# Construction Sector Report

## Safe365 Insights into Safety Culture Maturity

# What's inside?

# Why safety culture matters in Construction?

**Compliance requirements and the systems they drive are essential foundations for occupational health and safety. Yet in construction, a sector that consistently ranks among the most hazardous globally, true safety culture goes beyond compliance. It is about how effectively systems and processes are lived on the ground, the leadership behaviours that shape daily choices, the collective commitment and engagement of every worker and contractor to embed safety in their work.**

A strong safety culture is not confined to the safety function. It defines how people think and act on site, from planning a lift to managing fatigue towards the end of a long shift. It is visible when workers instinctively assess the risks around them, understand the safeguards that make their tasks possible, and take responsibility for protecting themselves and those around them. In a sector built on subcontracting and complex supply chains, this culture is what binds fragmented teams into a single community of care.

The global construction sector has made major advances in technology, design standards, and management systems, yet work-related harm rates have plateaued in many regions. More regulation alone will not close the gap. The missing piece is cultural: how leaders, supervisors, and frontline workers collectively view and value safety.

Safety culture is not a new idea. It is a subset of organisational culture that reflects the attitudes, beliefs, and values that shape how safety is prioritised in practice. Maturity profiling provides a way to benchmark construction organisations against markers of what good looks like, moving beyond a tick-box view of compliance to understand how deeply safety is embedded into operations.

For construction leaders, the message is clear. Safety culture is directly tied to reputation, workforce confidence, and project delivery. Clients, investors, regulators and communities are watching closely. By measuring and actively improving safety culture maturity, construction companies can protect their people, strengthen governance, and create lasting value across global projects.

# We're on a mission to proactively reduce harm globally.

A mission ingrained in our DNA and governed by one key goal — to have 100,000,000 workers working in proactively managed risk environments. Designed to support safety leaders seeking to transform their workplace safety cultures, Safe365 changes the way companies view, evaluate and quantify the value of risk, driving a management-led vs compliance-led approach to proactive risk management.



## Measure

- Conduct on-going assessments of your health & safety maturity

- Achieve a by-division analysis of strongest and weakest business areas

- Benchmark your workplace safety maturity against industry and overall market performance

## Prioritise

- Unlock insights into your weakest areas of safety culture

- Prioritise and present data-led strategic workstreams to your C-Suite and the Board

- Drive ownership and delivery behind a continual improvement workplan
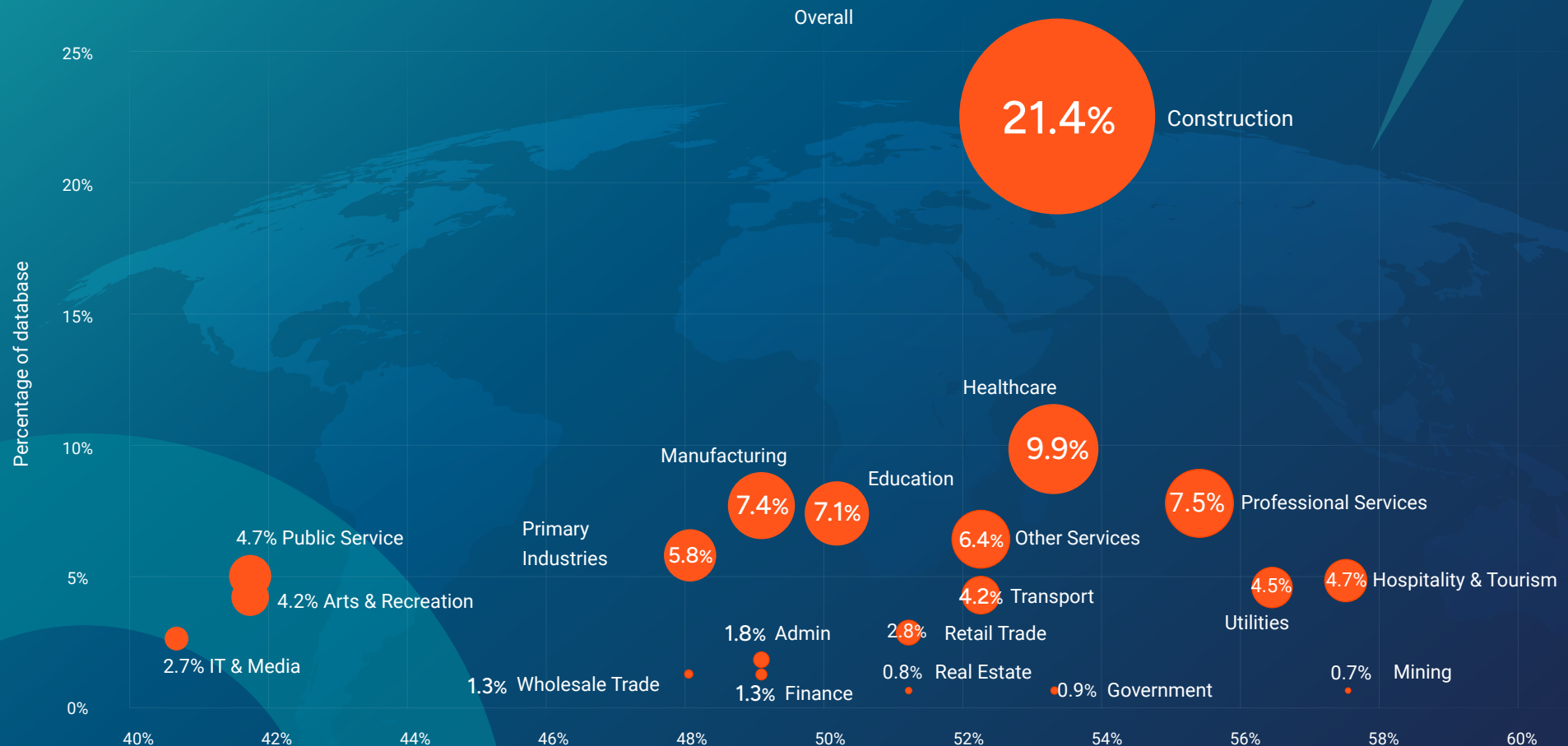
## Demonstrate

