

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

Migrant Workers Report - May 2019





Study prepared by BMG Research from a commission by CITB.

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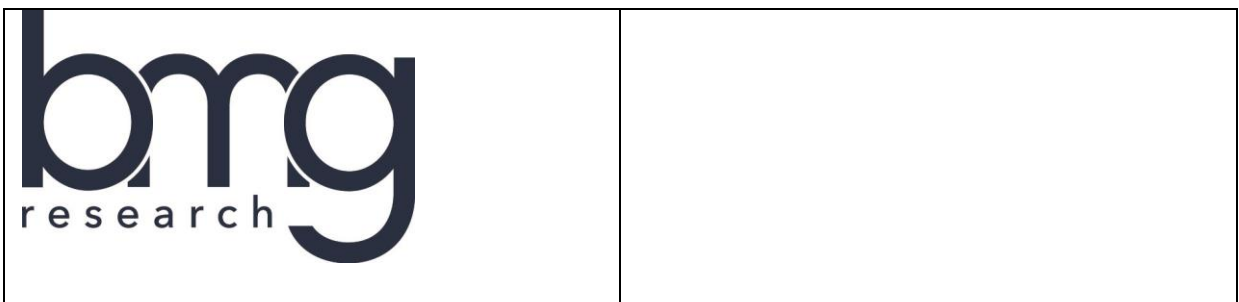




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Executive summary

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 79 interviews were conducted with migrant construction workers.
- For the purposes of this report, a migrant worker is classified as someone who is currently working on a site in a country or region different to where they were living prior to commencing their first job in construction in the UK.

Profile of the sample

- All but 4% of migrant construction workers are male. Three-fifths of migrant construction workers interviewed are aged under 35 (58%), which is a higher proportion than the UK average in the survey (45%). Just 2% of migrant construction workers are aged 60 or over.
- Overall 12% of migrant construction workers are of BME ethnic origin. The UK average in the survey is 6% (compared with 15% of the UK population as a whole).
- Overall, two-thirds (66%) of migrant workers originated from another EU country (not including the UK) and around a quarter from a country outside the EU (23%). Romania and Poland are the most represented countries amongst migrant workers.
- Overall, more than three-fifths of migrant construction workers have lived in the UK for more than 5 years (62%). One in six (17%) have lived in the UK for between 3 and 5 years, 1 in 8 for between 1 and 3 years (12%) and around 1 in 10 for less than a year (9%).
- By trade/occupation, the highest proportion of the migrant worker sample is accounted for by labourers/general operatives (22%), followed by carpenters/joiners (11%) and site managers (11%).
- More than a quarter of migrant construction workers interviewed perform a supervisory or management role on their site (28%); a higher proportion than in 2015 (19%) and similar to the UK average in 2018/19 (30%).
- Nearly two-thirds of migrant construction workers interviewed for the survey are self-employed (63%), which is a higher proportion than the UK average (of 43%). More than a quarter of migrant workers are directly employed by a company (28%) and this is a lower proportion than the UK average (of 49%). Since 2015, there has been a decrease in the proportion that are directly employed (from 39% in 2015) and an increase in the proportion that are self-employed (from 51% in 2015). Just 8% of migrant construction workers work for an agency, which compares with 7% across all construction workers.



- Overall, around two-fifths of migrant construction workers (39%) are employed on a temporary, rather than permanent basis. This is a higher proportion than the UK average (28%) and compared with 2015 (26%).
- Similarly to the UK average, three-fifths of migrant construction workers work between 40 and 49 hours per week (60%, as across the UK), and 3 in 10 works more than 50 hours per week (29%), which is higher than the UK average (23%).

Work history

Time in the sector

- One in six migrant construction workers have worked in the industry for at least 20 years (18%), which compares with a higher UK average (32%). They are more likely than UK/ROI nationals to have worked in the industry for less than 10 years (58%)
- Nearly three-quarters of migrant construction workers have only ever worked within the construction industry (72%), an increase on 2015 (67%), and higher than the UK average in 2015 (67%). More than three-fifths of migrant construction workers (62%) have worked pretty much continuously, without spells out of work and this is a higher proportion to that across the UK (56%).

Previous non-construction jobs

- Amongst the 1 in 5 migrant construction workers that worked in another sector before starting work in construction (22% of all migrant workers interviewed), the sector worked in beforehand is most likely to have been manufacturing (36%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trades occupations (37%), followed by managerial occupations (29%).

Occupational switching within the construction sector

- More than half the migrant construction workers interviewed (55%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is higher than in 2015 (29%) and compared to the UK average in 2018/19 (36%).
- Workers are most likely to have previously worked as a labourer/general operative (40%); while 1 in 5 have worked as a painter/decorator (19%).
- Thinking about their future plans in the construction sector, two-thirds of migrant construction workers would like to carry on in the same trade or occupation (68%), while a fifth would like to change their trade/occupation (20%) and just 1% would like to leave construction altogether. Migrant workers are significantly less likely to want to carry on as they are (80% is the UK average).
- The most popular occupation to which migrant construction workers would like to change is site manager (46% of those who would like to change).



- They are most likely to want to change trade/occupation to obtain better pay (74% of those wanting to change).
- Three-quarters of migrant construction workers that would like to change trade/occupation (76%) believe they will require further training or qualifications in order to do so. This is a lower proportion than the UK average (87%).

Qualifications and skills

Skills cards/certificates

- Most migrant construction workers, as across the UK workforce as a whole, hold some form of construction skill card or certificate (98% cf. 97% in 2015 and a UK average in 2018/19 of 97%).
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (91% of migrant workers; 85% across the UK).

Construction-specific qualifications

- Two-thirds of migrant construction workers say they had no formal qualifications when they first started working in the construction industry (67%). This compares with a higher UK average (72%).
- Compared with 1 in 4 migrant construction workers that had qualifications when they first started working in construction (27%), three-quarters of migrant construction workers interviewed now report holding some sort of construction-related qualification (75%, compared with 43% in 2015 and a UK average in 2018/19 of 72%).
- The qualifications most likely to be held by migrant construction workers are NVQ/SVQ qualifications (39% of those with qualifications) while 1 in 8 migrant construction workers hold a degree (12%). Just 5% of migrant construction workers with qualifications now hold an apprenticeship.

Basic skill needs

- Two in five migrant construction workers believe they would benefit from some form of training in basic skills (41%), which is a higher proportion to 2015 (34%) and the UK average in 2018/19 (11%).
- In terms of the type of training required, more than 1 in 3 identify a need to improve their spoken English (36%), while 1 in 8 feel they need to improve their writing (13%). Fewer need to improve their reading skills (9%) or maths skills (5%).

Current study for qualifications

- One in eight migrant construction workers are currently working towards formal qualifications relevant to the construction industry (13% cf. 12% in 2015 and a UK average in 2018/19 of 15%).
- Migrant workers are most likely to be working towards qualifications in plastering/drylining/ceiling fixing.



Supervisory/managerial training

- Of those migrant workers that are not currently performing a supervisory/management role, more than a third are certain that they would not like to do so (36%), a lower proportion than across the UK (51%), while 1 in 3 would like to do so (31%) and a further third are unsure (33%).
- One in three migrant construction workers (37%) have received any formal training designed to improve managerial or supervisory knowledge or skills, which is slightly higher than the UK average (34%).
- The Site Safety Supervisors Course (37%) and SMSTS (Site Manager Safety Training Scheme) (33%) are the most frequently mentioned type of training received, followed by in-house training (18%).

Overall skill levels

- The vast majority of migrant construction workers interviewed (98%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. One in six migrant construction workers (16%) holds a skill card/certificate but have no other construction qualification. This compares with a higher UK average of 22%.
- Overall, more than half of migrant construction workers that provided a response have qualifications equivalent to Level 2 or above (55% cf. 41% in 2015 and 59% across the UK in 2018/19). They are less likely than the UK average to hold qualifications equivalent to Level 3 or above (11% cf. 15% in 2015 and 27% across the UK in 2018/19).

