2015). Compared with 2015, there has been an increase in the proportions of construction workers that have been working on other types of projects, (which has brought these proportions back up to those reported in 2012).

Overall, 3 in 10 construction workers have only worked on one project type (29%), a significant decrease on 2015 (63%). This suggests greater mobility between projects in the sector.

**Figure 54: Type of projects spent significant periods on**

*Base: All respondents*

|                                                                                                       | WA<br>2018/19<br>% | WA 2015<br>% | WA 2012<br>% | WA 2007<br>% | UK<br>2018/19<br>% |
|-------------------------------------------------------------------------------------------------------|--------------------|--------------|--------------|--------------|--------------------|
| New housing                                                                                           | 82                 | 86           | 81           | 67           | 79                 |
| Housing repair and maintenance including extensions/loft conversions                                  | 42                 | 22           | 46           | 44           | 46                 |
| Commercial work such as shops, office, pubs etc                                                       | 40                 | 21           | 45           | 59           | 51                 |
| Private industrial work such as factories, warehousing, mechanical engineering, land reclamation      | 31                 | 21           | 36           | 52           | 45                 |
| Public non-housing work such as schools, sports facilities, landscaping                               | 60                 | 18           | 50           | 59           | 51                 |
| Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations | 26                 | 18           | 21           | 31           | 31                 |
| ONE TYPE ONLY                                                                                         | 29                 | 63           | 11           | 22           | 30                 |
| TWO TYPES                                                                                             | 20                 | 12           | 35           | 19           | 16                 |
| THREE TYPES                                                                                           | 15                 | 8            | 19           | 16           | 14                 |
| FOUR TYPES                                                                                            | 15                 | 4            | 11           | 18           | 12                 |
| FIVE TYPES                                                                                            | 10                 | 5            | 10           | 14           | 13                 |
| SIX TYPES                                                                                             | 10                 | 6            | 14           | 10           | 14                 |
| <i>Unweighted bases</i>                                                                               | <i>287</i>         | <i>290</i>   | <i>428</i>   | <i>293</i>   | <i>4048</i>        |

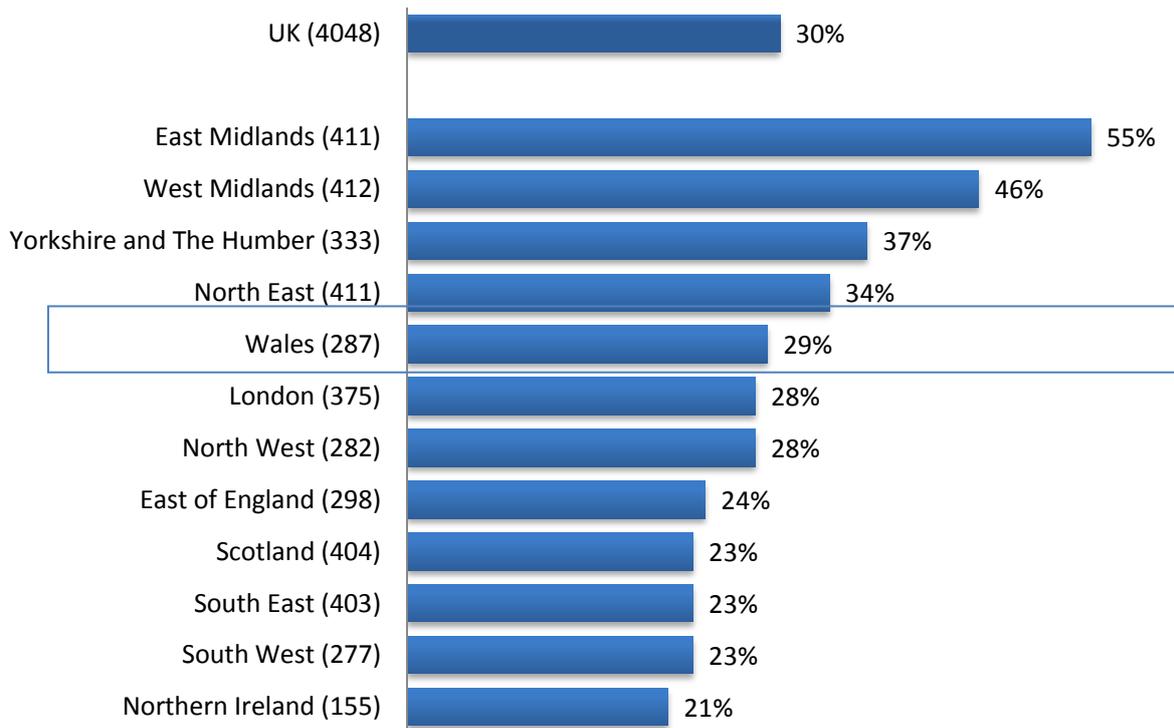
Q3/Q4



The number of project types worked on varies significantly by region/nation, as Figure 55 illustrates. Wales is similar to the UK average in terms of the proportion of its construction workers working on only one project type (29% cf. 30% in the UK).

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

Base: All respondents



Unweighted bases in parentheses Q4

The likelihood that workers have worked only on one project type declines as age increases, (from 59% of 16 to 19 year olds to 22% of 45+ year olds). By current trade/occupation, the proportion is lowest amongst bricklayers (23%) and site managers are most likely to have worked on 5 or 6 project types (40%).