- Quantify the value of those continual improvement workstreams with on-going tracking & assessment

- Bring the conversation to a commercial lens, by showcasing not just the human impact but the business impact of your activities

# The make-up of our data.

## Size of the industry in relation to the others

2,672 organisations in sample, across 47 countries.



Percentage of database

25%

20%

15%

10%

5%

0%

Overall

**21.4%** Construction

Healthcare
**9.9%**

Manufacturing
**7.4%** **7.1%**
Education

Professional Services
**7.5%**

4.7% Public Service

Primary Industries
**5.8%**

Other Services
**6.4%**

Hospitality & Tourism
**4.7%**

4.2% Arts & Recreation

Transport
**4.2%**

Utilities
**4.5%**

2.7% IT & Media

1.8% Admin

Retail Trade
**2.8%**

1.3% Wholesale Trade

1.3% Finance

0.8% Real Estate

0.9% Government

0.7% Mining

40%    42%    44%    46%    48%    50%    52%    54%    56%    58%    60%

# How we measure safety culture maturity

**Safe365 breaks safety culture into 82 elements, categorised into 10 modules.**

Our assessment and analysis focus not just on the systems and processes that form a basis for proactive safety cultures, but the degree to which these

a) are part of normative behaviours

b) are valued by all levels of the business and

c) form an ongoing, cohesive feedback loop of continual improvement

## THE OUTPUT

A quantitative value that rates the maturity of each of the 82 elements, summed into an overall safety culture maturity index and supported by clear insights into the biggest opportunities and common themes that will impact your safety culture from across your business.

*The Safe365 assessment is informed by over seven years of research and development, ISO standards, global best practice and industry legislation.*