Geographic mobility

Work history in the region/nation

- That their employer sent them there (45%) was the most likely reasons why migrant construction workers are based within the region/nation they are based in.
- In 2018/19 compared with 2015, a lower proportion of migrant construction workers have worked within their current region/nation for their *entire* construction career (30% cf. 39% in 2015) and the majority of migrant construction workers have remained in the same region/nation for *all or most* of their career (66%). However, this is lower than the UK average of 77%.
- The majority of migrant workers consider their residence in the UK to be permanent (86%), while most of the remainder report that they are living in the UK temporarily and their permanent residence is elsewhere in the EU (11%).
- Four-fifths of migrant workers considered where they live at the time of the survey to be their permanent address (81%). This compares with 79% in 2015 and a UK average of 94% in 2018/19.



- One in six migrant workers were living at a temporary address for convenience while working in the area at the time they were surveyed (17%) and this compares with 5% of UK/Republic of Ireland nationals. It is a higher proportion than in 2015 amongst migrant workers (12%).
- On average, at the time of the survey, migrant workers lived 17 miles from the site at which they were working. This compares with a UK average of 18 miles. The average in 2018/19 amongst migrant workers is lower than in 2015 (26 miles). In 2018/19 almost half (44%) lived within 10 miles of the site at which they were working, compared to 37% in 2015.
- Based on those providing details, a third of migrant workers surveyed lived in London at the time of the survey (35%). They were next most likely to be based in the East of England (15%), followed by the East Midlands and West Midlands (both 11%).
- The average furthest distance migrant workers have travelled from their permanent home address to a work site in the last 12 months was 46 miles, which compares to a higher UK average (54 miles). Migrant workers were more likely than the UK average to report that the furthest distance they have travelled to a site from their home was no more than 20 miles (40%, compared with 26%). They were also less likely than the UK average to have travelled more than 100 miles to a work site in the last 12 months (11% compared with 17%). Compared with 2015, migrant workers have worked closer to their permanent home address in the last 12 months (27% had travelled up to 20 miles at most; 20% had travelled more than 100 miles).
- More than four-fifths of migrant construction workers anticipate that their next job will allow them to travel from their permanent home address on a daily basis (87%). This is a higher proportion than in 2015 (67%) and a similar proportion to the UK average in 2018/19 (84%).
- Three in ten migrant workers had moved to a different region/nation when taking up their current job (30%). Thus, the majority (65%) had remained in the same region (the remaining 5% had not had a previous job in construction). This compares with UK averages of 22%, 69% and 9% respectively.
- More than two-fifths of migrant workers studied or trained for their first construction qualification in a different region/nation to the one they were based in when interviewed (43%). This is a significantly higher proportion than the UK average (23%).
- The highest proportion of migrant workers that had studied for a qualification obtained it in London (37%), with 1 in 6 having studied in other parts of Europe, excluding the UK and the Republic of Ireland (17%).

Sub-sector and sector mobility

Sub-sector mobility

- As in 2015, the vast majority of migrant construction workers have worked on new housing (69% in 2018/19 and 73% in 2015). For all other types of projects, the proportion of migrant construction workers that have spent time working on them has increased since 2015; and for all types of projects, the proportion of workers that have spent time working on them is lower among migrant workers than the UK average.



- Overall, just over two-fifths of all migrant construction workers have only worked on one project type (43%), which is a lower proportion than in 2015 (56%) but significantly higher than the 2018/19 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 migrant construction workers of all ages, around half say they definitely will be (51% cf. UK average of 48%); a further third think it is very or quite likely (32%); 4% consider it unlikely; and just 3% say they definitely won't be. A further 4% hope to be retired by then, while 6% 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, across the UK, 79 interviews were conducted with migrant workers.

For the purposes of this report, a migrant worker is classified as someone who is currently working on a site in a country or region different to where they were living prior to commencing their first job in construction in the UK.



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
Wales	287	4.3
Northern Ireland	155	2.2
Unknown (paper copies returned by post)	2	N/A
Migrant workers	79	11.0
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.

Migrant Workers are referred to by the abbreviation 'MW' 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 migrant construction workers, compared with the UK 2018/19 sample as a whole and official UK statistics from the Annual Population Survey (where comparisons are possible).

The vast majority of migrant construction workers in manual roles interviewed were male (96%). Male dominance is greater in the migrant workers sample, as it is across the UK sample as a whole, than in the UK workforce as a whole. It should be noted that 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 in maintenance and repair.

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

	MW 2018/19	UK 2018/19		UK Workforce*
	%	%		%
Male	96	98	Male	53
Female	3	1	Female	47
Transgender	0	<0.5	Transgender	-
Non-binary	0	<0.5	Non-binary	-
Prefer not to say	1	<0.5	Prefer not to say	-
<i>Unweighted bases</i>	<i>79</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



Amongst migrant workers the youngest age group (16 to 24 year olds) account for a fifth of construction workers (20%), a similar proportion to the UK average (17%). Compared with the UK average there is a higher proportion of migrant workers aged 25 to 34 years (38% cf. 28%), while the proportion of workers aged 35 to 44 is slightly higher than the UK average (27% cf. 23%). There are fewer 45 to 54 year olds among migrant workers compared with the UK average (11% cf. 20%) and fewer migrant workers than the UK average are aged 55 and over (4% cf. 12%). Workers aged 60 and over account for just 2% of migrant workers.

Compared with the UK construction workforce overall, there is a higher proportion of migrant workers aged under 35 years (58% cf. 45% across the UK sample and 36% of economically active adults across the UK).

Figure 3: Age profile of the migrant workers sample compared with the UK sample and the Annual Population Survey

Base: All respondents

	MW 2018/19 %	UK 2018/19 %		UK Workforce* %
16 to 19 years	1	5	16 to 19 years	4
20 to 24 years	19	12	20 to 24 years	9
25 to 34 years	38	28	25 to 34 years	23
35 to 44 years	27	23	35 to 49 years	33
45 to 54 years	11	20	50 to 64 years	27
55 to 59 years	2	7		
60+ years	2	4	65+ years	4
<i>Unweighted bases</i>	<i>79</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 migrant construction workers are of White origins, consistent with previous years (85% cf. 94% of the UK sample). The composition of the White group differs from that seen across the UK sample though, with just 15% of migrant workers being White British, compared with 79% across the UK sample; 2% White Irish, which is similar to the UK average (3%) and 69% of migrant workers self-classifying as 'White – other background', compared with 12% across the UK sample.

Similarly to the UK sample, 2% of migrant workers are of Black origin but a higher proportion of migrant workers than the UK average are of Asian origin (7%, cf. 2%). Overall, 12% of migrant workers represent BME groups, compared with 6% of UK construction workers in the survey.



