The views expressed by research participants are their own and do not necessarily represent those of their employers.

The study should not be regarded as a policy statement by CITB.

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Study prepared by IFF Research Ltd from a commission by CITB.

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Methodology

A variety of methodologies were used to ensure the study would provide a robust evidence base for CITB, government and policy stakeholders. The methodology closely replicated that used for a similar study conducted by IFF for CITB in 2017. Throughout the report we make comparisons with this earlier study.

Broadly the research was divided into three separate phases:

- Phase 1: a review of current immigration policy, migration statistics and future EU-migration policy;
- Phase 2: qualitative research with a range of audiences, including employers, employment agencies, non-UK workers and industry stakeholders;
- Phase 3: quantitative research with employers, employment agencies and non-UK workers.

Phase 1: Policy Analysis/Review

This phase of the research was conducted by the Institute of Employment Research (IER) at the University of Warwick and City-REDI (Regional Economic Development Institute) at the University of Birmingham, and comprised several elements covering:

- A review of current UK immigration policy, including:
  - A review and synthesis of migration policy documents from the Home Office and the Migration Advisory Committee (MAC), setting out the current position (as at Spring 2018);
  - A review of commentaries on migration policy, with particular reference to the work of the Migration Observatory.
- A review of official migration statistics. This included reviewing published statistical data from the Office for National Statistics (ONS), including the Labour Force Survey (LFS).
- A review of potential future EU-migrant worker policy, including:
  - Recent debates and announcements regarding EU-migrant worker policy;
  - Assessing the implications of different options for controlling EU migrant workers.

Full findings from the Phase 1 policy analysis/review have been reported separately, and are available from CITB on request.
Phase 2: Qualitative interviews

In-depth, qualitative interviews (conducted face-to-face and by telephone) were carried out amongst four audiences (employers, recruitment agencies, non-UK workers and industry stakeholders) during February and March 2018, as detailed below.

Employers

Employers were recruited from the CITB Employer Panel study (a large-scale annual study conducted for CITB by IFF) and screened to ensure that they had at least 10 direct employees and either non-UK workers accounted for 10% of their workforce over the last 12 months or they had employed at least 20 non-UK workers over the last 12 months.

A total of 20 interviews were conducted, covering both the construction trades sector (15 interviews) and professional services employers (5). A spread of business sizes was covered: three were undertaken with employers with 10-49 employees, eight with those employing 50-249 staff and nine with large employers with more than 250 employees. A full summary is provided in Table 1.

Table 1: Qualitative employer sample structure

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10-49</td>
<td>50-249</td>
</tr>
<tr>
<td>Building completion and finishing</td>
<td>2</td>
<td>-</td>
</tr>
<tr>
<td>Civil engineering construction</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Residential/non-residential construction</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Construction of roads and railways</td>
<td>-</td>
<td>1</td>
</tr>
<tr>
<td>Demolition and site preparation</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>Electrical / Plumbing / Installation</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Specialist Construction activities</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Professional Services</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>TOTAL</td>
<td>11</td>
<td>7</td>
</tr>
</tbody>
</table>

Recruitment agencies

Sample for recruitment agencies was sourced through desk research, and screened to ensure that the firms placed individuals into the construction sector on a regular basis. Interviews were conducted with five recruitment agencies. All placed reasonable numbers in construction roles, from around five to twenty-five a week. The agencies interviewed covered a range of specialisms, placing workers into traditional construction as well as professional services roles. They recruited workers for all types of contracts, from short-term placements to permanent positions in the industry. Their geographic coverage varied between specific UK regions and national coverage, with one operating internationally.
Non-UK / migrant workers

Migrant workers were recruited for interview through using individuals who took part in the quantitative research in 2017, as well as snowballing from these contacts. Individuals were screened to check they had been employed or self-employed within the construction sector in the last 12 months and did not hold a UK passport and were not born in the UK.

A total of 10 non-UK workers were interviewed: all were from countries within the EU. The most common nationality amongst our respondent base was Romanian (three), with interviews also achieved with workers from the Netherlands (two), Lithuania (two), Bulgaria, Poland and Russia. Their ages ranged from 23 to 67, although the majority were aged over thirty. All workers had been in the UK for a number of years, from three up to 40 years.

Stakeholders

IFF convened a stakeholder roundtable discussion in February 2018 in central London. It was attended by two construction employers, representatives from the Engineering Construction Industry Training Board (ECITB) and the Federation of Master Builders, and someone who has been involved in forecasting construction labour market data for over 20 plus years, as well as two CITB staff. This element was new to the 2018 study.

Phase 3: Quantitative interviews

Quantitative survey work was undertaken with three different audiences – employers, non-UK workers and employment agencies. The methodological approach for each audience is detailed below.

Employers

Employers were sampled from the CITB Employer Panel supplemented with sample purchased from Market Location. The sample covered employers in Great Britain, and included those operating in professional services as well as traditional construction trades. Employment of non-UK workers was not part of the eligibility criteria for interview. However, to increase the chances of speaking to a sufficient number of employers with experiences of employing non-UK workers, only businesses with 5 or more direct employees across the UK were interviewed. Firms based in London and the South East were also oversampled. The final data was then weighted back to the overall construction employer population (of those with five plus staff) by size and region to ensure findings were representative.

The mainstage fieldwork took place between March and April 2018, and a total of 400 telephone interviews were conducted with employers. Interviews took around 20 minutes to complete.

Table 2 shows the number of interviews conducted with various types of employer (and hence represents the base sizes on which results in the report are based), while Figure 1 shows the weighted profile of employers by size and geography.
Table 2 Profile of employers interviewed for the quantitative stage (unweighted)

<table>
<thead>
<tr>
<th></th>
<th>Number of interviews</th>
<th>Number of interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017</td>
<td>2018</td>
</tr>
<tr>
<td>Direct</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>320</td>
<td>352</td>
</tr>
<tr>
<td>5-9</td>
<td>58</td>
<td>65</td>
</tr>
<tr>
<td>10-24</td>
<td>98</td>
<td>113</td>
</tr>
<tr>
<td>25-49</td>
<td>72</td>
<td>92</td>
</tr>
<tr>
<td>50-99</td>
<td>66</td>
<td>61</td>
</tr>
<tr>
<td>100-249</td>
<td>61</td>
<td>41</td>
</tr>
<tr>
<td>250+</td>
<td>46</td>
<td>28</td>
</tr>
<tr>
<td>Region where based:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>London/ South East / Eastern</td>
<td>179</td>
<td>162</td>
</tr>
<tr>
<td>Midlands / South West</td>
<td>88</td>
<td>109</td>
</tr>
<tr>
<td>North of England</td>
<td>79</td>
<td>87</td>
</tr>
<tr>
<td>Scotland</td>
<td>38</td>
<td>109</td>
</tr>
<tr>
<td>Wales</td>
<td>17</td>
<td>14</td>
</tr>
<tr>
<td>Total</td>
<td>401</td>
<td>400</td>
</tr>
</tbody>
</table>

Figure 1: Weighted profile of employers
Employment agencies

Employment agency sample was free-found using web searches. Any that were contacted that said their organisation placed very few or no individuals into construction were excluded.