Module     Elements

INDEX
60%
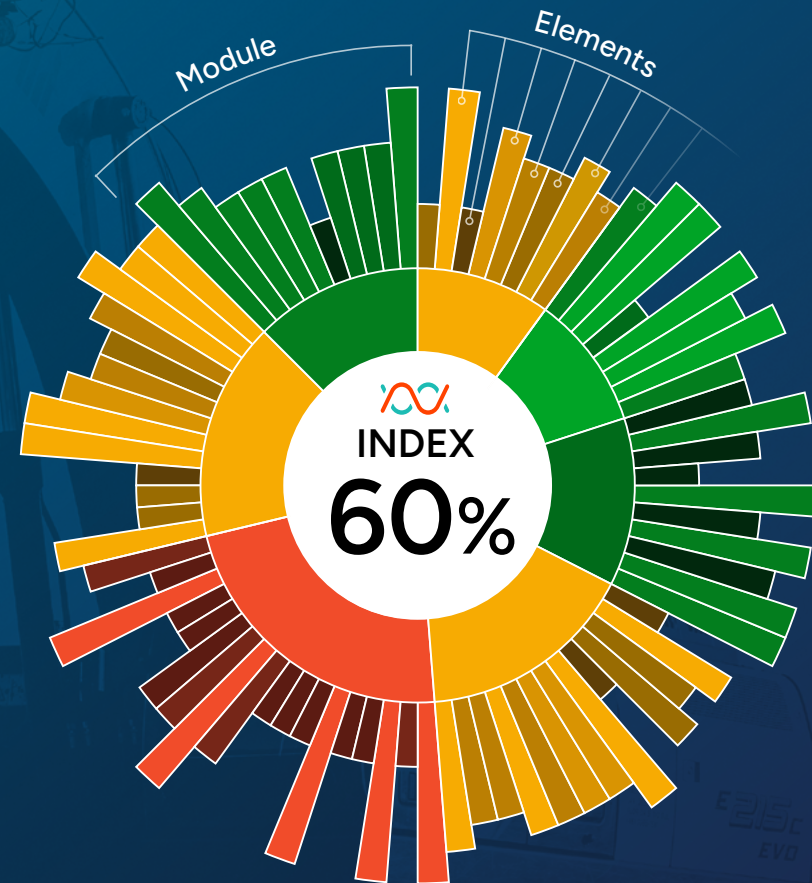
# Our Maturity Scale

We grade each element against our Safe365 safety culture maturity scale. Each milestone has a range of 20% and our aim is to provide the data and insights that will unlock the buy-in and investment you need to reach the next tier.

## Tier Five

**Congratulations!** You've attained an excellent level of health and safety maturity! There's always room for improvement, so don't get complacent and keep your standards high.

## Tier Four

**You're ahead of the curve!** Health and Safety is well established with up-to-date systems, processes and behaviours in the workplace.

### Embedded
INDEX ❯ 80%

## Tier Three

**The foundations have been laid.** Systems and processes are in place and your workforce are practising most aspects consistently.

### Proactive
INDEX 60–79%

## Tier Two

**There's room for growth.** You respond to health & safety matters when needed. Basic systems and processes may be in place.

### Systemic
INDEX 40–59%

## Tier One

**You've made a start!** Very basic systems, processes and behaviours are now in place. It's only up from here.

### Reactive
INDEX 20–39%

### Formative
INDEX ❮ 19%

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

# 1 State of Construction Safety Culture

When mapped against the Safe365 maturity roadmap, the global construction sector averaged a Safety Culture Maturity Index of 54%. This represents a Tier 3 'Systematic' culture and generally means that the basic compliance foundations are in place. Policies exist, inductions occur, and core procedures are broadly understood.

But the data also reveals that construction has not yet consistently demonstrated the practices and leadership behaviours that shift maturity from Systemic (Tier 3) into Proactive (Tier 4) or Embedded (Tier 5).

This is also an unusual profile compared to many sectors, where worker knowledge and engagement outpace leadership capability and system assurance, and raises critical questions.

1. Why do frontline scores trend higher than management knowledge?

2. Why is Verification & Audit persistently weak compared to other modules?

3. And what does the sectors reliance on apprenticeship traditions mean for long-term resilience?
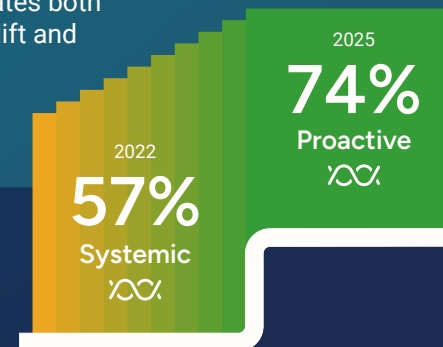
INDEX
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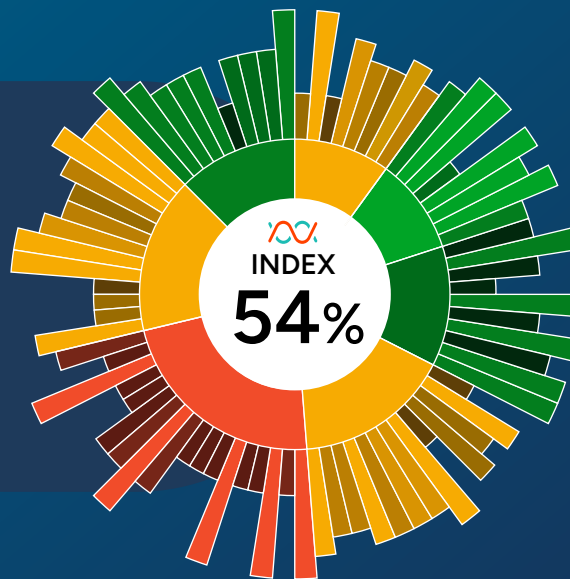
## DATA DRIVEN IMPROVEMENT IN ACTION

These are not abstract findings. They highlight structural vulnerabilities in governance, assurance, and leadership readiness that can directly affect construction project delivery.

