

Workforce Mobility and Skills in the UK Construction Sector

North West Report

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1 Background, Objectives and Methodology

1.1 Introduction

ConstructionSkills commissioned BMRB to undertake a survey of construction workers to provide reliable data on the nature of the workforce in the UK and the Republic of Ireland (ROI) with regard to their competence/qualification levels and the extent of occupational and geographic mobility within the workforce. This report presents the results of the survey conducted in the North West.

A separate technical appendix is available which includes a full technical report and a copy of the questionnaire used.

Where available, results from the 2007 survey have been compared with those from similar previous research conducted by IFF Research in 2004¹.

1.2 Key objectives of the research

The overall aim of the study was to provide reliable data on the nature of the construction workforce in regard to their competence/qualification levels and the extent of occupational and geographic mobility within the workforce. More specifically, the key objectives of the research were to examine:

- the qualification and skill levels of the construction workforce in the UK and ROI
- the extent to which the workforce in each region is constituted of workers originating or living in other parts of the UK (or further afield), and general mobility and travel to work issues
- the nature of the mobile workforce/'imported' workforce in terms of their occupations and their competence/qualification levels
- 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, and related to this the extent to which managers have received training specifically to enhance their managerial skills.

The focus for the survey was on site-based manual occupations, thus excluding associated clerical and sales occupations and professions such as architects, surveyors and engineers.

¹ Comparative findings should be treated as indicative only due to key differences in the types of sites visited in 2004 and 2007. The profile of sites visited showing differences by size and category are included in the technical report.

1.3 Methodology

The key elements of the research approach were as follows:

1.3.1 Desk research

Prior to undertaking primary research a period of exploratory desk-based research was undertaken to examine the scope of information currently available; to identify other surveys and consultations to ascertain what can be learnt from these, and to ensure that any subsequent fieldwork was relevant and informed. The conclusions drawn from the desk research exercise were:

- there are studies covering similar issues to this study, however the target respondents of these studies tended to be employers
- the Labour Force Survey (LFS) is conducted among workers and covers similar issues as this study, however it is not specific to the construction industry
- there is little reliable information on the mobility of workers. The only exception is the LFS but it does not cover certain issues relevant to the construction workforce such as temporary accommodation, or where workers received training
- the desk research confirmed the need for detailed information from construction workers and for more information on workforce mobility in the UK and ROI.

A copy of the presentation summarising the desk research exercise can be found in the technical appendix.

1.3.2 Sampling

For the UK sample a list of current construction projects over £250,000 in value was drawn from Glenigan, an Emap service detailing current and forthcoming construction projects in the UK.

From the projects identified as being eligible for inclusion in the survey (the steps taken to select eligible records from Glenigan are detailed in the technical report), a stratified random sample of 99 postcode districts (e.g. NR2) was drawn to produce a representative sample of locations across the UK. For each selected district six eligible projects were identified. Projects were selected on the basis of value, 35% of sites with a value of less than £1million and 65% of sites with a value of more than £1million. In 2004, the survey focused on sites valued at over £1 million and the sampling process aimed to ensure a mix of sites by stage of development (first six months, midway, last six months). In 2007 the requirement was to also sample sites under £1 million, so this criterion needed to be reconsidered in that light. The 2004 definition of stage of development clearly assumed quite large, lengthy projects, appropriate for sites with minimum value of £1 million. With the introduction of smaller sites, some would be completely finished in six months. Therefore it was decided that an appropriate alternative definition would be to select according to value.

Quotas were set on the target number of sites for each region and by value. The target sample profile is described in the technical report.

1.3.3 Telephone survey

A telephone willingness stage was conducted in order to recruit construction projects selected from Glenigan to take part in the research. Interviewers were instructed to identify the best person to speak to about arranging a visit to the construction site and to collect some headline information about the site. Full details of the information collected and number of interviews achieved is included in the technical report.