A small-scale pilot of 5 interviews was conducted to test the questionnaire. The mainstage fieldwork with employment agencies took place in April 2018, and a total 50 telephone interviews were conducted. Interviews took around 20 minutes to complete.

Non-UK workers

Due to there being no publicly available database of non-UK construction workers, this strand of the quantitative research was particularly challenging. Replicating the approach of the 2017 study, interviews were undertaken at large construction sites, and a total of 16 site visits took place in London and the South East from March to May 2018. Interviews were usually self-completed by workers using tablets, although in a handful of cases respondents completed paper copies of the survey instead.

A link to the survey was also forwarded to a number of employers interviewed for the qualitative stage, with a request to circulate the survey amongst their employees. A small number of responses were received through this route (fewer than 10), in addition to those completed on site.

A total of 244 responses were received from workers born outside the UK and without a UK passport or UK citizenship.

The survey script was translated into Polish and Romanian to encourage wider participation (from the desk research these were known to be the two main countries of origin of migrant workers in the construction sector). In total, 100 interviews were completed in Romanian and 14 in Polish. Interviews took around 5 minutes to complete.

*Given the sampling approach for non-UK workers, in particular that the coverage is just of those working at large construction sites (and with a London focus), results are not fully representative of all those working in the sector and hence results should be treated as indicative rather than fully representative of non-UK construction workers in general.*

Reporting conventions

Throughout the report we use the terms ‘migrants’ and ‘non-UK workers’ interchangeably. By these terms we mean those born outside the UK and not holding a UK passport.
The current picture on the employment of non-UK workers in the UK Construction sector

This chapter summarises employment of non-UK workers within the UK construction sector, combining data from the desk research phase (primarily from the Labour Force Survey (LFS)) and survey data. It looks at the proportion of the workforce that are non-UK, their main countries of birth, and their working patterns. The LFS data presented is for 2017 (the latest data currently available), and comparisons are made with LFS data for 2015 (the latest data available at the time of the 2017 Migration study).

Key points:

- The construction workforce is still mainly British. The latest LFS data (for 2017) shows that the proportion of non-UK workers in the construction industry has increased to 15% (up from 13% in 2015, representing an increase in numerical terms of around 50,000 workers). Half the non-UK workers were born in EU Accession countries (51%, up from 45% in 2015). In London, it remains the case that around half the construction workforce is comprised of migrant workers (52%).

- The quantitative survey of employers found a quarter (25%) were directly employing at least one non-UK worker at the time of the study, in line with finding at the previous wave (24%). (Note the survey of employers excludes very small employers with fewer than five direct employees.)

- The number of Romanian construction workers in the UK has rapidly increased since 2015 (from around 27,000 to just over 63,500), and they have overtaken Polish workers as the largest national group working in the industry. Polish workers represent the second most populous group, and their numbers remained steady since 2015 (at around 57,500). The number of Bulgarian workers significantly increased between 2015 and 2017 (almost doubling to just over 15,000 workers).

- Migrants often work as self-employed, based on entry routes and informal networks; they can move between projects with the ability to flex hours and earn more. Labour Force Survey data from 2017 recorded that more than half (55%) of non-UK workers in construction were self-employed, compared with 36% of the UK born workforce. The proportion of migrant workers from the site-based survey reporting direct employment fell from 52% in 2017 to 26% in 2018.

- The migrant workforce is somewhat younger than average, and this potentially masks the issue posed by an ageing construction workforce. The LFS for 2017 shows that while 32% of those working in construction that were UK born or UK citizens were aged 50 plus, among the non-UK workforce the comparative figure was just 11%.

- Non-UK workers cover a range of occupations including, architects, skilled trades, construction directors/managers/supervisors, machine operatives, engineers, quantity surveyors and support roles, although a greater proportion of migrants were working as general labourers at this wave compared with last year.
The incidence of non-UK workers in the UK construction sector

According to Labour Force Survey (LFS) data, 2.25 million people aged 16 to 64 worked in construction in 2017, an increase of around 150 thousand or 7.1% compared with the 2.1 million working in the sector in 2015. A third of a million (333,700) of these workers were born outside the UK, an increase from the 2015 LFS data, which recorded just over ¼ million (270,653) non-UK born construction workers.

The proportion of the workforce comprised of non-UK workers has increased consistently from the 8% recorded in 2007, though with a temporary fall in 2010, most likely in response to the recession. This trend was maintained between 2015 and 2017, with the proportion of construction workers born outside the UK increasing from 12.6% to 14.5%.

Just over half (51%) of the non-UK construction workers (169,300) were born in EU Accession countries¹ (compared with 45%, or 122,094 individuals, in 2015) representing 7.5% of the total workforce. LFS data show that in 2017 the most common non-UK countries of birth of construction workers were Romania (63.6k), Poland (57.5k), India (18.4k), Lithuania (16.7k) and Bulgaria (15.2k).

Whilst the number of Polish, Indian and Lithuanian workers has remained relatively stable since 2015, the number of Romanian workers and Bulgarian workers have substantially increased. The LFS data shows that approximately 27.0k Romanians were working in construction in the UK in 2015. This number more than doubled by 2017 (to 63.6k), with Romanian workers becoming the most populous non-UK construction worker nationality. Similarly, the number of Bulgarian workers has doubled from 7.3k in 2015 to 15.2k in 2017, as shown in Figure 2.

Figure 2 The composition of the non-UK construction workforce in 2017 compared with 2015 by country (LFS data)

¹ The Accession countries are the 10 countries which joined the EU in 2004, Romania and Bulgaria (who joined in 2007) plus Croatia (who joined in 2013)
As in 2015, while across the UK as a whole the vast majority (85%) of the construction workforce is British, in London LFS data showed that as in 2015, around half the construction workforce (52%) was non-UK. The geographic distribution of the migrant workforce in 2017 remained broadly consistent with 2015.