Evidence from a large construction business reinforces this picture: in 2022, the company benchmarked at 57% (Systemic). Over three years of Safe365 maturity profiling and targeted interventions, it lifted to 74% (Proactive), with standout strengths in Worker/Contractor Engagement and Management Reporting, but continuing gaps in Director Knowledge and the close-out of audit findings.

This progression demonstrates both the sector's potential for uplift and the stubborn challenges that remain.

2025
74%
Proactive

2022
57%
Systemic

# 2 Construction Industry represents a systemic safety culture

### The average safety culture maturity index for the industry is 53%.

This represents a sector with strong focuses on safety systems and processes that are practiced consistently across the workforce.

**Construction average**

53%

**All Industries Average**

51%

The Construction Sector holds position 5 out of 20 industries in maturity.

| Industry | % |
|---|---|
| Overall average | 51% |
| Hospitality | 57% |
| Mining | 57% |
| Utilities | 56% |
| Professional Services | 55% |
| Construction | 53% |
| Govt | 53% |
| Healthcare | 53% |
| Other Services | 52% |
| Transport | 52% |
| Real Estate | 51% |
| Retail Trade | 51% |
| Education | 50% |
| Administrative | 49% |
| Finance | 49% |
| Manufacturing | 49% |
| Primary Industries | 48% |
| Wholesale Trade | 48% |
| Arts & Rec | 42% |
| Public Service | 42% |
| IT & Media | 41% |

0%  10%  20%  30%  40%  50%  60%  70%  80%  90%  100%

Tier One Formative | Tier Two Reactive | Tier Three Systemic | Tier Four Proactive | Tier Five Embedded

# 3 Frontline capability outpaces system strength

The majority of construction organisations sit in the Systematic Tier (52%) and Proactive tiers (42%). This indicates that most compliance focused foundations to model regulations and international standards are in place and more proactive behaviours are emerging. Yet only two per cent reach Embedded maturity, where safety is truly integrated into daily business and decisions.

At a module level, the data highlights three clear insights;

1. Verification and Audit* is the weakest module at 47%, leaving boards exposed to blind spots in high-risk activities.

2. Worker Knowledge (79%)* and Worker Engagement (84%)* are sector strengths

3. Leadership maturity* lags behind frontline workers

This creates an unusual profile compared to other sectors; where worker knowledge, worker engagement and cultures & behaviour modules are all well above the all industries average, compared to health and safety management systems, management knowledge, and director reporting that are all closer to average.



Safety Culture Maturity Index

## FOR LEADERS THE OPPORTUNITY IS CLEAR.

**Leverage the strong worker knowledge and engagement that we know are critical for proactive and embedded organisations while closing leadership and assurance gaps.**

By embedding Critical Control Management, standardising inductions and close-out processes, and strengthening governance visibility, construction organisations can shift from Systematic to Proactive, and Proactive to Embedded, delivering safer projects with greater certainty of worker welfare and improved reputational value for employers of choice.

# 4 Strengths and Opportunities for Construction by Module

## Construction vs All Industry Benchmarks

| MODULE | ALL INDUSTRIES % | CONSTRUCTION % | DELTA (PP) |
|---|---|---|---|
| Director Knowledge | 53.5 | 54.8 | +1.2 |
| Management Knowledge | 50.5 | 54.2 | +3.6 |
| Worker/Contractor Knowledge | 58.6 | 64.3 | +5.7 |
| Health & Safety Management System | 63.2 | 66.0 | +2.8 |
| Verification & Audit | 44.2 | 46.8 | +2.6 |
| Emergency Preparedness | 52.8 | 51.0 | -1.8 |
| Health & Safety Data Collection | 54.1 | 59.8 | +5.7 |
| Management Reporting | 63.3 | 62.5 | -0.8 |
| Worker/Contractor Engagement | 56.9 | 61.6 | +4.7 |
| Culture & Behaviours | 54.8 | 59.2 | +4.4 |

## SECTOR STRENGTHS

Construction performs strongly in **Worker and Contractor Knowledge** (62%) and in **H&S Data Collection** (60%).

This represents strong understanding of safety and a willingness to report, which may reflect the strength of apprenticeship pathways, on the job training, consistent use of inductions and toolbox talk processes.

## SECTOR WEAKNESSES

Two modules stand out as critical weaknesses.

**Emergency Preparedness** at just 51% lags the global benchmark, with drills too often focused only on fire scenarios rather than the broader risks of heat stress, working from heights, uncontrolled energy, fatigue, and confined spaces.

**Verification and Audit**, at just 47%, is the lowest-scoring module, leaving boards uncertain whether critical controls will function when needed most.