Figure 4: Ethnic profile of the sample compared with the UK sample and the UK Population

Base: All respondents

	MW 2018/19 %	UK 2018/19 %	UK Population aged 16-64* %
White	85	94	85
Black	2	2	3
Asian	7	2	6
Mixed	0	1	1
Other/Not stated	7	1	4
<i>Unweighted bases</i>	<i>79</i>	<i>4048</i>	<i>41,217,200</i>

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

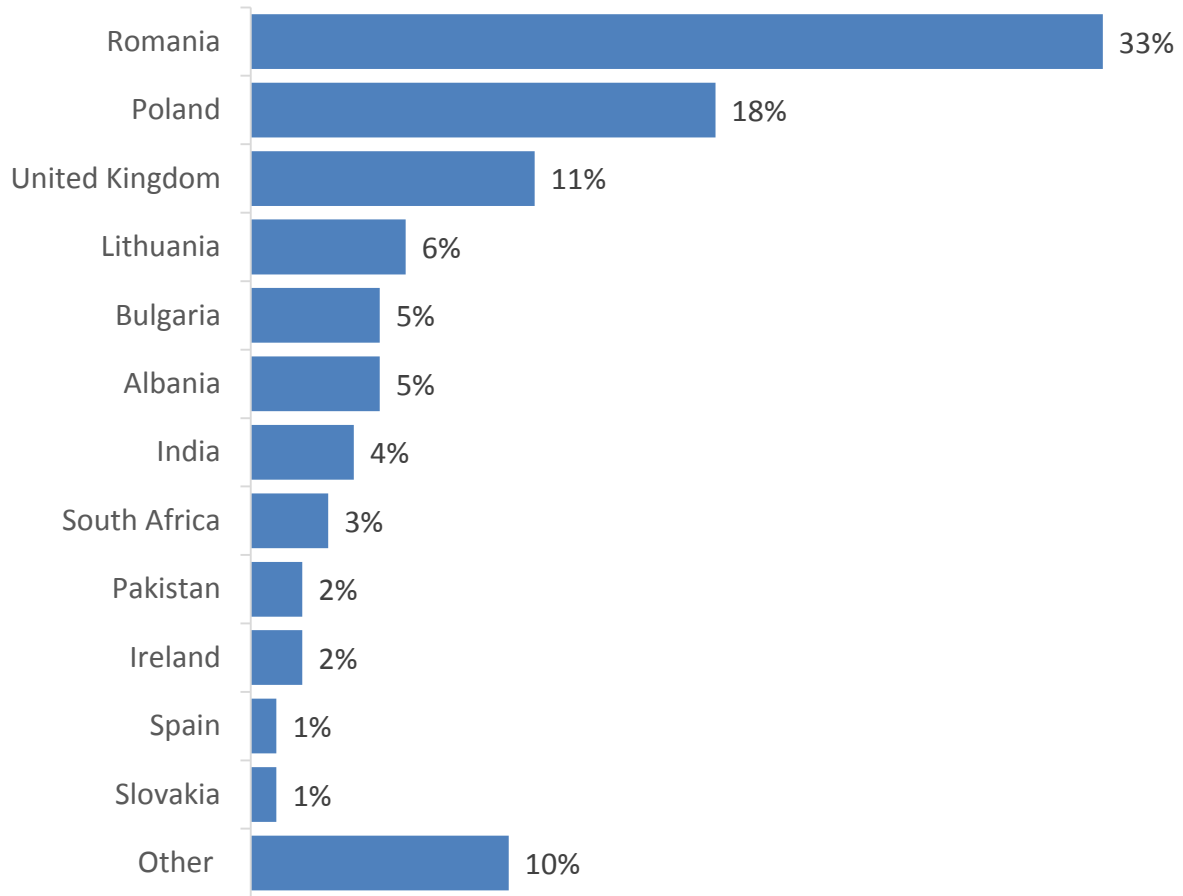
In the survey, construction workers were asked for detail about their nationality and country of origin.

A third of migrant workers originated from Romania (33%) and a sixth from Poland (18%). Around 1 in 20 each originated from Lithuania (6%), Albania (5%) or Bulgaria (5%), while fewer originated from India (4%), South Africa (3%), Ireland (2%), Pakistan (2%), Slovakia (1%) or Spain (1%). One in ten mentioned another country.

Overall, two-thirds (66%) originated from another EU country (not including the UK) and around a quarter from a country outside the EU (23%), while one-tenth were born in the UK but subsequently moved abroad (11%).



Figure 5: Countries of origin
Base: All respondents



Q45

Three-quarters of migrant construction workers hold a passport for another country (75%).

The majority of those holding a passport for another country hold a EU passport (88%), with the remaining 12% holding a passport for a country outside of the EU.

Of those migrant construction workers that were born outside of the UK or have a non-UK passport, 11% have British citizenship.

Overall, more than three-fifths of migrant construction workers have lived in the UK for more than 5 years (62%). One in six has lived in the UK for between 3 and 5 years (17%), 1 in 8 for between 1 and 3 years (12%), and around 1 in 10 for less than a year (9%).

Amongst all migrant construction workers, 5% indicate that they have a long term illness, health problem or disability which limits the type of work they can do. The most common illness/disability amongst these workers is 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 (78%). The remainder report having hearing issues (22%). Across the UK construction workforce, 3% 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 6 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, carpenter/joiners and site managers are the top three occupations amongst migrant construction workers in the UK. This reflects the profile across the UK, although there are more labourers/general operatives amongst migrant workers than the UK average, and considerably fewer bricklayers. Compared with 2015, there has been an increase in the proportion of migrant workers that are site managers (from 5% in 2015 to 11% in 2018/19), plant/machine operatives (from 5% in 2015 to 9% in 2018/19) and technical staff (from 2% in 2015 to 6% in 2018/19) and a reduction in the proportion of migrant workers that are bricklayers (from 10% in 2015 to 1% in 2018/19).

Figure 6: Occupational profile

Base: All respondents '-' = not applicable

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
Labourer/General operative	22	21	16
Carpenter/joiner	11	10	10
Site manager	11	5	11
Plant/machine operative (e.g. fork lift/JCB)	9	5	7
Technical	6	2	4
Electrician	5	4	6
Painter/decorator	5	7	2
Plasterer	5	2	1
Dryliner	5	8	3
Scaffolder	4	2	4
Banksman/banksperson	4	2	1
Steel erector	4	2	1
Ground worker	2	2	4
Concrete worker	2	<0.5	1
Bricklayer	1	10	11
Plumber	1	1	4
Pipe fitter	1	1	2
Ceiling fixer	1	1	1
Other	3	4	3
<i>Unweighted bases</i>	79	352	4048

Q5



Supervisory roles

More than a quarter of migrant construction workers interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (28%). This is a higher proportion than in 2015 (19%), and similar to the UK average in 2018/19 (30%).

Employment status

The highest proportion of migrant construction workers within 2018/19 sample is self-employed (63%). This is a higher proportion than in 2015 (51%) and compared with the UK average in 2018/19 (43%).

More than a quarter of migrant construction workers within 2018/19 sample is directly employed by a company (28%), which is a lower proportion than in 2015 (39%) and compared with the UK average in 2018/19 (49%).

The remainder of migrant workers work for an employment agency (8%) or on some other basis (2%) and this reflects the UK workforce as a whole (7% and less than 1% respectively).

Figure 7: Employment status

Base: All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
Employed directly by a company (contractor or sub-contractor)	28	39	49
Self-employed	63	51	43
Working for an employment agency	8	8	7
Working on some other basis	2	2	<0.5
<i>Unweighted bases</i>	79	352	4048

Q20

Employment contract basis

Overall, around two-fifths of migrant construction workers (39%) are employed on a temporary rather than permanent basis (57%). Migrant workers are more likely to be in temporary employment in 2018/19 than they were in 2015 (26%) as with the UK-wide workforce (28% is employed on a temporary basis in 2018/19, compared with 23% in 2015).

Hours worked

Migrant construction workers work a similar number of hours to UK/ROI nationals, with 60% working between 40 and 49 hours per week, as reported across the UK. They are slightly more likely than the UK average to work more than 50 hours a week (29%, compared with 23%).



Work histories

Time in the sector

One in six migrant construction workers have worked in the construction industry for over 20 years (18%) and this is significantly less than the UK average (32%). They are more likely than UK/ROI nationals to have worked in the industry for less than 10 years (58%, compared with 42%).

Looking at this in more detail highlights that a higher proportion of migrant workers than the UK average have worked in construction for between 5 and 10 years (26%, compared with 14%) and slightly more have been in the industry for less than 5 years (33%, compared with 28%).