**Figure 3 Geographical distribution of migrant workers in construction, 2017 (LFS data)**

By sub-sector, the migrant share of the workforce in 2017 was highest in “test drilling and boring”, “construction of bridges and tunnels”, “painting and glazing” and “construction of residential and non-residential buildings” (each 20%–32%).

Just over two-fifths of migrants were in skilled construction and building trades occupations (41%, though down from 49% in 2015), similar to the percentage for UK-born workers (39%). The proportion of non-UK born workers has increased from 2015 in a diverse range of construction professions, such as transport and mobile machine drivers and operatives (5% from 3%), skilled metal, electrical and electronic trades (7% from 5%), science research, engineering and technology professionals (6% from 3%) and corporate managers and directors (9% from 7%).

As shown in Figure 4, the migrant workforce has a somewhat different age profile to their UK born counterparts, and this age distribution has remained consistent with the 2015 LFS findings; migrant construction workers are more likely to be aged 25-34 (37%) or 35-49 (46%) than UK workers (23% of whom are 25-34; 34% are 35-49). By comparison, migrant workers are less likely to be aged 50+ (11% vs. 32% of UK born construction workers), but also less likely to be aged under 25 (6% vs. 12% of UK born construction workers).

In addition to the age profile of non-UK workers as based on LFS data, the chart below also displays the age profile of non-UK construction workers interviewed for this research, both at this wave and the previous wave. Non-UK workers surveyed were largely site-based, and concentrated in London: although broadly similar to the age profile of non-UK workers as recorded on the LFS for 2015, they
were more likely to be aged 25-34 (41%), which may simply reflect a younger profile of the site-based workforce, as in 2017.

Figure 4 Summary comparison of age profile of non-UK vs. UK construction workers (LFS and survey data)

![Age profile comparison table](source)

The employer perspective

Overall, 37% of employers interviewed for the 2018 study (note that to qualify employers had to employ at least five people across the UK) employed non-UK workers (compared to 35% in 2017). A quarter employed any directly (25%, compared to 24% in 2017), and a quarter (25%) employed any indirectly on a self-employed, labour-only sub-contract basis or via an employment agency (up from 20% in 2017). The proportions of survey employers with any non-UK workers working on a self-employed, via an employment agency or on a labour-only sub-contract basis were each similar and in line with 2017 findings (13%, 14% and 9% respectively).

Table 2 Incidence of employing non-UK workers by employer size and sub-sector 2018

<table>
<thead>
<tr>
<th>Age</th>
<th>5-9</th>
<th>10-99</th>
<th>100+</th>
<th>Construction</th>
<th>Professional</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base: all</td>
<td>65</td>
<td>266</td>
<td>69</td>
<td>352</td>
<td>48</td>
<td>400</td>
</tr>
<tr>
<td>Any non-UK</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any directly employed non-UK</td>
<td>34</td>
<td>44</td>
<td>75</td>
<td>37</td>
<td>47</td>
<td>37</td>
</tr>
<tr>
<td>Any non-UK indirectly employed</td>
<td>19</td>
<td>32</td>
<td>63</td>
<td>22</td>
<td>40</td>
<td>25</td>
</tr>
<tr>
<td>Any non-UK</td>
<td>24</td>
<td>26</td>
<td>59</td>
<td>25</td>
<td>29</td>
<td>25</td>
</tr>
</tbody>
</table>
As shown on Table 4, the likelihood of employing non-UK workers was higher among large firms. Professional services firms were more likely to have any non-UK workers directly employed than working on an indirect basis; while for construction firms the balance was roughly even between the two.

Use of non-UK workers varied widely by geography, and remains highest among firms based in London, among whom:

- Almost seven in ten (68%) employed non-UK workers directly (61% in 2017);
- Three-fifths (62%) had non-UK workers working for them on an indirect basis (up from 46% in 2017);
- Four-fifths (81%) used non-UK workers either directly or indirectly.

The balance of employment of EU workers and non-EU workers appears relatively unchanged over the past year. In terms of the proportion of non-UK workers from the EU:

- Among employers with non-UK workers directly employed, 63% said all (52%) or most (11%) of these workers were from the EU (64% in 2017). This is equivalent to 16% of all employers having non-UK workers directly employed that are all or mostly from the EU.
- Among employers with non-UK workers indirectly employed, 58% said all (44%) or most (14%) of these workers were from the EU (53% in 2017). This is equivalent to 14% of all employers having non-UK workers indirectly employed where all or most are from the EU.

The non-UK worker perspective

The vast majority of the non-UK workers interviewed were interviewed at large construction sites in London and the South East. Of the 244 non-UK workers surveyed, almost half (46%) came from Romania, reflecting the increases measured by the 2017 Labour Force Survey data. The remainder came from a wide range of countries including Poland (7%), Bulgaria (6%), Moldova (5%) and Portugal (5%). Three-quarters (74%) were EU (non-UK) passport holders.

As in 2017, non-UK workers operated across a range of roles, including general labourers, carpenters/joiners, plumbers and site supervisors. The proportion of non-UK workers interviewed that were employed as general labourers has increased compared with 2017, from 12% to 20%. Similarly, more employers with any non-UK workers in 2018 than in 2017 reported any of these workers operating as general labourers (40% compared with 22%). Figure 6, shows a comparison of the findings from the employer surveys and non-UK worker surveys across both waves, demonstrating the increase in those doing general labourer roles reported by both groups.
The non-UK workers interviewed in 2018 had moved to the UK more recently than those interviewed in 2017. For example, a quarter had lived in the UK for more than 10 years in 2018 (23%), compared with a third (32%) in 2017.

In other respects, the profile of non-UK workers surveyed remained consistent with the 2017 findings. During their time in the UK, the vast majority (85%, in line with 84% last year) had only (50%) or mainly (35%) worked in construction jobs as opposed to other sectors, and just over half (52%) had changed the occupation or role they work in whilst working in construction in the UK (exactly the proportion found in 2017).

A little over half (56%) of the non-UK workers interviewed said that their first ever construction job was in the UK, broadly in line with 2017 (50%).

Most non-UK workers has construction-specific qualifications (72%, very similar to the 70% found in 2017). However, reflecting the increase in the proportion of migrant workers who had come to the UK relatively recently, and the higher proportion in general labourer roles, results suggest a slightly less qualified workforce, with more than in 2017 having basic / Level 1 qualifications and fewer having degree level qualifications. Results are summarised in the following chart.