## FOR BOARDS AND EXECUTIVES, THE MESSAGE IS CLEAR.

**Construction has the right foundations, but systemic risks remain.**

Closing gaps in emergency readiness and verification is essential, especially in regions like the Middle East, where heat, fatigue, and complex subcontracting amplify risk. Those who strengthen these areas will not only improve safety outcomes but also demonstrate stronger governance, build investor confidence, and gain a competitive advantage in a sector under constant global scrutiny.

# 5 Verification & Audit – Construction's Weakest Link

Across the Safe365 data set, Verification & Audit is where construction businesses consistently stumble. Averaging just 47%, this is the weakest performing module across the sector, and the element scores tell a sharper story:
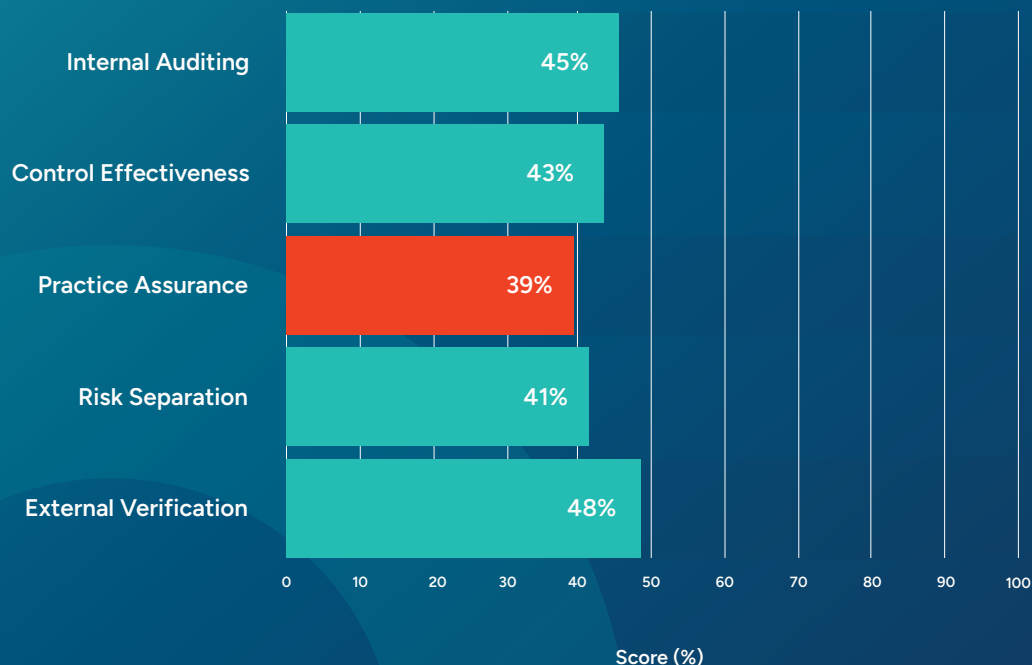
In simple terms, half of the controls construction leaders assume are working are unlikely to stand up under real-world stress.

This imbalance matters. Frontline engagement and worker knowledge in construction are strong, but without assurance that critical controls actually work in practice, directors cannot have confidence that risk is being managed.

Independent studies have reached the same conclusion: critical control reliability on large projects is often below 50%, meaning the difference between documented compliance and genuine safety can be stark.

### FOR BOARDS, THIS SHOULD SOUND AN ALARM.

Paperwork and checklist audits prove that systems exist; they do not prove that those systems are effective when lives are on the line. The governance blind spot is particularly acute in high-energy domains such as lifting operations, the plant/people interface, and working at height, where failures in a single control can cascade into catastrophe.

The opportunity for construction leaders is to move from compliance auditing to evidence-based assurance. This involves stress-testing controls under real-world conditions, commissioning independent verification, and integrating the closure of audit findings into board reporting. Organisations that make this shift rapidly lift their maturity from the "systematic" tier into proactive leadership, with a measurable reduction in high-severity incidents.

| Element | Score (%) |
|---|---|
| Internal Auditing | 45% |
| Control Effectiveness | 43% |
| Practice Assurance | 39% |
| Risk Separation | 41% |
| External Verification | 48% |

Score (%)

INDEX **54%**

## 6 Critical Controls

So what does good look like? The benchmark is shifting from document audits to field verification. Critical Control Management (CCM), pioneered in mining, has shown tangible reductions in serious events by testing controls for effectiveness, not just presence. Emerging construction research proposes and validates similar CCM approaches for our sector, offering a pathway to close the audit gap.