1.3.4 Site visits

Once permission had been sought to interview at the particular site, the information was forwarded to a local face-to-face interviewer who contacted the site representative to arrange a date to visit. Interviews with construction workers were then conducted face-to-face on site. Interviewing normally took place in a canteen or site office during workers' break periods. In around one in ten cases interviewers were only able to visit the site if they supplied their own personal protective equipment.

A selection of interviewers' experiences of contacting and visiting sites is shown in the technical report.

1.3.5 Challenges

Given the complex nature of this research project a number of challenges arose during the life of the project. Each issue is discussed in detail in the technical report.

1.4 Details of sites covered in the research

The survey results presented in this report are based on fieldwork conducted in the North West from February to July 2007. This consisted of a total of 342 face-to-face interviews with site based workers obtained across 26 sites.

At the analysis stage, weighting was applied to the data to ensure each nation/region was represented in its correct proportions based on the relative size of the construction workforce. Labour Force Survey figures were used for UK regions/areas, (average profiles from the period October 2006 – June 2007). Unless otherwise stated, with the exception of base totals, the figures in this report are based on weighted data. Weighted, the North West accounted for approximately 9% of the UK/ROI workforce.

Figures from the site managers interviewed at the telephone fieldwork stage indicated that there were 1167 workers across the 26 sites. Using this figure it would appear that around 29% of the potential workforce took part in the research, however it should be noted that there were instances where on the day the site was visited many fewer workers were present than indicated by the site manager when first contacted. This was due to number of factors, for example the site may have entered into another phase of the project by the time the interviewer was able to visit the site.

The proportion of workers interviewed varied greatly, at some sites we interviewed all workers present, on other sites particularly, where interviewing only occurred during short break times, only a small proportion of workers were interviewed.

1.5 Structure of the report

The report is structured as follows:

Chapter 1	Background, Objectives and Methodology
Chapter 2	Management Summary
Chapter 3	Profile, Work Status and Work Histories of the Construction Workforce
Chapter 4	Qualification and Skills
Chapter 5	Mobility

A separate technical report has been produced.

1.6 Notes on tables

Where respondents can give multiple responses to a question, the sum of the individual responses may be greater than 100 per cent.

Also the percentages in the tables do not always sum to 100 per cent due to rounding, and where percentages in the text differ to the sum of percentages in the tables, this too will be due to rounding.

An asterisk (*) in a table signifies a percentage that is greater than 0 but less than 0.5.

A dash (-) signifies a cell where data has not been included due to too small a base size.

N/A in a table signifies where we are unable to make a comparison with previous years as either the question wasn't asked or the data wasn't available.

With the exception of base totals the figures referred to are weighted.

The report contains some tables showing findings based on relatively small numbers of respondents (less than 70). Such low base sizes carry a greater risk of these figures being unrepresentative of the population in question and should, therefore, be treated as indicative only. Consistent with the 2004 report, only results based on 15 workers or more have been referenced in either tables or the text.

2 Management Summary

ConstructionSkills commissioned BMRB to undertake a survey of construction workers to provide reliable data on the nature of the workforce in the UK and the Republic of Ireland (ROI) with regard to their competence/qualification levels and the extent of occupational and geographic mobility within the workforce.

The survey results presented in this summary are based on fieldwork conducted in the North West from February to July 2007. This consisted of a total of 342 face-to-face interviews with construction workers obtained across 26 sites.

This summary highlights the key findings for each of the major themes covered. Where available, results from the 2007 survey have been compared with those from similar previous research conducted by IFF Research in 2004².

Detailed results are available in the body of the full report, and a full technical report is available containing full details of sampling and methodology.

2.1 The profile of the workforce

The profile of workers interviewed in the North West is broadly similar to the UK/ROI profile and to the regional profile in 2004 in terms of age, gender, ethnicity, work status and contractual terms.