Those that had been in the UK for less than three years tended to be less likely to hold any construction qualifications (61%) compared with those who have been in the UK for 3-10 years (80% qualification) or more than 10 years (79%).
As in 2017, almost all (95%) non-UK workers reported that they had received some training in the UK: 93% had received training in regulations for working in construction in the UK. Slightly fewer (82%) had received training to help them to develop their skills.

In terms of working arrangements, almost all (92%) were working full-time (35 hours or more a week), and the vast majority (91%) worked fairly fixed, similar hours each week.

There were changes, however, between the two waves in the types of employment contracts that employees held:

- In 2017, half (52%) were directly employed by a construction firm. In the 2018 research, just a quarter were employed directly (26%), with corresponding increases in the proportions employed through an employment agency (25% compared with 12% in 2017) or on a self-employed basis (44% compared with 29% the previous year).

- Of those directly employed, the proportion holding permanent, open-ended contracts decreased from 83% in 2017 to 56% in 2018. One in five (22%) worked on a casual basis for an employer compared with just 5% in 2017.

The distribution of reported earnings was similar to 2017, although a slightly higher proportion reported weekly take home pay of less than £550 per week (56%) compared with 2017 (46%), again a likely reflection of the greater proportion of migrants holding lower qualifications and being more likely to be employed in general labourer roles this wave.

Findings from the qualitative stage suggest migrants hold mixed views about working on a self-employed basis. Some like the freedom of not being tied down to a single employer, while others felt that this brought pressures, particularly having to constantly chase employers for new work.
Employment agencies

Employment agencies play a significant role in employment in the UK construction sector, and the findings show continued reliance on agencies for recruitment over the last 12 months:

- 14% of employers had non-UK staff working for them via an employment agency at the time of the survey (12% in 2017);
- 25% of non-UK workers interviewed were working via an employment agency (up from 12% in 2017);
- A quarter of employers have employed staff (whether UK or not) via an employment agency in the last 12 months (27%), rising to 80% of firms employing 100+ staff;
- Half (52%) of all non-UK workers interviewed had worked for an employment agency at some point whilst working in construction in the UK (similar to the 48% reported in 2017).

Fifty employment agencies were interviewed at each survey wave (2017 and 2018) as part of this research. Most dealt with other sectors as well as construction, but a quarter specialised in this area (24%). Nearly all (88%) had placed non-UK workers into construction roles in the last 12 months (in line with 2017 figures): nearly all of these had placed EU workers (88%) and two-thirds (68%) had placed workers from further afield in this time.

The agencies interviewed reported placing an average of 15 individuals per week into construction (18 in 2017), though the number varied quite widely and a quarter (26%) placed over 50 a week and two said the figure was over 500 a week. On average:

- 33% of these individuals were from the EU (in line with 30% in 2017); and
- 9% were from outside the EU (again similar to the 5% in 2017).

The single most common role that agencies had placed non-UK workers into in the last 12 months remained general labouring positions (34%, consistent with 36% in 2017), though this was followed by a wide range of construction and professional services roles, including engineers, bricklayers, scaffolders, plumbers, civil engineers, architects, painters/decorators, roofers and plasterers.

A slight majority of employment agencies generally felt that the skills and experience of non-UK workers were comparable with those from the UK looking for work in the same occupations (55%, in line with 59% in 2017). The remainder were divided between those who felt non-UK workers were less skilled (20%) or more skilled (14%) compared against their UK counterparts (the remainder were unsure or felt unable to make a comparison). These findings suggest no significant changes in skill levels have been observed by agencies over the last year, which is reinforced by the finding that two-thirds of agencies said that migrants looking for work at present are as equally skilled as those who were looking for work 12 months ago.
Reasons for using non-UK workers

Key points:

- Employers are responding to the availability of non-UK workers and skills shortages in the UK construction sector; very few are specifically seeking non-UK workers;

- Non-UK workers can add flexibility, speed of response to skills needs, and are often regarded as having a strong work ethic. They fit into the existing construction labour model;

- Cheaper pay rates are not a common or key factor in why employers recruit non-UK workers;

- Migrants’ skills levels are comparable to their UK counterparts and when they are lacking in certain skills, this is usually a temporary issue which is quickly solved;

- Use of non-UK workers has remained relatively stable over the last 12 months.

Motivations for hiring non-UK workers

Almost two-fifths of employers (37%) employed non-UK workers directly or indirectly, very similar to the proportion in 2017 (35%).

For nearly all these employers the use of non-UK workers has occurred organically, and just 5% said they had specifically sought to recruit non-UK workers. This suggests few have a specific strategy of recruiting migrants.

Recruitment agencies presented a slightly different perspective on this issue, and a third (32%) indicated that they sometimes or often encountered construction employers who expressed a preference for non-UK workers, up from a quarter (24%) in 2017 (4% said this occurred frequently at both waves). Half of agencies (50%), however, said that construction employers sometimes (32%) or frequently (18%) express a preference for workers who are UK passport holders, in line with the 54% who reported this in 2017.

The reasons for use of non-UK workers remained largely the same as in 2017, with employers focussing on these workers helping in meeting skills shortages (46%), their availability (43%) and their good work ethic (17%). In this wave of the research employers were more like to say that there was no particular reason for their use of non-UK workers (19%, up from 4% in 2017).
These findings are supported by themes that emerged from the qualitative research, with employers drawing on whichever workers were available in the labour market with the skills that they required, rather than seeking out non-UK workers.

*You have a shortage of skills in the UK, so a lot of engineers are coming from Europe because there is a shortage of skills [here] and there is a lot of unemployment in their countries.*

**50-249, Professional Services, South of England**

Some employers did suggest that non-UK workers were more flexible in the hours, tasks and locations they were prepared to work, but that the quality of work they produced was no different to a UK employee. One respondent noted, however, that migrant worker’s attitudes are not intrinsic to their nationality, but rather to the lifestyle of an individual who is prepared to move countries for work.

*It’s a misnomer when you read in newspapers that EU migrant workers have a better work ethic than the indigenous population. You need to look behind that and find out why. If you parachute yourself into a foreign country, you tend to have to work because you don’t have a family to support you – that’s why there’s a stronger work ethic.*

**50-249, Building completion and finishing, South East**
Employers’ main reasons for using non-UK workers were confirmed when prompted with several possible motivations for employing non-UK workers. Over half (53%) agreed that a lack of skilled UK applicants was at least a partial motivation (28% said this was key), and around two-fifths of those using non-UK workers were motivated by migrants having a better attitude and work ethic (44%) and/or their being more productive than UK workers in equivalent roles (37%). Employers were significantly less likely than in 2017 to say that non-UK workers being more productive than UK workers was a key reason (10% vs. 20% respectively), but aside from this there were no significant changes in these responses between the two waves of research, as shown in the following chart.