### PRACTICAL ACTIONS:

1. Adopt a Critical Control Management program with routine effectiveness checks.

2. Introduce project-level close-out KPIs for audit findings and report them at the board level as a leading indicator.

3. Commission independent practice assurance on rotating set of critical risks such as lifting, temporary works, and plant operations
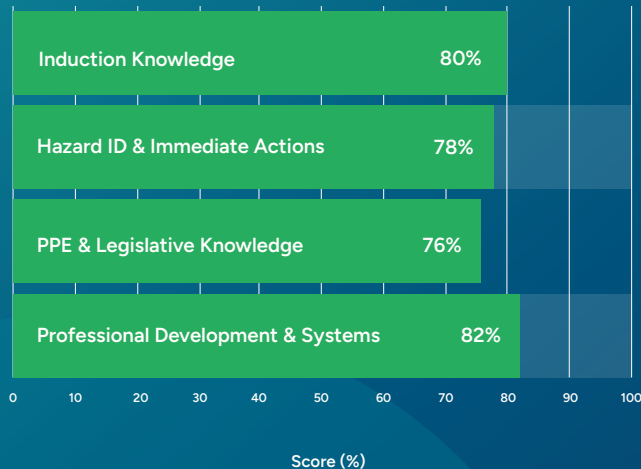
These steps move organisations beyond compliance to genuine assurance. They create visibility of whether controls are functioning when lives depend on them and give boards confidence that their governance obligations are being met in substance, not just on paper.
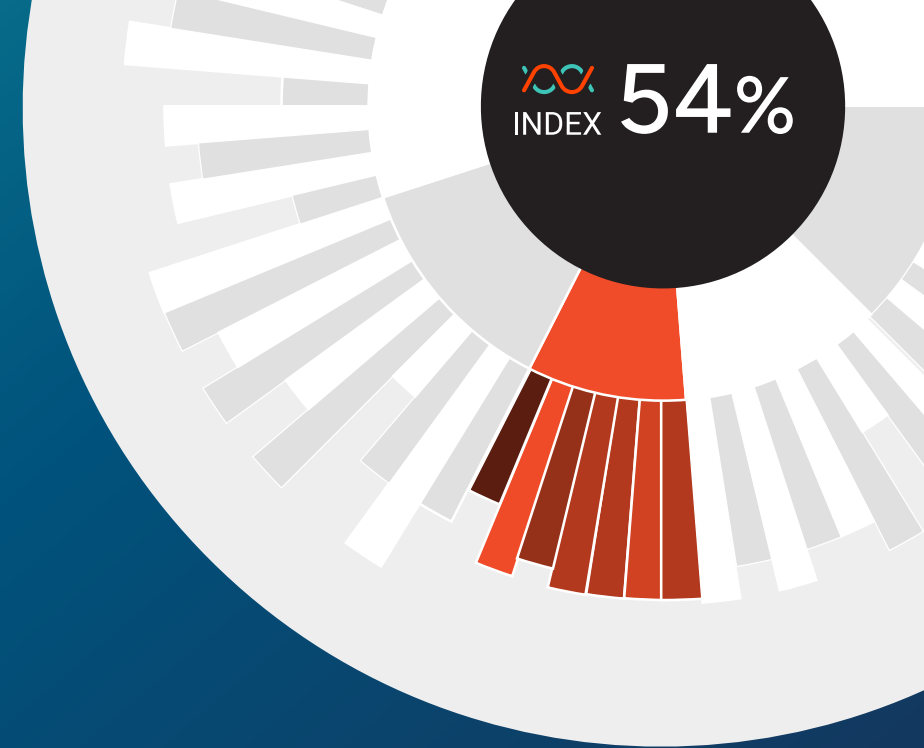
# 7 Worker Strength vs Leadership Gap