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

Base: All respondents

\*Caution: Small sample base

|                              | Unweighted bases | 1 type % | 2 types % | 3 types % | 4 types % | 5 types % | 6 types % |
|------------------------------|------------------|----------|-----------|-----------|-----------|-----------|-----------|
| Bricklayers                  | 43               | 23       | 21        | 14        | 19        | 9         | 14        |
| Carpenters/joiners           | 38               | 37       | 26        | 11        | 11        | 13        | 3         |
| Labourers/general operatives | 59               | 34       | 24        | 15        | 10        | 12        | 5         |
| Plant/machine operatives     | 34               | 29       | 9         | 18        | 21        | 12        | 12        |
| Site manager                 | 25               | 28       | 8         | 8         | 16        | 20        | 20        |



## Leaving the sector

In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that, in 5 years' time, they will still want to be working in construction. Overall, around three-quarters (73%) felt it was very likely that they would still want to, which is a similar proportion to the UK average (74%). This included, within Wales, around half of construction workers who say they definitely will be (51%) and just over a fifth that think it is very likely (22%), with a further 9% thinking it quite likely. Just 1 in 20 think it is unlikely (6%; 2% quite unlikely; 4% very unlikely); and just 1% say they definitely won't be. Just 2% say they hope to be retired by then, while 9% don't know.

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years time increases to 7% of construction workers aged 45 and over and 40% of those aged 60 and over.

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

*Base: All respondents*

|                         | WA<br>2018/19<br>% | UK<br>2018/9<br>% | Age           |               |               |           |
|-------------------------|--------------------|-------------------|---------------|---------------|---------------|-----------|
|                         |                    |                   | 16 to 19<br>% | 20 to 24<br>% | 25 to 44<br>% | 45+<br>%  |
| Definitely will be      | 51                 | 48                | 53            | 50            | 49            | 55        |
| Very likely             | 22                 | 26                | 12            | 19            | 28            | 17        |
| Quite likely            | 9                  | 11                | 18            | 6             | 9             | 8         |
| Quite unlikely          | 2                  | 2                 | 0             | 0             | 2             | 2         |
| Very unlikely           | 4                  | 2                 | 6             | 14            | 3             | 2         |
| Definitely will not be  | 1                  | 1                 | 0             | 0             | 1             | 3         |
| Hope to be retired      | 2                  | 4                 | 0             | 0             | 0             | 7         |
| Don't know              | 9                  | 5                 | 12            | 11            | 9             | 6         |
| <i>Unweighted bases</i> | <i>287</i>         | <i>4048</i>       | <i>17*</i>    | <i>36</i>     | <i>135</i>    | <i>88</i> |

Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 52% believe they will definitely want to be working in the construction sector, 23% believe it is very likely they will want to be working in the construction sector, and 9% believe it is quite likely they will want to be working in the construction sector. Only 7% 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 2015 (11%) and 2012 (12%).

Overall, 7% of all construction workers in Wales felt it was unlikely that they would still want to work in the construction sector in five years time. These workers were asked the reasons why. They were most likely to cite the fact that they might find more interesting work outside of construction (24%) or that the work would be better paid (19%) or less physical (19%). One in ten each cited using their skills/abilities better outside of construction or that they would find it easier to get work/have more security outside of construction (each 10%).



## The Wales construction workforce 2018-19 summary

Across the wide range of issues covered within the 2018/19 survey there are indications of a more flexible, adaptive working patterns across the UK construction workforce. This is reflected in the findings amongst construction workers in Wales. Within Wales, there has been a decrease in the proportion of workers employed directly by companies, from 66% in 2015 to 50% in 2018/19, and there has been a corresponding increase in the proportion that are self-employed (from 27% in 2015 to 40% in 2018/19). A higher proportion of workers in Wales are employed on a temporary basis in 2018/19 than in 2015 (26%, compared to 19% in 2015).

However, with more flexibility in working patterns comes more uncertainty with regard to the duration of current projects. This is greater in Wales than average across the UK; 49% of temporary workers do not know how long they expect to continue with their current employer/agency, compared with a UK average of 38%. Fewer workers in Wales than the UK average anticipate staying at their current site for at least another year (7%, compared with a UK average of 18%). Within Wales, a higher proportion of workers (both temporary and permanently employed) than in 2015 do not know how much longer they can expect to be on site (28%, compared with 20% in 2015).

There is evidence of less mobility amongst construction workers in Wales, at least with regard to inter-regional mobility. Although the average distance travelled between home and site is similar to the UK average, workers in Wales are less likely than those in any other region/nation to have travelled more than 100 miles from their permanent home to work in the last 12 months (11%, compared with a UK average of 17%).

Construction workers in Wales are more likely than the UK average to have remained in Wales for all or most of their career (89%, compared with a UK average of 77%). They are less likely than average to report that they work at their current site because their employer sent them there (40%, compared with a UK average of 51%). Having always lived there is a relatively more significant reason for working in the region/nation and the vast majority of construction workers in Wales (86%) have remained in the same region/nation in which they undertook their first qualification/training.

Compared with 2015, construction workers in Wales are more likely to be confident that their next job will be at a location that will allow them to travel to work from their permanent home on a daily basis (77%, compared with 71%).

Construction workers in Wales are less likely than they were in 2015 to have worked in just one project area (29%, compared with 63%). This further reflects the trend towards more flexible, adaptive work patterns that is seen overall across the UK.

In terms of skills and qualifications, it is encouraging to note that the vast majority of construction workers in Wales continue to hold some form of skill card or certificate. However, within Wales this proportion is lower than the UK average (92%, compared with 97%) and has changed little in the last 7 years. There are also slightly fewer qualified



workers in Wales compared with the UK (69% and 72% respectively) and fewer workers in Wales as across the UK are working towards a construction qualification in 2018/19 (11%, compared with a UK average of 15%).

One in ten construction workers in Wales in 2018/19 believe they would benefit from training in basic skills (10%), which is lower than in previous years (18% in 2015 and 15% in 2012) but is similar to the UK average (11%).



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