Construction workers interviewed in the region were also broadly representative of the overall and the 2004 regional profile by occupation, with all occupations represented here. Although it is not possible to comment on individual trades, the four occupations accounting for the majority of the sample are consistent across the different samples.

The workforce is clearly mature, with almost three-quarters having been in the industry for five or more years, and new entrants (no more than one year's experience) making up around fifteen per cent. Over half began their working life in the industry, which is typical for the UK/ROI.

2.2 Qualifications and skills

In general, the North West appears to have a more qualified workforce than average, with the vast majority holding some formal qualification or working towards one. Specifically:

- three quarters hold a skill card or certificate, with the majority of these holding a CSCS/CSR certificate or card. This represents a significant increase since 2004 and compares well with the UK/ROI average. Workers aged between 25 and 44 are most likely to hold a skill card/certificate and those aged 16–19 far less

² Comparative findings should be treated as indicative only due to key differences in the types of sites visited in 2004 and 2007. The profile of sites visited showing differences by size and category are included in the technical report.

- three in five workers have other formal qualifications relevant to construction, again out performing the national average and better than in 2004. Most have an NVQ/SVQ and this highlights a switch towards NVQs/SVQs away from City and Guilds since the previous survey
- one in six workers is studying for a new, relevant qualification in line with the UK/ROI average
- almost ninety per cent of workers believe they have all the skills they require for their current job, although around a quarter of 16–19 year olds and slightly fewer 20–24 year olds say they need more training
- among the one in nine workers who have supervisory or managerial duties, half have received relevant training to improve their skill in this area, and the remainder have not – again a typical finding
- just one in seven people indicated at least one basic skills area, such as reading, writing, speaking English and maths they would like to address, and broadly, one in ten indicated a need for each of these
- among the one in eight workers who would like to change jobs within the industry, over eighty per cent identify a need for training and qualifications to equip them for this new role.

2.3 Mobility

One challenge to delivering training to site-based workers is the relatively short period of time that workers stay at one site. In the North West, just one in five workers expect to be on site for more than six months; lower than reported nationally and when compared to expectations in 2004.

The North West is, however, one of several geographic areas with a highly self-contained and somewhat static workforce. Three-quarters of its construction workers originate from the region and almost everyone interviewed said they had spent all or most of their construction career in the region. Just two per cent are in temporary accommodation and fewer than one in ten are working outside the area where they have a permanent address.

A large majority of workers aged under 60 say they will definitely, or are very likely, to be working in the industry in five years time compared to just five per cent who think it is unlikely. This presents a very stable picture for the industry within the region compared to the UK/ROI as a whole and it is a notable improvement on 2004 when just three-quarters were certain about continuing their employment.

3 Profile, Work Status and Work Histories of the Construction Workforce

In this chapter we look at the demographic details of the construction workers interviewed in terms of age, ethnicity and gender. We also look at the proportion working directly for a company, self-employed or for an agency, and the extent to which they are working on a permanent or temporary basis. The occupational profile of the sample and career histories are examined in terms of how many years they have worked in construction and the previous roles workers have had within the sector.

3.1 Demographic profile of the sample

The following table shows the demographic profile of our sample of construction workers in the North West and compares this to the profile in 2004 and the overall workforce interviewed in the survey.

Table 3.1 Demographic profile of the sample			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
<i>Age:</i> 16–19	7	21	8
20–24	16		16
25–34	23	29	25
35–44	27	24	25
45–54	15	17	16
55+	10	8	10
<i>Ethnicity:</i> White	99	99	96
Asian	<1	1	2
Black	<1		1
Other	-		1
<i>Gender:</i> Male	99	100	99
Female	1	-	<1
<i>Base: North West respondents (2007: 342; 2004: 68;); Overall workforce (3,877)</i>			

The age profile of construction workers in the North West reflects the national profile, with one in four (23%) workers aged under 25 and a similar proportion (25%) aged 45+. As has been noted in the overall UK/ROI report, the construction industry has a much younger profile than is seen in other industries and as such generalised concerns about an aging workforce and

the potential loss of skills do not apply as strongly here. There has been no significant change in the age profile of the region since 2004.