Safe365 data confirms that construction's strongest asset is its workforce. At the element level, workers and contractors demonstrate high competence and awareness.
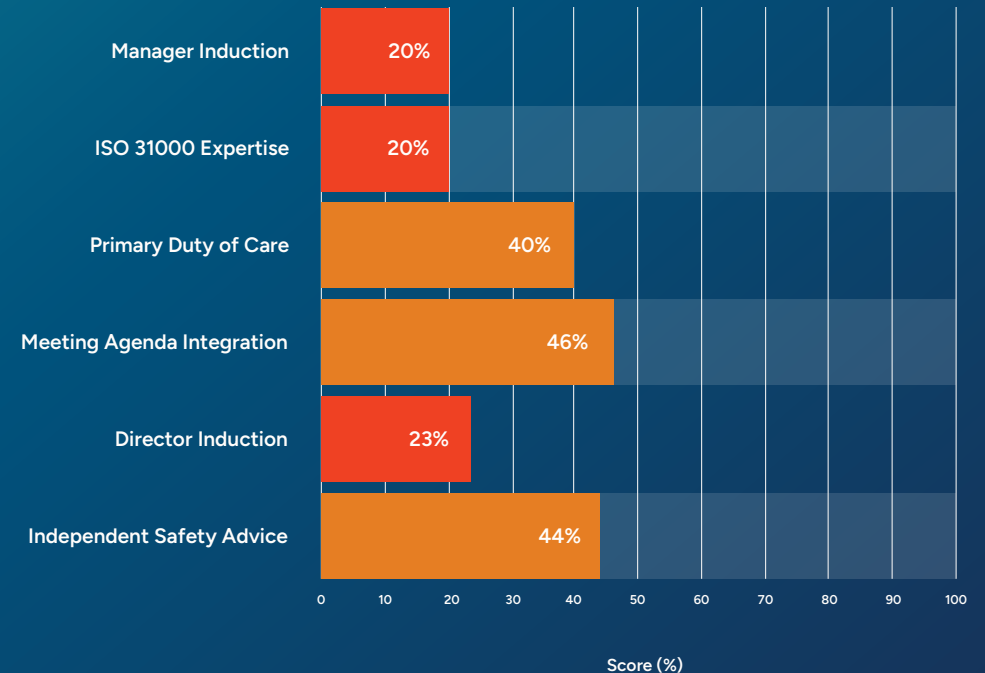
## WORKER STRENGTH

| Element | Score |
|---|---|
| Induction Knowledge | 80% |
| Hazard ID & Immediate Actions | 78% |
| PPE & Legislative Knowledge | 76% |
| Professional Development & Systems | 82% |

Score (%)

These results reflect a frontline that is consistently trained, capable of recognising risks, and confident in applying safe practices. A major factor in this strength is the industry's apprenticeship and trade training system, which embeds hazard awareness and safe work practices early in careers and reinforces them through supervision and repeated induction on site.

In contrast, leadership maturity lags. Element scores for management and directors are markedly weaker.

## LEADERSHIP GAP

| Element | Score |
|---|---|
| Manager Induction | 20% |
| ISO 31000 Expertise | 20% |
| Primary Duty of Care | 40% |
| Meeting Agenda Integration | 46% |
| Director Induction | 23% |
| Independent Safety Advice | 44% |

Score (%)

Unlike apprentices, who benefit from structured learning and mentoring, managers and directors often have no equivalent onboarding or governance training, leaving a significant capability gap.

## THE IMPLICATION IS CLEAR.

Construction workers are well-prepared and engaged, but the absence of structured leadership development and governance education creates a ceiling on cultural growth. Progress beyond the proactive tier of maturity requires leaders who are as well-prepared and accountable as the workers they oversee. Bridging this leadership gap will unlock the next stage of development, ensuring safety is not only practised on site but fully embedded in organisational governance.

# 8 Just Culture

## Within the Culture and Behaviour module, the construction sector scores only:

**46%**

**60%**

Willingness to Report Incidents and Near Misses

All Industry Average

This makes it one of the sector's weakest elements. While construction workers often demonstrate strong technical knowledge and engagement, the maturity data shows that trust in reporting to management is fragile and inconsistent.

This gap matters. A low score in Willingness to Report signals that hazards, near misses, and unsafe practices are often left unrecorded. Leaders are therefore deprived of the very data they need to anticipate risks and prevent harm. Research supports this interpretation. Reason's foundational work on organisational accidents shows that weak reporting cultures create "latent conditions" where risks accumulate unnoticed until they trigger serious incidents. This may be reflected in the construction sector where the Management Reporting module scores well, however the data used may be incomplete, and fail to provide the true scale and types of risks arising.

The Safe365 maturity model also flags willingness to report as a key priority, and a strategic inflection point between systematic compliance and proactive learning cultures.

### FOR BOARDS AND EXECUTIVES, THIS IS A GOVERNANCE SIGNAL THAT CANNOT BE IGNORED.

Worker training and hazard awareness are strong in construction, but unless leaders cultivate a just culture where reporting is safe, valued, and acted upon, those strengths will not translate into cultural maturity. The opportunity is to embed fair accountability, close the loop on reports, and make it clear that speaking up is a contribution to organisational learning, not a risk to the individual.