Figure 8: Years spent working in the construction sector (cumulative)

Base: All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
Less than 6 months	2	6	3
Up to a year	8	13	6
Up to 2 years	15	23	12
Up to 5 years	33	40	28
Up to 10 years	58	65	42
Up to 20 years	82	86	68
More than 20 years	18	14	32
<i>Unweighted bases</i>	79	352	4048



Pre-construction employment histories

Nearly three-quarters of migrant workers have only ever worked in the construction industry (72% cf. 67% across the UK and 67% amongst migrant workers in 2015). This includes more than three-fifths who have worked in construction pretty much continuously (62%); 3% for whom this is their first job; and a further 7% that have only ever worked in the construction sector but have had spells out of work.

Figure 9: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.

All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
I've worked in construction pretty much continuously (and not worked in any other industry)	62	57	56
I have only worked in construction jobs but have had spells of being out of work	7	6	4
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	5	9	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	22	20	23
This is my first job. I haven't worked in any other industry.	3	4	7
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	1	2	3
<i>Unweighted bases</i>	79	352	4048

Q2

Overall, around 1 in 5 migrant construction workers 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 (22%). This is a similar proportion to that reported in 2015 (20%) and to the UK average (23%).



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 migrant workers had previously worked in manufacturing (36%) while just over 1 in 5 had worked in transportation and storage beforehand (22%), which was a higher proportion than among construction workers across the UK as a whole (6%).

Figure 10: Industry worked in before starting work in the construction sector

Base: Where first job was not in construction

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
C – Manufacturing	36	19	45
H - Transportation and storage	22	15	6
B – Mining and quarrying	16	0	6
A - Agriculture, Forestry and Fishing	11	3	9
E – Water supply, sewerage, waste management	7	0	3
J – Information and communication	7	1	<0.5
<i>Unweighted bases</i>	<i>16</i>	<i>77</i>	<i>862</i>

Q3

In terms of the job roles that migrant construction workers have undertaken in other sectors, more than a third had worked in skilled trades occupations (37% cf. 27% across the UK) and 3 in 10 had worked in managerial occupations (29% cf. 19% across the UK).

Around 1 in 5 migrant workers that had worked in other sectors had worked in associate professional and technical occupations (19%), while slightly fewer had worked as within administrative and secretarial occupations (15%). These figures compare with 28% and 6% respectively across the UK as a whole.



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, more than half of migrant construction workers have worked in more than one construction trade or occupation whilst working in the construction industry (55%), which is a higher proportion than in 2015 and compared with the UK average in 2018/19 (29% and 36% respectively).

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 11 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 (40%) while 1 in 5 workers has previously worked as a painter/decorator (19%) and 1 in 8 have previously worked as a carpenter/joiner (13%) or ceiling fixer (13%).

Figure 11: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	MW 2018/19 %	UK 2018/19 %
Labourer/General operative	40	34
Painter/decorator	19	7
Carpenter/joiner	13	19
Ceiling fixer	13	5
Banksman/Banksperson	9	6
Dryliner	9	8
Bricklayer	8	12
Plant/machine operative (e.g. Fork lift/JCB)	7	10
Floorer	6	4
Plumber	5	5
Site manager	3	5
Mechanical fitter	3	1
Tiler	3	1
Welder	3	2
Supervisor/foreman	3	1
Plasterer	2	8
Electrician	2	5
Pipe fitter	2	4
Other	6	8
<i>Unweighted base</i>	<i>39</i>	<i>1328</i>

Q7



Future career plans

Thinking about their future plans in construction, two-thirds of migrant construction workers would like to carry on in the same trade or occupation (68%); a fifth would like to change their trade/occupation (20%); and a very small minority would like to leave construction (1%). The remainder are not sure (11%).

Compared with the UK average, migrant construction workers are less likely to want to carry on as they are (80% across the UK) and more likely to want to change their trade/occupation (10% across the UK).

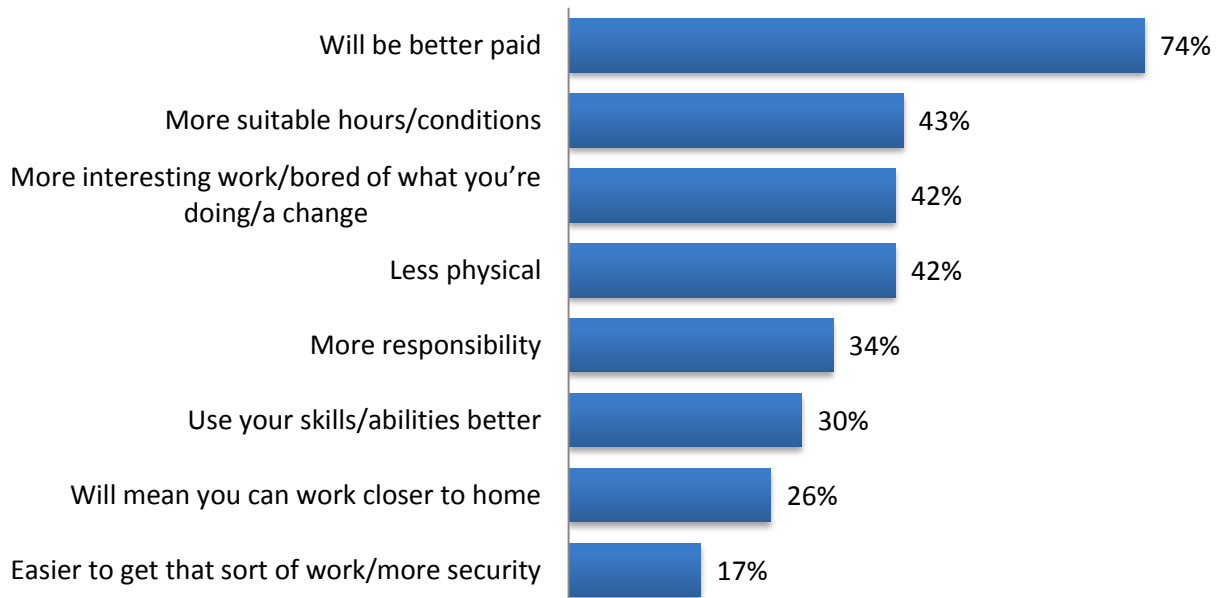
Amongst those who would like to change trade or occupation, migrant workers are most likely to want to be a site manager (46%), with carpenter/joiner as the next most frequently mentioned trade or occupation (15%), followed by ceiling fixer (9%), electrician (9%), supervisor/foreman (8%) and plant/machine operative (5%).

In three-quarters of cases where migrant construction workers would like to change trade or occupation, they believe this will require further training or qualifications (76%). This compares to a higher proportion among migrant workers in 2015 (84%) and across the UK in 2018/19 (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst migrant workers that they will be better paid (74%), while around two-fifths believe they would have more suitable hours/conditions (43%), more interesting work (or that they are bored with what they are currently doing) (42%), or less physical work (42%). Slightly fewer (37%) want more responsibility (34%) and/or wants to use their skills/abilities better (30%). Around a quarter (26%) hope it will mean they can work closer to home.

Figure 12: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation * caution: small sample base



Unweighted base = 13 Q36



Qualifications and skills

This section of the report explores migrant construction workers' qualification levels and other accreditations. The issues covered in this section include:

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

Construction skill cards and certificates

When asked which type of construction skill certificate or card they currently hold (e.g. CSCS or CSR) just 2% of migrant construction workers (2% across the UK) say they do not hold any card. In total, therefore, 98% of migrant workers hold at least one type of skill card or certificate that provides evidence to construction sites that they have received a certain level of health and safety awareness training. This compares with a UK average of 97% and 97% of migrant workers in 2015.

In terms of the type of skill card or certificate held by migrant construction workers the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (91%), as it was in 2015 (89%). Around 1 in 10 holds the CPCS (Construction Plant Competence Scheme) card/certificate (9%).