**Figure 9: Employers’ reasons for employing non-UK workers (prompted)**

<table>
<thead>
<tr>
<th>Reason</th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are not enough skilled UK people that apply when we recruit</td>
<td>43%</td>
<td>36%</td>
</tr>
<tr>
<td>They have a better attitude and work ethic</td>
<td>54%</td>
<td>49%</td>
</tr>
<tr>
<td>More productive</td>
<td>59%</td>
<td>50%</td>
</tr>
<tr>
<td>Better skilled or qualified than UK applicants</td>
<td>76%</td>
<td>71%</td>
</tr>
<tr>
<td>Non-UK workers are cheaper</td>
<td>92%</td>
<td>92%</td>
</tr>
</tbody>
</table>

Perceptions that non-UK workers may be primarily employed as a cheaper form of labour than UK workers are not borne out by the findings. As in 2017, over nine in ten (92%) employers of non-UK workers stated that this was not a motivating factor, and just 1% said this was a key reason.

Although a lack of skilled UK workers is commonly a factor in employing non-UK workers, it is rarely felt that non-UK workers are more highly skilled than their UK equivalents, and just 6% of those employing non-UK workers said migrant workers being better skilled or qualified than UK workers was a key reason for employing them. As with last year, this suggests that an insufficient supply of UK workers with the right skills drives employers to take on migrants, rather than migrants necessarily offering superior skills levels.

This finding is generally confirmed by employment agencies: over half (55%) felt that the migrant workers they placed tended to have very similar skills to UK workers, and the remainder were slightly more likely to say that non-UK workers were less skilled than their UK counterparts (20%) than to describe them as more skilled (14%).
In the qualitative research, recruitment agencies reported that non-UK workers tended to have the qualifications and experience necessary for the roles they were applying for, and if there was a lack of knowledge or skills, then these workers tended to be proactive in bringing their skills in line with the standards required in the UK. These knowledge gaps were usually simply due to minor differences in construction methods used, or a lack of knowledge of rules and regulations, which were seen as temporary issues.

The possible drawbacks or challenges of employing non-UK workers were also explored with businesses with firms with any non-UK workers. Over half (54%) did not believe there were any drawbacks or challenges (similar to the 47% who said this last year); however, a third (31%) mentioned that language or cultural barriers can prove difficult. Smaller proportions cited issues with visas and sponsorships (9%), with other challenges cited mentioned by only a very small proportion (2% or fewer).

**Recent trends in employer demand for non-UK workers**

The vast majority of employers (79%) said that their use of non-UK workers had not changed in the last 12 months. Slightly more said their use had decreased (9%) than increased (4%). These figures are in line with those found in 2017, when employers were asked the same question but in relation to 2-3 years ago.

**Figure 10: Changes in the use of non-UK workers over the past 12 months**

<table>
<thead>
<tr>
<th>Has your use of non-UK workers...</th>
<th>Decreased</th>
<th>Stayed the same</th>
<th>Increased</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018: Over the last 12 months</td>
<td>9%</td>
<td>79%</td>
<td>4%</td>
</tr>
<tr>
<td>2017: Compared to 2-3 years ago</td>
<td>10%</td>
<td>80%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Those with any current non-UK workers employed directly or working for them indirectly were more likely to say their use of these workers had decreased in the last 12 months (16%, compared to 4% of those with no non-UK workers), however, the majority (72%) still reported no change.

Larger employers with 100 or more employees were more likely than average to report that their use of non-UK workers had increased in the last 12 months (13% compared with 5% of those with 10-99 employees and 3% of those with 5-9 employees). Decreased use of non-UK workers in the last 12 months was more common amongst professional sector than construction firms (31% vs. 4%).

By geography, firms based in the East Midlands were more likely (27%) to report an increase in the number of non-UK workers they use in the last 12 months, whilst employers in London (15%) and the North West (18%) were more likely to report a decrease than those in other regions.

Increased use tended to be a result of a high number of non-UK applicants (57%), as well as employers recruiting non-UK workers due to their good work ethic (10%), the high demand for workers in general (9%) and a shortage of skilled UK workers (6%).
Decreased use tended to result from staff moving back to their native country (32%), workers leaving the company in general (21%), fewer non-UK applicants (19%) and the company reducing in size (17%).

Employment agencies reported a similar pattern regarding the placement of non-UK workers as employers. Most felt that the number or the proportion of all placements that were of non-UK workers had not changed over the last 12 months. On both measures slightly more reported increases than decreases. Results are little changed from 2017.

There was a change in the number of agencies reporting that the overall number of construction workers placed had changed, whatever their nationality: although more still reported an increase (32%) than a decrease (14%), fewer reported an increase in the volume of placements compared with 2017 (58%). This suggests a reasonably buoyant though slowing labour market.

Figure 11: Recruitment agencies placement of workers in the construction industry in the last 12 months compared to the 12 months before
Employers’ dependence on non-UK workers

Around one in six employers said they were very (5%) or quite (9%) dependent on non-UK workers, in line with 2017 findings. Among those directly employing any migrant workers, this rose to almost half (45%), indeed one in six of these employers said they were very dependent on these workers (16%).

Figure 12: Employer Dependence on Non-UK Workers

There was some evidence of an increase in perceived dependence on non-UK workers amongst larger employers; two-fifths (42%) felt either very (12%) or quite (30%) dependent, a significant increase on the quarter (23%) reporting this in 2017.

Reflecting greater use of migrant workers in the capital, half of employers in London said they were either very (22%) or quite (29%) dependent on non-UK workers (50%, very similar to the proportion in 2017, though in 2017 more (34%) felt very dependent on these workers).
Among those employing non-UK workers directly or indirectly, a third (34%) said that they were either very (12%) or quite (23%) dependent on these staff, rising to just over half (54%) of large firms with 100+ staff.

In the qualitative research, those employers who were concerned about potential caps being placed on the number of non-UK workers allowed to enter the UK to work expressed concerns about an inability to fill positions with UK workers, reflecting their dependence on the non-UK workforce.