INDEX **54%**
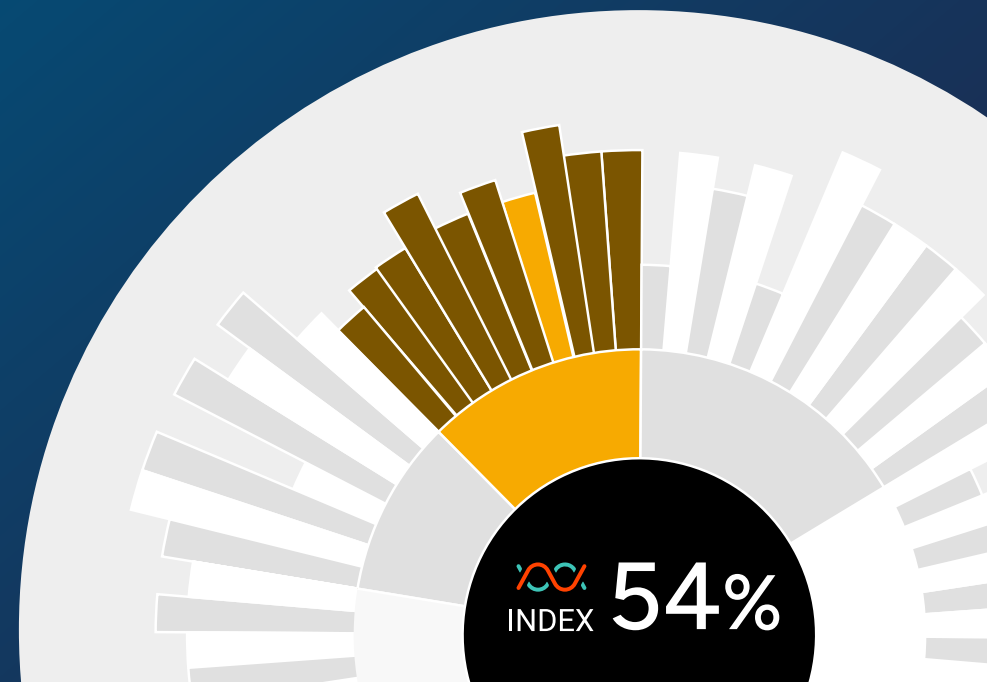
## A LARGE AUSTRALIAN CONSTRUCTION GROUP

# From Systemic to Proactive Safety Maturity: How an Australian Construction Group grew safety culture by 17 percentage points over three years.

**Facilitator reflection:**

*"Back in 2022, frontline staff only knew the rules that affected them day to day. By 2025, they could explain the purpose behind those rules and how they linked to wider business performance. That was the biggest change – workers living and breathing safety culture."*

## IMPACT



**74%**
SAFETY CULTURE MATURITY INDEX

**+17%**
Maturity score:
57% in 2022 –
74% in 2025

**95%**
Management Reporting

**84%**
Worker Engagement

**85%**
Verification & Audit

**Facilitated sessions in 2022 revealed very limited knowledge of safety systems among frontline staff.**

By 2025, with an embedded ISO 45001 system, workers could clearly articulate not just what safety processes were required but why they mattered for the business as a whole.

This cultural shift – from compliance to understanding – has driven fewer critical risk deviations, reduced rework, and greater workforce confidence, particularly among apprentices and younger staff.

## PROBLEM

- Director and Management Knowledge was weak

- Emergency drills were narrow in scope

- Worker voice was strong but was not reaching board level

- Limited knowledge of health and safety management systems, with frontline workers focused only on immediate operational risks
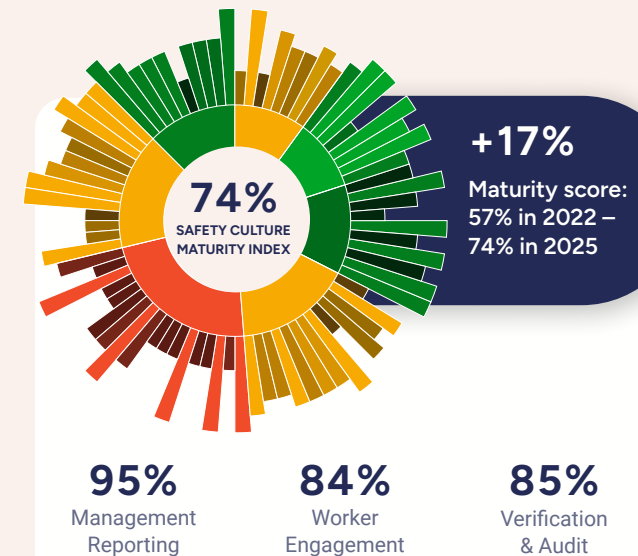
## SOLUTION

In 2022, the business committed to aligning with ISO 45001 and implementing an integrated management system.

This was supported by extensive training across the workforce and the adoption of Safe365 maturity profiling. Governance workshops clarified board responsibilities, inductions were standardised across sites, and digital tools created visibility of safety actions in real time.

Campaigns encouraging stop-work authority gave frontline teams confidence to halt unsafe operations.

safe365®
Intelligent Safety Culture

# To have a conversation on proactive safety leadership, and how we can help, contact mark@safe365global.com

COSTAIN

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