Figure 13: Type of skill card/certificate held

Base: All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
CSCS (Construction Skills Certification Scheme) (GB)	91	89	85
CSR (Construction Skills Register) (NI)	1	2	3
CISRS (Construction Industry Scaffolders Record Scheme)	3	2	3
CPCS (Construction Plant Competence Scheme)	9	8	11
Other	3	3	4
<i>Unweighted bases</i>	<i>79</i>	<i>352</i>	<i>4048</i>

Q12



Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 14 summarises the types of cards held by migrant workers, with the CSR card colours split into sub-levels. Overall, amongst migrant workers, 4% of CSCS card holders have Red Trainee cards and 5% have Red Experienced worker cards; half of CSCS card holders have Green cards (50%) and a quarter have Blue cards (23%).

Figure 14: 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	5	Red - Trained Plant Operator	0
Green - construction site operative card for general site workers	50	Green - Construction Operative (for general site workers)	0
Blue - skilled	23	Blue - Operative/ Craft	39
Gold - supervisor card	0	Gold - Craft/Supervisor Card	0
Gold - Advanced craft/skilled worker	1	Gold - Advanced Scaffolder	0
Black - contracts manager card	4	Black - Senior Managers Card	0
Academically Qualified Persons Card	2		
Other	9	Other	0
Unsure	1	Unsure	61
<i>Unweighted bases</i>	69		2

Q13/Q14



Construction qualifications held

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

Overall, 67% of migrant construction workers say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 83% in 2015 and 72% of all UK construction workers in 2018/19.

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, three-quarters of migrant construction workers reported holding some sort of construction-related qualification at the time of interview (75%), compared with a lower proportion in 2015 (43%). Migrant construction workers were slightly more likely to hold some sort of construction-related qualification at the time of the interview than the UK average (72% across the UK).



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 15 summarises the types of qualifications that migrant 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 migrant construction workers are NVQ/SVQ qualifications (39%), which is higher than the proportion reported in 2015 amongst migrant workers (26% in 2015) but lower than the UK 2018/19 average (58%). Just 5% of migrant construction workers with qualifications hold City & Guilds qualifications, as in 2015, but they are less likely than the UK average (14%) to hold these qualifications in 2018/19. Another 5% hold an apprenticeship, which is a higher proportion than in 2015 and similar to the UK 2018/19 average (6%). Migrant workers are more likely to hold a degree than UK/ROI nationals (12%, compared with 7%) and this proportion was just 3% among migrant workers in 2015.

Figure 15: Main type of qualification held

Base: Workers with qualifications (valid responses)

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
NVQ/SVQ	39	26	58
City & Guilds	5	5	14
Apprenticeship	5	2	6
HNC/HND/BTEC Higher	1	<0.5	6
Degree	12	3	7
Other	50	4	24
<i>Unweighted bases</i>	37	289	2122

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, 2 in 5 migrant construction workers believe they would benefit from some form of training in basic skills (41% cf. 34% in 2015). This is a higher proportion than the UK 2018/19 average (11%).

In terms of the type of training required, migrant workers are most likely to need further training in speaking English (36%) with writing (13%), reading (9%) and Maths (5%) being less frequently reported.

Figure 16: Self-assessed need for training in basic skills

Base: All respondents

	MW 2018/19	MW 2015	UK 2018/19
	%	%	%
ANY	41	34	11
Reading	9	12	5
Writing	13	12	5
Speaking English	36	26	6
Maths	5	6	5
<i>Unweighted bases</i>	79	352	4048

Q37



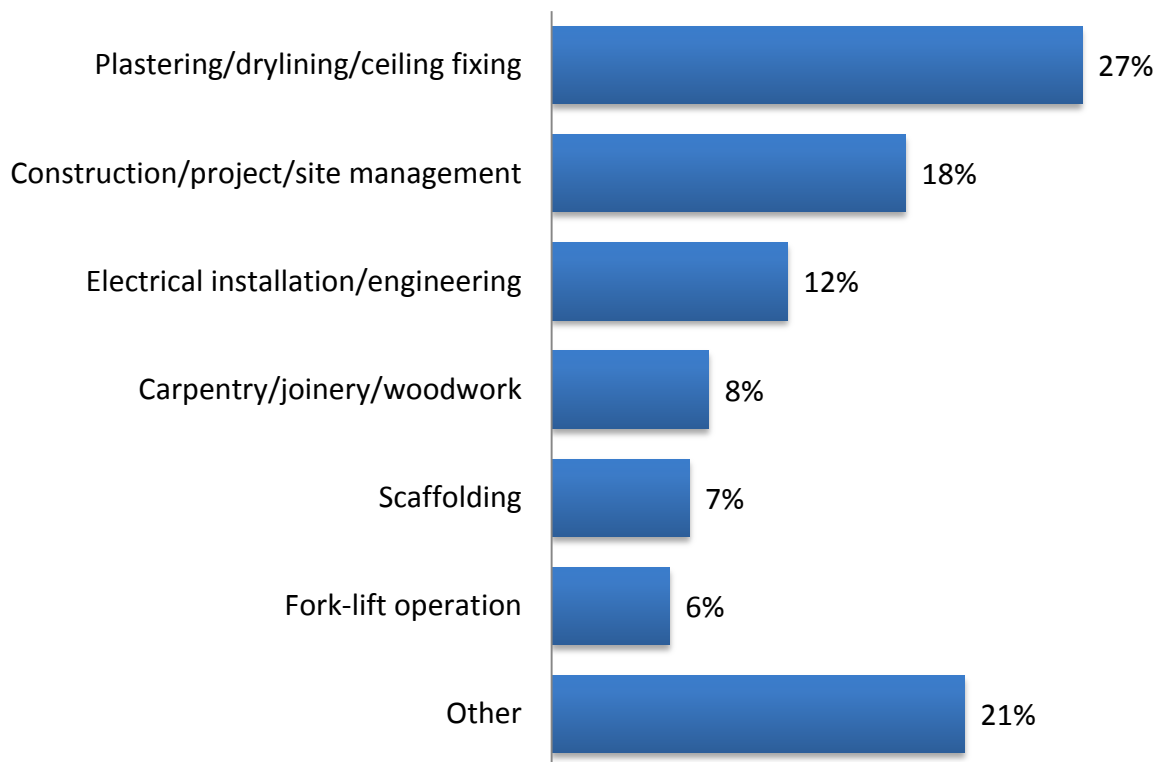
Current study for additional construction qualifications

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

Of those who are currently studying for a qualification, the most popular type of qualification specified is an NVQ/SVQ (26%). In terms of the subject of the qualifications being worked towards, plastering/drylining/ceiling fixing (27%), followed by construction/project/site management (18%) and electrical installation/engineering (12%) are most popular, as Figure 17 illustrates.