*We would need more labourers and I've said the British people tend not to want to do labouring jobs... it could cause a massive issue.*

10-49, Building Completion and Finishing, London

*Non-UK workers* are important in that [they] make up 20% of our staff. If we didn't have them, then our operations would be affected.

50-249, Professional Services, UK Wide
Looking ahead

This section explores how the UK’s decision to leave the European Union is likely to impact on the construction industry, considering the views of construction employers but also the industry-wide perspective of employment agencies. In the qualitative research, various potential scenarios were explored with employers and agencies. Additionally, we explore non-UK workers’ plans, particularly in terms of whether they are likely to leave the UK construction sector (or the UK altogether).

Key points

- A third of employers had been impacted by Brexit, up from a quarter in 2017. The impact most commonly reported was a lack of client investment (12%).

- Whilst almost four-fifths of employers expected no impact from potential restrictions on the number of migrant workers, this decreased to half of those with any non-UK workers.

- Employers are particularly concerned about retaining their existing non-UK workforce.

- Agencies are more concerned about future access to non-UK workers than employers, possibly due to their broader view of the labour market. Two-fifths of agencies are expecting staff shortages in the sector.

- There could be labour pinch points, particularly in London and the South East. Half of London firms say they are dependent on non-UK labour and London companies are more likely to already report impacts of Brexit including fewer clients, project delays and staff shortages.

- Employers outside London could experience a knock-on effect of skills shortages if reduced access to non-UK labour means the capital and the South East draw in workers from the rest of the UK.

- Most current non-UK construction workers are not planning to leave. Only 1 in 20 intends to work in construction abroad, while more than half expect to stay in the UK until they retire.
Brexit impacts for employers to date

As part of the quantitative research, employers were asked a series of questions exploring what impacts Brexit had had on their business to date, the impacts they expected Brexit to have in the next couple of years, and more specifically the impacts restrictions on skilled and unskilled migrant worker numbers were expected to have for their own business and for the construction sector overall.

In addition, for the qualitative research, employers were presented with four potential Brexit scenarios and asked for their views on the likely impact of these for their company:

- **Scenario 1**: After a **two-year transition period** (i.e. between 2019 – 2021), restrictions are placed on the movement of EU migrant workers which make it more difficult to recruit migrant workers with lower skill levels (e.g. labourers), but there are no caps on the number of EU migrant workers allowed to work in the UK.

- **Scenario 2**: As of 2019 (i.e. **without a transition period**), restrictions are placed on the movement of EU migrant workers which make it more difficult to recruit migrant workers with lower skill levels (e.g. labourers), but there are no caps on the number of EU migrant workers allowed to work in the UK.

- **Scenario 3**: After a **two-year transition period**, restrictions are placed on the movement of EU migrant workers, which make it more difficult to recruit migrant workers with lower skill levels, and, in addition, there is a cap on the total number of migrant EU workers allowed to work in the UK.

- **Scenario 4**: As of 2019 (i.e. **without a transition period**), restrictions are placed on the movement of EU migrant workers, which make it more difficult to recruit migrant workers with lower skill levels, and, in addition, there is a cap on the total number of migrant EU workers allowed to work in the UK.

The qualitative findings are interwoven with the quantitative research throughout this section and the individual scenarios are only referred to explicitly some of the time, with more general comments and quotes regarding caps on the number of non-EU workers and potential transition periods referred to throughout.

A third of employers reported some impact to date of Brexit on their company (32%), up from a quarter in 2017 (25%). The most common impact was a lack of client investment (12%; this was mentioned by 7% of Construction firms, but by 37% of Professional Services firms), followed by project delays because of the uncertainty resulting from Brexit (8%) and increased costs (7%). Just 3% of employers spontaneously mentioned Brexit having had a positive impact on their business.

A lack of client investment was also mentioned in the qualitative research, and firms had concerns about investors being unwilling to commit funds to longer-term investments until there is clarity about the UK’s future trade and immigration position.

_Everybody tightened their purse strings somewhat, so there was a bit of a slowdown_

_500+, Electrical, plumbing and other construction installation activities, UK wide_

Employers who directly employ non-UK workers were more likely to have experienced impacts as a result of Brexit (39%) particularly experiencing staff shortages or problems with recruitment (19% vs. 1% among other employers), or reporting a lack of clients or client investment (21% vs. 9%).
At the qualitative stage, there was a common sentiment that after initial concerns following Brexit, when many projects were put on hold or delayed, the market had returned to normal after being initially ‘spooked’ by Brexit. However, as with last year’s research, employers noted that there was still extensive uncertainty and many thought it was still unclear what the impacts of Brexit might be.

*Everybody tightened their purse strings somewhat, so there was a bit of a slowdown, but it seems to have bounced back since then.*

**500+, Electrical, plumbing and other construction installation activities, UK wide**

*I think the important thing is to get clarity as quickly as possible. It is more about the politicians reaching a solution – it is about certainty.*

**50-249, Professional Services, UK wide**

A minority of employers felt that there had been impacts due to uncertainty and corroborated the quantitative findings that clients were being more cautious about investing, suggesting that although impacts had not been felt thus far, some parts of the industry were preparing themselves for impacts to come.
Outlook and Expectations

Employers were asked about their views on the economic outlook for the UK economy and the construction sector specifically. Overall, employers were optimistic about growth; around two-fifths (44%) expected growth in the UK economy and half (50%) expected growth in the construction sector.

This compares with around one in five employers that expect the construction sector and the economy as a whole to contract over the next 2-3 years (21% and 23% respectively). Employers with direct non-UK employees were more likely than average to expect the UK economy to contract (34%).

Figure 15 Expectations held by employers for economic change over the next 2-3 years

Despite the relatively optimistic views in terms of economic and sector growth and the lack of notable impacts thus far, almost half (45%) of employers interviewed expected Brexit to have impacts on their company in the next couple of years, rising to three-fifths (62%) of employers with direct non-UK workers. The impacts anticipated were almost all negative. The most common was an expected lack of clients or lack of client investment, mentioned by 15% of employers (rising to over a quarter of professional services employers (27%) and firms based in London (28%)).

Employers also mentioned staff shortages and recruitment issues, as well as increased supply chain costs (both 8%). Employers in London were significantly more likely to mention staff shortages and recruitment issues (38%), as were employers with any direct non-UK employees (27%).
Indeed, when asked specifically about their expectations of the ease or difficulty of recruitment in the forthcoming (2-3) years, almost half (45%) of employers expected the recruitment of skilled staff to become more difficult, as shown in the chart below.