The workforce interviewed here was almost entirely male, with just two women taking part in the survey. This is not particularly notable given that just 16 women were interviewed overall, representing 0.4% of the UK/ROI sample.

One per cent (two people) of the sample was of black minority ethnic (BME) origin. This is in line with the UK/ROI profile (3% BME), and is suggestive that BME workers may be under-represented in the North West when compared with the proportion of the resident population aged 16–80 who are from BME groups. Data from the Labour Force survey (Spring 2007) indicates that 7% of adult North West residents are of BME origin.

3.2 Work status

Eighty-five per cent of respondents in the region said they were employed on a permanent basis compared with just one in eight (13%) on a temporary basis.

Over three-quarters (78%) were employed directly by a company, with a fifth (19%) self-employed and three per cent (11 people) working for an agency. This differs from the overall UK/ROI profile, which shows more people as self-employed (+10%) and fewer who are employed directly (-14%). The proportion of workers interviewed who are employed directly also increased (+12%) since 2004 with concomitant decreases among the self-employed (-6%) and agency workers (-5%).

Table 3.2 Work status							
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %	Years working in construction			
				<1 year %	1–2 %	3–4 %	5+ %
Employed by a company	78	66	64	76	89	67	79
Self-employed	19	25	29	11	6	31	20
Work for an agency	3	8	5	14	6	3	2
Unemployed	-	N/A	1	-	-	-	-

Base: North West respondents (2007: 342; 2004: 686); Overall workforce (3,877)

At the national level, there continues to be a notable effect on the level of self-employment by how long people have worked in the industry. Whether the same is true in the North West cannot be ascertained with any certainty given the small base sizes, although a similar pattern appears to be in evidence in Table 3.2. Almost one in three (31%) workers who have been in the industry 3–4 years are self-employed.

Base sizes are too small to provide reliable comparisons between most of the individual occupations. Data is provided below for those occupations where there are 15 or more

respondents, but it should be noted that there are no significant differences between any of these and the UK/ROI average:

- All self-employed respondents 19%
- Bricklayers 27%
- Carpenters/Joiners 23%
- Pipe fitters 25%
- Plant/Machine Operatives 18%
- Steel Erectors/Riggers 17%
- Labourers 16%
- Plumbers 13%.

3.3 Occupational profile

Results showing how workers classified their current role or occupation are shown in Table 3.3 below. This lists those occupations mentioned by 1% or more of the North West sample in 2007. Comparative data is also provided for the UK/ROI total in 2007 and for the region in 2004.

Table 3.3 Occupational Profile			
	North West 2007 % (No.)	North West 2004 % (No.)	Overall Workforce (UK/ROI) 2007 % (No.)
Labourer/General Operative	17 (58)	13 (90)	17 (674)
Carpenter/Joiner	15 (53)	13 (89)	14 (559)
Bricklayer	15 (52)	8 (53)	13 (536)
Plant/Machine Operative	11 (39)	4 (29)	13 (502)
Steel Erector/Rigger	7 (23)	6 (41)	2 (75)
Pipe Fitter	6 (20)	8 (54)	3 (102)
Plumber	4 (15)	N/A	5 (183)
Banksman/Banksperson	3 (11)	N/A	2 (81)
Scaffolder	3 (11)	7 (46)	3 (112)
Supervisor	3 (11)	N/A	5 (192)
Electrician	3 (10)	7 (46)	7 (247)
Plasterer/Dry-liner	3 (10)	3 (24)	5 (190)
Roofer	2 (8)	N/A	4 (133)
Civil Engineering Operatives	2 (6)	N/A	2 (75)
Manager	1 (4)	N/A	3 (111)
Floorer	1 (3)	N/A	N/A
Glazier	1 (3)	N/A	N/A
Painter/Decorator	1 (3)	N/A	2 (97)
Fitter (all others)	1 (2)	N/A	N/A

Base: North West respondents (2007: 342; 2004: 686); Overall workforce (3,877)

The profile of workers interviewed in the North West is broadly similar to the overall profile, with all occupations represented (if only by one person in some cases). Although it is not possible to comment on individual trades in detail, the four occupations accounting for the majority of the sample (bricklayers, carpenters, labourers and plant/machine operatives) are

consistent. The 2007 sample comprises a slightly broader representation of trades than in 2004.