Figure 17: Subject of qualification being worked towards

Base: Where working towards a qualification



Unweighted base = 13 Q19



Supervisory and managerial qualifications and training

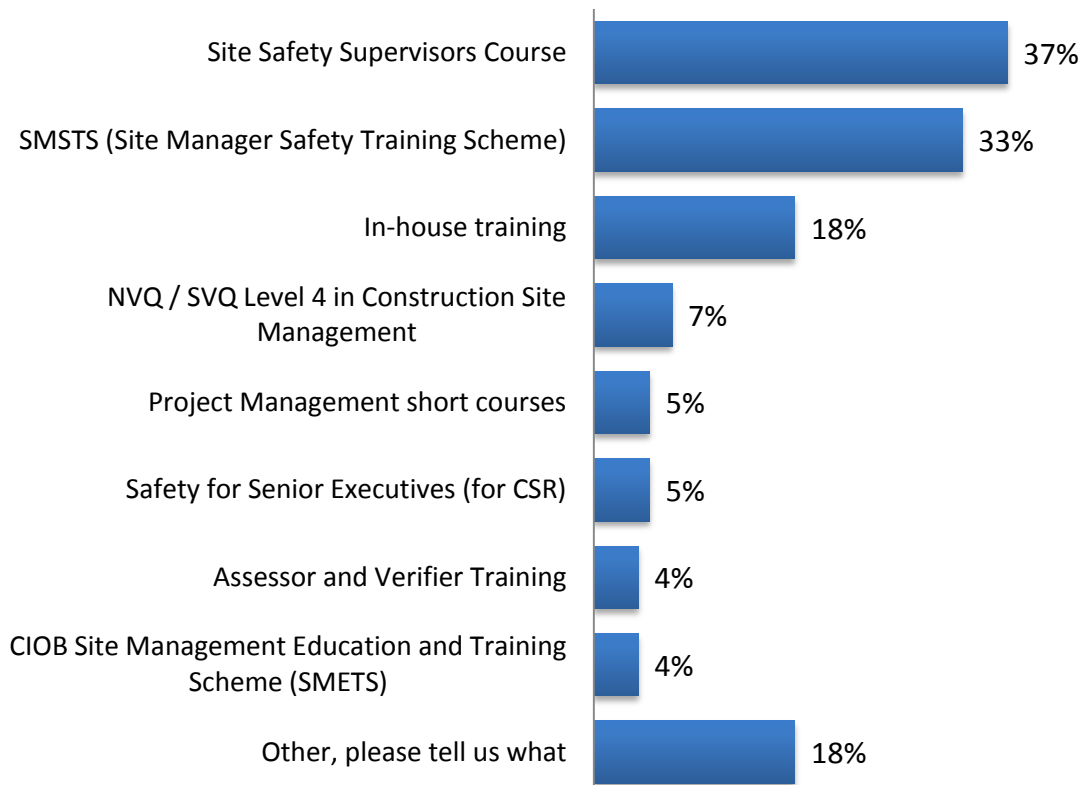
As reported earlier, around a quarter of migrant construction workers sampled perform a supervisory or management role at their site (28%). Amongst those who do not currently perform supervisory/management roles, 1 in 5 want to become a supervisor or manager in the future but have not done it before (19%) and a further 12% want to be a supervisor/manager and have done it before. A third of migrant workers who are not currently managers/supervisors are unsure as to whether they'd like to be one in the future (33%), while a slightly higher proportion are certain that they do not want to be (36%).

More than 1 in 3 migrant construction workers (37%; 34% across the UK) have received any 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 18. Site Safety Supervisors Courses (37%) is most frequently mentioned, with a third of those that have received training mentioning SMSTS (33%). One in six mentioned in-house training (18%).

Figure 18: Types of managerial/supervisory training undertaken

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



Unweighted base = 26 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 19 below.

Similarly to the UK construction workforce as a whole, the vast majority of migrant construction workers (98%) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

One in six migrant workers (16%) holds a skill card/certificate but have no other construction qualification. This is lower than in 2015 (49%) and lower than the UK average (22%).

Figure 19: Qualification status summary

Base: All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	98	98	99
Holds a formal construction qualification or a skills card/certificate	98	98	98
Holds a skills card/certificate	98	97	97
Holds a skills card/certification but no other qualification	16	49	22
Working towards a qualification	13	12	15
<i>Unweighted bases</i>	79	352	4048

Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. A higher proportion of migrant workers than the UK average did not provide sufficient information to allow a qualification level to be allocated (41%, compared with 26%).

Overall, more than half of migrant construction workers providing a response have qualifications equivalent to Level 2 or above (55%, cf. 41% in 2015; 59% across the UK in 2018/19). They are less likely than the UK average to have qualifications equivalent to Level 3 or above (11%, cf. 15% in 2015 and 27% across the UK in 2018/19).



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. Amongst migrant workers, similarly to across the UK as a whole, the most likely reason for working in a region/nation is because their employer sent them there (45%).

Figure 20: Reasons for choosing to work in current location

Base: All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
Employer sent you here	45	48	51
You grew up here/have always lived here	22	16	43
Family reasons	6	7	5
Came to the area to take up this or another job	13	13	3
There are more jobs available in this area	2	11	5
Construction work is better paid in this area	4	10	3
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	9	3	2
Better promotional prospects in this area	3	2	1
<i>Unweighted bases</i>	<i>79</i>	<i>352</i>	<i>4048</i>

Q28

Because they grew up here/have always lived here is less frequently mentioned as a reason for choosing to work in the current location amongst migrant workers compared with across the UK workforce as a whole (22% cf. 43%). In the case of migrant workers, this description of why they work where they do is likely to reflect the fact that they have always been



located in the region in which they currently work as long as they have been working in the UK.

Migrant workers are more likely than the UK average to say they wanted to move to the area for better opportunities and quality of life (9%, compared with 2%).

Just over two-fifths of migrant workers have worked within their current region/nation for their entire construction career (30%), compared with a higher proportion in 2015 (39%) and a higher UK average in 2018/19 (44%). With a further 36% that have remained in this region most of the time, this means the majority of all workers have remained in the region in which they are currently located for all or most of the time (66%).

Figure 21: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
All of your time	30	39	44
Most of it	36	29	33
Around half your time	11	12	9
A small proportion of your time	18	8	10
Only on this job (this is the first site you've been to in this region/nation)	3	7	2
Don't know	2	5	1
<i>Unweighted bases</i>	79	352	4048

Q26/Q27



Home and work locations

We now examine where migrant construction workers are based across the UK and where they work in relation to where they live.

The majority of migrant workers consider their residence in the UK to be permanent (86%) while most of the remainder report that they living in the UK temporarily and their permanent residence is elsewhere in the EU (11%). The remaining 3% preferred not to give this information.

Four-fifths of migrant workers considered where they live at the time of the survey to be their permanent address (81%). This compares with 79% in 2015 and a UK average of 94% in 2018/19.

One in six migrant workers were living at a temporary address for convenience while working in the area at the time they were surveyed (17%) and this compares with 5% of UK/ROI nationals. It is a higher proportion than in 2015 amongst migrant workers (12%).

On average, at the time of the survey, migrant workers lived 17 miles from the site at which they were working. This compares with a UK average of 18 miles. The average in 2018/19 amongst migrant workers is lower than in 2015 (26 miles). Over two-fifths (44%) of migrant workers in 2018/19 lived within 10 miles of the site at which they were working, compared to 37% in 2015.

The average distance between migrant workers' permanent residences and the sites at which they were working at the time of the survey was slightly higher (19 miles) and this is similar to the UK average (21%) but lower than amongst migrant workers in 2015 (27 miles).