Figure 17 Employer expectation for recruitment of workers (skilled and semi-skilled/unskilled) over the next 2-3 years
Despite these concerns for the next few years, only three in ten (29%) employers who had experienced impacts due to Brexit to date had taken actions or put plans in place in response to these impacts or potential future impacts. Professional services employers (58%) and employers who said that they were dependent on non-UK workers (47%) were both more likely to have put plans in place.

Those employers who had acted or had plans to do so were most likely to have strengthened their business (35%), expanded their business (28%) or reduced the size of their firm (13%). Figure 18, below, shows that relatively few (8%) have or plan to increase training, or to increase the number of apprentices they take on (8%) despite two-fifths (43%) of all employers expecting to have to spend more on training staff in the future as a result of any potential restrictions on the movement of labour (see Figure 21).

**Figure 18 Actions employers have taken (or planned to take) in response to Brexit, among those that have already acted or plan to (spontaneous)**

<table>
<thead>
<tr>
<th>Action</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengthen the business (detail unspecified)</td>
<td>35%</td>
</tr>
<tr>
<td>Expand the business</td>
<td>28%</td>
</tr>
<tr>
<td>Downsize the business</td>
<td>13%</td>
</tr>
<tr>
<td>Recruit more apprentices</td>
<td>8%</td>
</tr>
<tr>
<td>Increase training/Upskill</td>
<td>8%</td>
</tr>
<tr>
<td>Move business abroad</td>
<td>7%</td>
</tr>
<tr>
<td>Increase recruitment activity</td>
<td>5%</td>
</tr>
<tr>
<td>Take on fewer jobs</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: All employers that have taken/planned actions (69)
Impacts of restrictions of non-UK workers

Employers were asked about the impacts on the construction sector and their own company that might result from restrictions on skilled and unskilled EU workers entering the UK to work.

In terms of the impact on their own business, more firms expected to be affected if there were restrictions on access to skilled EU workers following Brexit (22%) than if there were greater restrictions on unskilled workers (13%). For both types of worker, the main impacts were felt to be it being harder to recruit staff and an increase in skill shortages. For example, 7% of all employers expected increased skill shortages in their firm if access to skilled workers coming to the UK were restricted following Brexit. Results for the expected impacts on their own business are shown on the left-hand columns of Figures 19 and 20.

Those currently employing non-UK workers directly were more likely to anticipate restrictions impacting their firm, indeed just over half of those employing non-UK workers directly anticipated impacts arising from restrictions on access to skilled EU workers (see Figure 20).

Related to this, and reflecting high levels of dependence on non-UK workers already discussed, employers in London were significantly more likely than average to report likely impacts for their firm resulting from restrictions on access to skilled (59%) or unskilled (20%) EU workers.

Figure 19 Employer views on the potential impacts on their business and the wider sector of restrictions on EU unskilled workers coming to the UK following Brexit

<table>
<thead>
<tr>
<th>Expected impacts of restrictions on unskilled EU workers</th>
<th>Impacts for the sector as a whole</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Impacts for your business</strong></td>
<td><strong>Impacts for the sector as a whole</strong></td>
</tr>
<tr>
<td>Harder to recruit staff</td>
<td>Summary: Any impact 73%</td>
</tr>
<tr>
<td>Skills shortages</td>
<td>Summary: Any skill or staff shortage 44%</td>
</tr>
<tr>
<td>Wages/costs will increase</td>
<td>Staff shortages 36%</td>
</tr>
<tr>
<td>Increase use of apprentices</td>
<td>Wages and costs increase 12%</td>
</tr>
<tr>
<td>Restrict company growth</td>
<td>Skills shortage 9%</td>
</tr>
<tr>
<td>Any impact</td>
<td>Sector growth will slow 5%</td>
</tr>
<tr>
<td>Any (with direct non-UK)</td>
<td>No/low impact 10%</td>
</tr>
<tr>
<td>Any (no direct non-UK)</td>
<td></td>
</tr>
<tr>
<td>No impact</td>
<td></td>
</tr>
</tbody>
</table>

More likely to be reported by London firms

Base: All employers (2018: 400; 2017: 401)
As shown in the previous two charts, employers were far more likely to anticipate impacts for the sector as a whole if access to EU workers is restricted following Brexit than they were to anticipate impacts for their own firm. In the qualitative research, this often simply reflected quite low use of EU workers within their own firm.

Our volumes [of non-UK workers] are quite small, it is not dramatic for us – maybe more for the wider industry. Not a problem in our firm.

50-249, Professional Services, UK Wide

For both skilled and unskilled workers, around three-quarters of employers expected impacts for the sector. This was typically expected to be staff shortages and skill shortages, with the latter more likely to be mentioned in relation to restrictions on the skilled EU workers. The quantitative work did not assess the severity of these impacts, though at the qualitative stage it was not uncommon to hear the view expressed that the industry is resilient, having made it through the last recession, and that vacancies could be filled by the UK labour market if needed.

Year-on-year there’s always shouts of “there’s a shortage of skills within the construction industry”. We get by, we adapt, we survive, we innovate.

50-249, Building completion and finishing, London and South East

As part of the quantitative survey, employers were asked specifically how likely four different outcomes would be to arise for their company in the face of any restrictions on EU workers. These covered wage inflation and higher costs, needing to spend more on training, finding it harder to recruit, and increased skill shortages in the short and medium term. Results are shown in Figure 21.
Around two-fifths felt restrictions on the number of EU workers would be likely to result in wage inflation and higher costs (44%), their needing to spend more on training (43%), and it being harder for their firm to recruit (37%). A quarter (24%) felt it would increase skills shortages in the short and medium term. A more detailed breakdown of responses is shown in the chart below.

**Figure 21: Likelihood of the following occurring in employer’s company if restriction place on the number of EU workers allowed to enter the UK to work**

<table>
<thead>
<tr>
<th>Outcome</th>
<th>35%</th>
<th>18%</th>
<th>32%</th>
<th>12%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wage inflation and higher costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We will need to spend more on training</td>
<td>40%</td>
<td>16%</td>
<td>26%</td>
<td>17%</td>
</tr>
<tr>
<td>We would find it harder to recruit</td>
<td>41%</td>
<td>23%</td>
<td>28%</td>
<td>9%</td>
</tr>
<tr>
<td>Increased skills shortages in the short and medium term</td>
<td>55%</td>
<td>20%</td>
<td>17%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Employers were asked how important they felt a two-year transition period from March 2017 would be for their business, meaning policy changes as a result of Brexit would not be implemented until April 2019. A third (32%) felt that it would be very or quite important to have a transition period, rising to half (49%) of those with any non-UK workers directly employed and 60% of large employers.