3.4 Years working in construction

The majority (72%) of construction workers in the region have been in the industry for five or more years, with over a quarter (29%) having more than 20 years experience. New entrants, with no more than one year's experience, make up eleven per cent of the workforce, as in the overall sample.

There is insufficient data to highlight differences in length of service by occupation type.

Table 3.4 below summarises the workforce profile based on the amount of cumulative time spent in the industry, showing the North West as very much in line with the UK/ROI profile.

Table 3.4 Years spent working in construction (cumulative)		
	North West 2007 %	Overall Workforce (UK/ROI) 2007 %
Less than 6 months	4	5
A year or less	11	11
2 years or less	16	17
5 years or less	30	33
10 years or less	43	50
20 years or less	70	71
More than 20 years	29	27
<i>Base: North West respondents (342); Overall workforce (3,877)</i>		

3.4.1 Construction employment

Over half the construction workers in the North West began their working life in the industry, which is typical for the UK/ROI (58% vs. 62% respectively). Certain trades are more likely to attract entrants to the industry immediately after leaving education; amongst this sample the majority of bricklayers (87%), plumbers (73%) and carpenters (67%) began their working lives in construction.

Here, as across the UK and ROI, two in five (39%) workers came into the industry after starting work in another field. As is seen elsewhere, this figure is highest for labourers and plant machine operatives (52% and 54% respectively).

The 132 respondents whose first job was *not* in construction were asked what their previous job had been. Not surprisingly, a diverse range of occupations was mentioned, and although this list is too broad to include here, there is, generally speaking, a degree of consistency between the types of jobs undertaken previously and the subsequent move to construction.

Since starting their first job in construction, almost all (91%) of those who have had more than one job say they have worked in construction 'pretty much continuously'. Of the rest, just two per cent have worked exclusively in construction, but had spells of being out of work, while five per cent has dipped in and out, doing other jobs at different times.

Table 3.5 Pattern of working in construction (cumulative)			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
Continuously	91	88	79
Exclusively within construction but with spells out of work	2	3	6
Others sorts of jobs	5	9	13
<i>Base: North West respondents who have had more than one job in construction 2007 (295); 2004 (unknown); Overall workforce (3,877)</i>			

This is somewhat different to the overall picture for the UK/ROI, with the North West providing significantly more continuous employment than is seen elsewhere.

3.4.2 Occupational switching and progression

An area of particular interest in the research was the extent of switching between occupations within construction. To this end workers were asked if they had always worked in their current role/occupation and if not, what their previous occupation had been.

In the North West, three in five (61%) workers said they had always had the same trade during their time in the construction industry. This is the same as across the UK/ROI and broadly in line with 2004 (60% and 67% respectively).

Detailed analysis by individual occupations is limited due to small bases for many. However, it is notable that labourers/operatives (63%) are *no* more likely than average to have come to their current position via other roles, which contrasts with the broader findings.

4 Qualifications and Skills

A key objective of this research was to measure the competence/qualification levels of the construction workforce. A number of questions were asked to ascertain this:

- whether any construction skill certificate or card was held and if so which and, in the case of CSCS and CSR cards, to what level
- what formal qualifications relevant to the construction industry they held or were working towards, if any
- those with managerial or supervisory duties were asked about any training specifically designed to improve their managerial or supervisory skills or knowledge.

We also asked workers to assess their own skills, including basic skills and whether they felt they needed more training to do their current job.