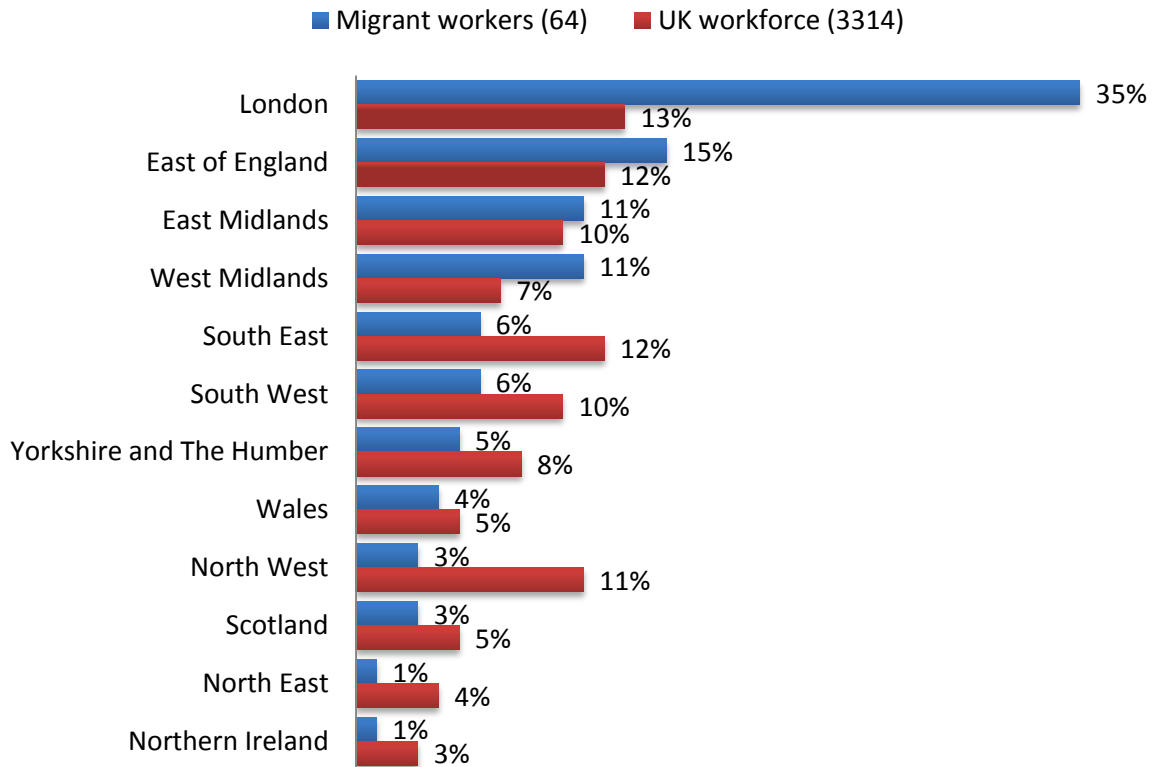


Based on those providing details, a third of migrant workers surveyed lived in London at the time of the survey (35%). They were next most likely to be based in the East of England (15%), followed by the East Midlands and West Midlands (both 11%).

Figure 22 summarises regions/nations in which migrant workers were living at the time of the survey, compared with the UK construction workforce as a whole.

Figure 22: Region/nation in which workers currently live

Base: All respondents



Q52/Q54

In terms of where migrant workers have a permanent address, they were slightly less likely to have a residence in London and the West Midlands compared with where they were living at the time of the survey (33% and 6% respectively). They were likely to have been travelling into the West Midlands from the East Midlands (13% have a permanent address there) and into London from the South East (7%).



When asked the furthest distance they have travelled from their permanent home address to a work site in the last 12 months, the average was 46 miles. This is a shorter distance than the UK average (54 miles). Compared with the UK construction workforce as a whole, migrant workers were more likely to report that the furthest distance they have travelled to a site from their home was no more than 20 miles (40%, compared with 26%). Just 11% have travelled more than 100 miles to a work site in the last 12 months, compared with a UK average of 17%. Compared with 2015, migrant workers have worked closer to their permanent home address in the last 12 months (27% had travelled up to 20 miles at most; 20% had travelled more than 100 miles).

Most migrant construction workers anticipate that their next job will allow them to travel from their permanent home address on a daily basis (87%). This is a similar proportion to the UK average (84%), but is higher than the proportion reported in 2015 among migrant workers (67%).

When asked about the last construction site they worked on, prior to the site they were working at when interviewed, London was by far the most frequently mentioned (41% of migrant workers who had worked on another site before). The South East was the next most frequently cited (12%), followed by the West Midlands (9%).

Three in ten migrant workers had moved to a different region/nation when taking up their current job (30%). Thus, the majority (65%) had remained in the same region (the remaining 5% had not had a previous job in construction). This compares with UK averages of 22%, 69% and 9% respectively.

More than two-fifths of migrant workers studied or trained for their first construction qualification in a different region/nation to the one they were based in when interviewed (43%). This is a significantly higher proportion than the UK average (23%).

The highest proportion of migrant workers that had studied for a qualification obtained it in London (37%), with 1 in 6 having studied in a European country other than the UK and the Republic of Ireland.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (39% of all migrant construction workers) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 16% expect to work for less than two weeks; 9% expect another 2 or 3 weeks; 11% between a month and 3 months; 7% between 3 and 6 months; 11% between 6 months and a year and 11% expect to still be working for their current company/agency in more than a year's time. More than a third of the migrant workers who are working on a temporary basis in the region did not know how much longer they could expect to be working for their current company/agency (36%; 38% across the UK).

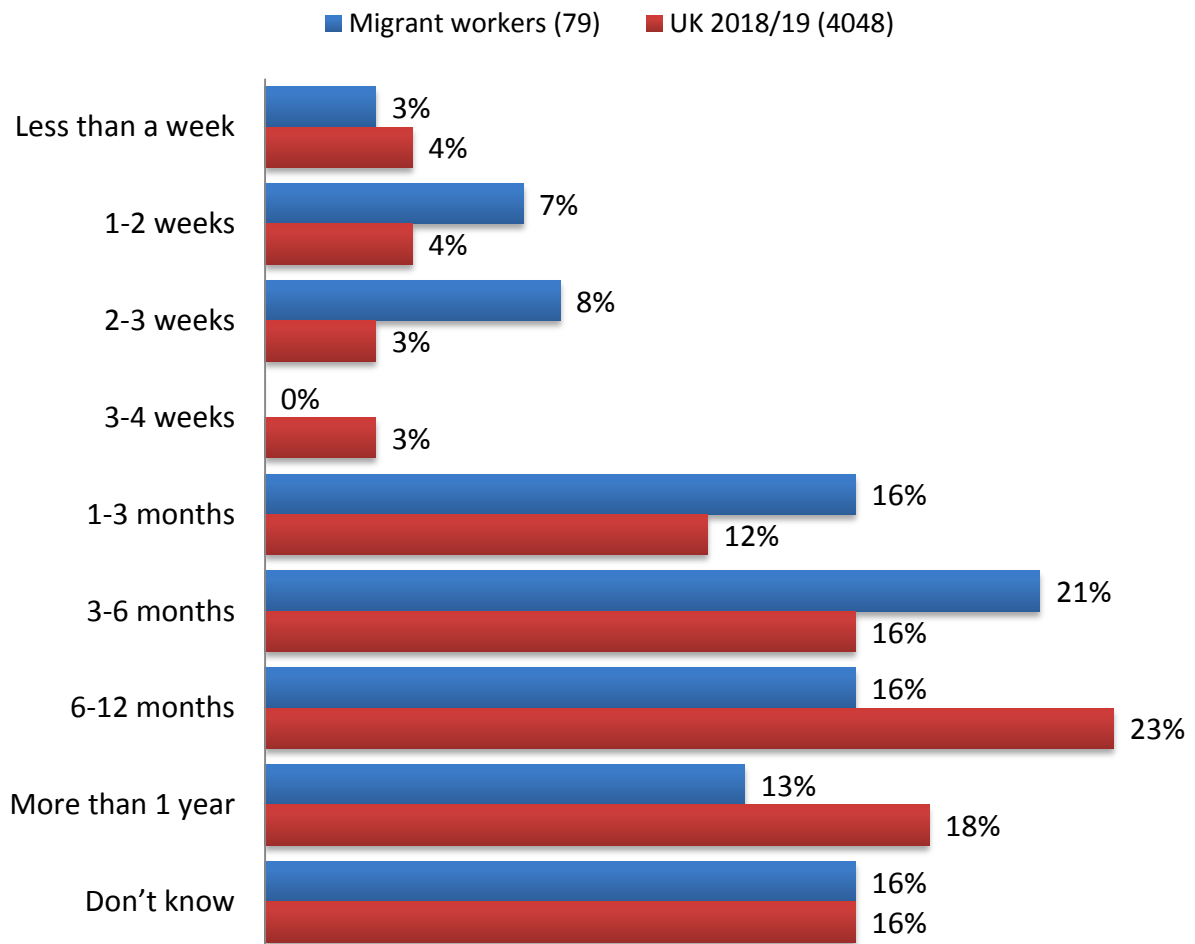


In order to get a measure of workplace stability, all respondents (whether temporary or permanent) were asked to indicate how long in total they expect to work at that specific site during this phase.