In the qualitative research, those employers concerned about the impacts of Brexit tended to feel a transition period would be very important for their business, provided the industry made use of the time available to put preparations in place:

*Might be a couple of years where you’ll struggle but then the growth will come… I think you just need to get the transition right.*

**10-49, Demolition and site preparation, UK wide**

*Takes two years for a bricklayer to be qualified […] we could have another 50,000 bricklayers in the industry if we started now.*

**10-49, Building completion and finishing, South of England**
The Agency perspective

Employment agencies had a more pessimistic outlook to employers about the future of the construction industry post-Brexit. They were particularly likely to stress the need for a transition period: half (52%) felt that this would be very important and a further quarter (24%) that it would be quite important.

In the qualitative discussions, agencies simply felt a transition period was needed to give agencies and the construction sector in general time to prepare and get ready.

*It’d be mayhem wouldn’t it? […] As a recruiter it’s important for us to understand [what the regulations are]… from my perspective it could cause a lot of problems if it was an immediate effect… an overnight thing.*

Recruitment Agency, 50-249

In terms of the number of EU workers agencies expected to place before the UK leaves the EU in April 2019, the most common response was that they thought the number would remain at about the current level. More of the remainder expected the number to fall (30%) than increase (16%).

Agencies were asked how changes to the UK labour market would impact their work in the construction sector. A quarter (26%) thought that it would lead to staff shortages in the sector, whilst around one in eight (12%) reported that there would be more demand for their services, increased client charges, wage increases, reduced profits and skills shortages (as shown below in Figure 22). Sixteen percent thought that changes to the UK labour market would have no impact on their own recruitment work.

Figure 22: Expectations amongst recruitment agencies of impacts of changes to the UK labour market on their work in the construction sector

![Figure 22: Expectations amongst recruitment agencies of impacts of changes to the UK labour market on their work in the construction sector](image)
Employment agencies anticipated a greater level of impact from the potential restrictions on skilled and unskilled labour for the construction industry than employers (Figure 23). Only 12% of agencies felt that there would be no impacts for the construction sector as a whole if restrictions on skilled labour, or restrictions on unskilled labour, were implemented.

Around half (52%) felt that restrictions on unskilled labour were likely to lead to a labour gap or recruitment difficulties, a quarter (26%) to wage and labour cost increases and almost a fifth (16%) to an impact on productivity.

Agencies thought that restrictions on skilled labour were likely to lead to shortages of skilled labour and recruitment difficulties (46%), impacts on productivity (26%) and increased wage and labour costs (24%).

Figure 23: Expectations amongst recruitment agencies of impacts to the construction sector if migration restrictions were implemented on unskilled workers, or on skilled workers

These concerns are reflected in agencies’ responses to the potential Brexit scenarios presented to them in the qualitative research. They were alarmed by potential caps on non-UK workers, particularly so in the scenarios with no transition period, which they felt would be essential in enabling them to prepare.

You will be relying on people that are already here. Rates are going to go up which will make companies earn less money and job are not going to get completed on time… people will be forced to work quicker and longer hours, so potentially more mistakes could happen.

Recruitment Agency, 500+

Additionally, there was a sense of needing to hold on to the existing non-UK workers, as well as to ensure that it is not too difficult for non-UK workers to enter the UK to work in the construction industry and that the government would need to be flexible with any policy regarding caps on new workers entering.
Make sure when people come over… make it easier, but check they are monitored. They have to come over to work… they should be rewarded and helped.

Recruitment Agency, 500+

Non-UK workers’ plans

The vast majority of non-UK workers interviewed (80%) plan to remain in the construction sector in the UK in the short term. Roughly the same proportion (77%) said this last year, suggesting that the plans of migrant workers have remained largely unchanged.

Figure 24: Non-UK workers’ plans for the future

In the qualitative research non-UK workers indicated that they were keen to stay, noting that the UK is their home now and that the standard of living and wages they are able to get here are better than those they would be able to get elsewhere.

Pay here is four times more and living expenses are fair here. I can have a higher standard of living here. In Poland, prices are similar to here; energy costs are the same, but wages are four times less

CAD Technician, aged 33, Poland

However, other workers in the qualitative research were concerned about the impacts of Brexit, including rising costs of living, a reduction of available jobs and intensified discrimination towards non-UK workers. These impacts could make them less likely to plan to stay in the UK to work and there was a feeling of uncertainty and concern, despite the general consensus that at present they would like to stay.

I don’t know if there will be enough jobs because we still have some problems at work… British people say “[go] back to your country, you’ve taken my job”, so maybe agencies won’t employ us. I will be forced to go home if I don’t have work. The big fear is not to have a job. That’s the main one.

Electrical Improver, aged 32, Romania

In the quantitative survey, three-fifths (61%) of non-UK workers said that they plan to work in the UK until they retire (56% in 2017). Only a fifth (22%) expect to definitely leave the UK to work elsewhere at some point, in line with the 21% who said this in 2017. Results again suggest continuity with findings from 2017.
When considering their future plans regarding whether to remain in the UK or leave, generally all migrant workers considered the aspects of life discussed with them important (see chart below), although being near their family, good job opportunities, and rates of pay were particularly key (important for around nine in ten).

**Figure 25: Extent of the importance to non-UK workers of the below factors when considering future plans (prompted)**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Not at all/not very important</th>
<th>Quite important</th>
<th>Very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Being near to family</td>
<td>9%</td>
<td>15%</td>
<td>73%</td>
</tr>
<tr>
<td>Rates of pay</td>
<td>6%</td>
<td>20%</td>
<td>70%</td>
</tr>
<tr>
<td>Job opportunities</td>
<td>6%</td>
<td>28%</td>
<td>62%</td>
</tr>
<tr>
<td>Exchange rates / value of sterling</td>
<td>21%</td>
<td>23%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Three-fifths (62%) of non-UK workers were aware that EU citizens who are already living in the UK have the right to remain after Brexit. The majority (89%) had found this out through media sources and only 5% through word of mouth.

Workers who were not aware of the agreement were asked whether knowing about it now would make them more likely to remain in the UK after Brexit; three-fifths (60%) said that it would, compared with a third (32%) who said that it would make no difference. This further backs up findings that for the most part non-UK workers would like to stay in the UK to work if the political, economic and social circumstances allow them to do so.