4.1 Construction skill cards and certificates

There is a general move in the industry for all persons working on, or visiting construction sites to have a construction skill card or certificate. Already, many sites won't let workers on without an appropriate card to prove their skills. And this is set to increase as the industry-wide deadline approaches for a fully qualified workforce by 2010.

Overall, three quarters (75%) of workers said they hold a skill card or certificate of some description. This has increased since 2004 (66%), and importantly, is significantly higher than UK/ROI average (68%). Nevertheless, other regions perform better, with workers in Northern Ireland (84%), East of England (81%) and the West Midlands (79%) more likely to be in possession of a card or certificate.

Encouragingly, at least 60% of the workforce in each occupational group holds a skills card/certificate. Again base sizes are too small to provide reliable comparisons between most of the individual occupations, but data is provided below for those occupations where there are 15 or more respondents.

- All respondents holding a skills card/certificate 75%
- Steel Erectors/Riggers 100%
- Pipe Fitters 85%
- Plant/Machine Operatives 79%
- Carpenters/Joiners 77%
- Plumbers 67%
- Bricklayers 62%
- Labourers 60%.

Steel erectors/riggers and plant/machine operatives were similarly highlighted for high penetration of skills cards, and labourers and bricklayers for low penetration in the overall UK/ROI findings and in 2004.

Table 4.1 shows how possession of a skill card or certificate varies by key demographic variables:

Table 4.1 Whether have a skill card/certificate by other variables			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	75	66	68
<1 year in construction	65	16	39
1–2 years	61	62	60
3–4 years	69	N/A	65
5+ years	78	N/A	75
16–19	30	N/A	43
20–24	75	N/A	62
25–44	81	73	73
45+	77	64	72
Employed directly	77	71	70
Self-employed	68	61	69
Agency worker	-	49	62
<i>Base: North West respondents (2007: 342; 2004: 686) Overall workforce (3,877)</i>			

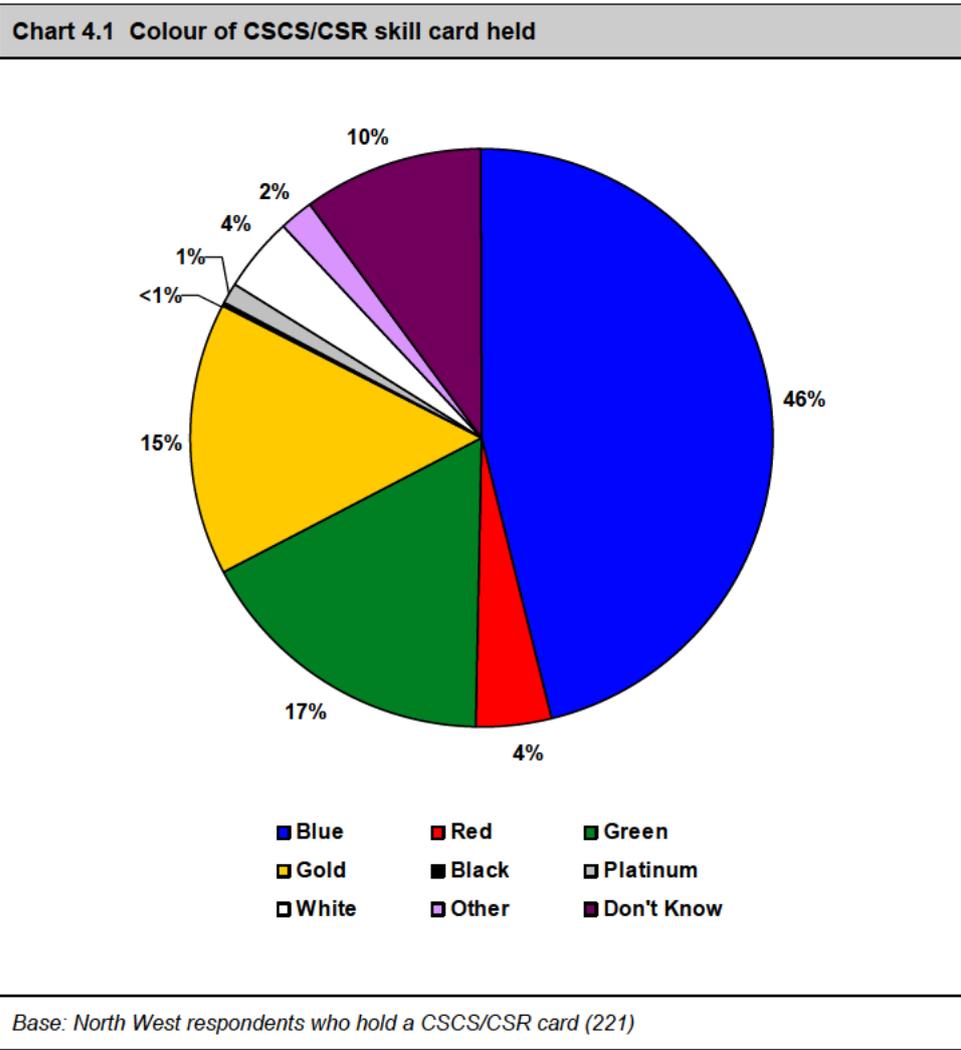
Young workers, aged 16–19 are far less likely to have a skills card than their older colleagues (aged 20+) (30% vs. 79%), while those aged between 25 and 44 are most likely to hold one (81%). Unlike in other areas where the least experienced (<1 year in construction) group is less likely to hold a card or certificate, in the North West there is no clear relationship between length of time spent in the industry and likelihood of holding a card.