Just 1 in 6 migrant construction workers (18% cf. 29% in 2015 and a UK average in 2018/19 of 14%) expect to work on that site for less than a month, including 3% that only expect to be there for a week or less. More than half anticipate being on site for more than a month, but less than a year (53%). 1 in 8 expect to stay on that site for a year or longer (13%), which is similar to 2015 (15%) and compares with a UK average in 2018/19 of 18%. However, in 1 in 6 cases, workers did not know how much longer they could expect to be on site (16% cf. 25% in 2015), indicating that a significant but decreasing minority of migrant construction workers are living with a certain amount of uncertainty and insecurity.

Figure 23: Length of time workers expect to work at that specific site during the current phase

Base: All respondents



Unweighted bases in parentheses
Q24



Sub-sector and sector mobility

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

Sub-sector mobility

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

Following on from 2015, migrant construction workers are most likely to have worked on new housing (69% cf. 73% in 2015). Since 2015 there has been an increase in the proportions of migrant workers that have worked on other types of projects.

Overall, more than two-fifths of migrant construction workers have only worked on one project type (43%), a decrease on 2015 (56%). This suggests more instability with regard to the sub-sectors in which work is available for migrant workers, but also more flexibility and a broadening of experience across this section of the workforce.

Figure 24: Type of projects spent significant periods on

Base: All respondents

	MW 2018/19 %	MW 2015 %	UK 2018/19 %
New housing	69	73	79
Housing repair and maintenance including extensions/loft conversions	43	27	46
Commercial work such as shops, office, pubs etc	50	30	51
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	32	22	45
Public non-housing work such as schools, sports facilities, landscaping	35	30	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	25	16	31
ONE TYPE ONLY	43	56	30
TWO TYPES	18	14	16
THREE TYPES	8	10	14
FOUR TYPES	10	8	12
FIVE TYPES	10	5	13
SIX TYPES	11	5	14
<i>Unweighted bases</i>	<i>79</i>	<i>346</i>	<i>4048</i>

Q3/Q4

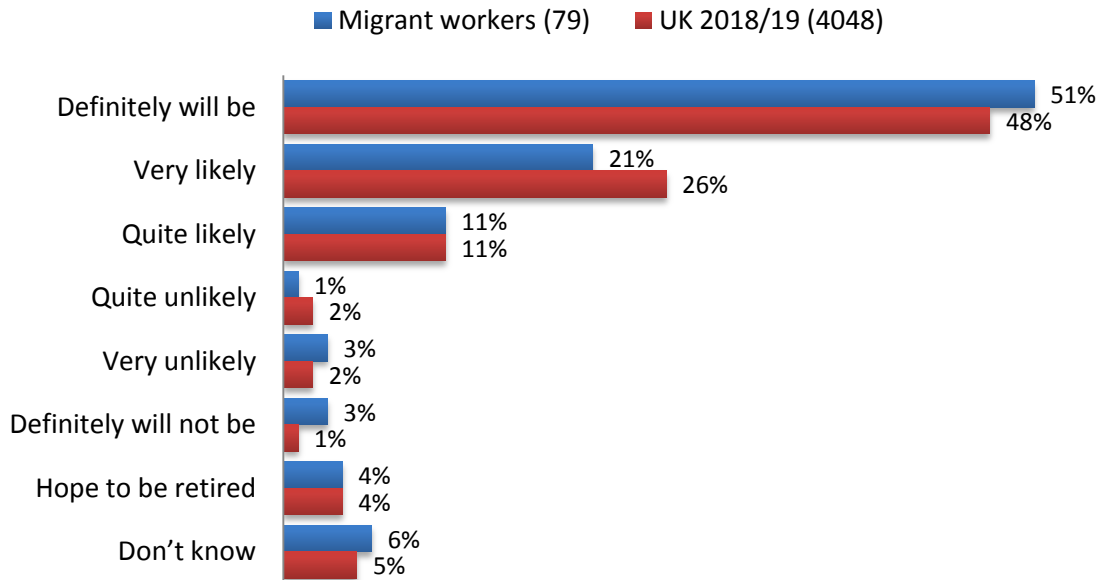


Leaving the sector

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, nearly three-quarters of migrant construction workers (72%) felt it was very likely that they would still want to, which is a similar proportion to the UK average (74%). This included, amongst migrant workers, around half that said they definitely will be (51%) and fifth that think it is very likely (21%). A tenth thinks it is quite likely (11%); 4% consider it unlikely; just 3% say they definitely won't be. A further 4% hope to be retired by then, while 6% don't know.

Figure 25: Likelihood of construction workers still wanting to be working in the construction sector in five years time

Base: All respondents



Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 52% of migrant workers believe they will definitely want to be working in the construction sector, 22% believe it is very likely they will want to be working in the construction sector and 11% believe it is quite likely they will want to be working in the construction sector. Only 8% think on any level that they will not want to be working in the construction sector in 5 years' time, including 3% that hope to be retired.

Overall, as above, 7% of all migrant construction workers 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 and that they would be bored of what they are doing now and need a change (61%, 4 respondents). Other reasons, each cited by 1 respondent, included better use of skills/abilities or expectations of better pay outside of construction.



The migrant construction workforce 2018-19 summary

Across the wide range of issues covered within the 2018/19 survey there are indications of more flexible, adaptive working patterns across the UK construction workforce and this is reflected, if not magnified, amongst migrant workers in the industry. Amongst migrant construction workers there has been an increase in the proportion that are self-employed, from 51% in 2015 to 63% in 2018/19, and a corresponding decrease in the proportion that are directly employed by companies (from 39% in 2015 to 28% in 2018/19). More migrant workers than average across the UK construction workforce and compared with 2015 are employed on a temporary basis in 2018/19 (39%, compared with 28% and 26% respectively).

Migrant workers are more likely than average to have held more than one occupation in construction (55% cf. 36%) and there has been an increase in the extent to which this is the case since 2015 (29%). This diversity may or may not be by choice but the survey indicates that they are less likely to want to carry on as they are than the UK construction workforce on average (68% cf. 80%) and more likely to want to change trades (20% cf. 10%).

Migrant workers in the construction industry, on average, travel shorter distances to their current site than the UK average and compared with 2015. They are more likely than average across the UK construction workforce to be living at a temporary address (17% cf. 5%) so we can assume some are deliberately choosing to live close to work.

Migrant workers appear to be particularly concentrated in London, but there is some evidence of daily movement in and out of the region and uptake of jobs in the wider southern UK, including the South East, South West and East of England. The Midlands is also a significant area in terms of where migrant workers live and work.

The need for more flexible, adaptive working patterns among migrant workers is highlighted by the fact that fewer migrant workers than in 2015 have been involved in just one type of construction project in the last 12 months (43% cf. 56%). However, experience of just one type of project is at higher levels amongst migrant workers than across the UK construction workforce (30%). The flexibility of migrant workers may concern variation in job roles more often than in project types.

At the outset of their careers in construction, migrant workers were more likely to be qualified than UK/ROI nationals (33% cf. 28%) and at the time of the interview were slightly more likely to hold qualifications than the UK average (75% cf. 72%). It was, however, more difficult to categorise qualifications held by migrant workers so it is not possible to directly compare levels and types of qualifications held.

A higher proportion of migrant workers than the UK average had previously been labourers/operatives and painters/decorators, and there has been an increase in the proportion that are site managers now compared to 2015. This suggests that migrant workers represent a range of levels within the construction industry and are by no means a homogenous manual workforce. One in eight of those migrant workers with qualifications holds a degree level qualification (12%), compared with 1 in 14 of those across the UK construction workforce (7%).



The vast majority of migrant construction workers (98%) hold some form of skill card or certificate. Despite being on a par with UK/ROI nationals in terms of their propensity to hold skill cards/certificates and/or qualifications, migrant workers are more likely than UK/ROI nationals to believe they would benefit from training in basic skills (41% cf. 11%) and this is most likely to be with regard to speaking English.



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