Looking at the regional workforce as a whole, i.e. including those who do not hold any certificate or card, two-thirds (65%) hold a CSCS/ CSR certificate or card, representing a significant increase (+10%) since 2004. This figure also compares well with the UK/ROI overall (55%) although other regions perform slightly better; Northern Ireland (79%), Wales (71%), East of England (70%).

The 221 workers who said they have a CSCS/CSR card were also asked its colour level, and the top four (10 or more responses) were as follows:

- 46% Blue – skilled NVQ/SVQ Level 2 or industry accreditation grade A
- 17% Green – construction site operative card for general site workers
- 15% Gold – craft/supervisor card NVQ/SVQ Level 3 or industry accreditation grade B
- 4% Red – trainee registered for an NVQ/SVQ.

Chart 4.1 shows the proportions of card-holders with each colour of card.



A further sixth have either a CPCS (Construction Plant Competence Scheme) (13%) or a CTA (Certificate of Training Achievement) (3%), with the remainder in possession of a variety of trade-specific or other certificates. Just one in four (25%) workers does not have any card.

4.2 Construction qualifications held

Workers were also asked what other formal qualifications relevant to construction they held (excluding first aid certificates). As a relatively high proportion (6% in North West; 8% overall) did not give an answer to this question, results in this section are based on those who gave an answer. In the North West, three in five (59%) workers (who gave a response) have such a qualification. This is significantly more than across the UK/ROI (48%).

There is a notable increase in the proportion of qualified workers as they become more experienced, doubling from a third of those working 1–2 years, to two-thirds among those working for five or more years (33% to 66% respectively). By contrast, it is not clear from the data whether age impacts on qualifications despite this relationship being evident at the overall UK/ROI level. However, the data does show that self-employed workers in the North West were more likely to hold a qualification than those who are employed directly (70% vs. 57% respectively).

Table 4.2 Hold any construction specific qualification			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	59	51	48
<1 year in construction	21	16	15
1–2 years	33	27	30
3–4 years	56	N/A	39
5+ years	66	N/A	57
16–19	32	N/A	30
20–24	48	N/A	40
25–44	65	50	54
45+	58	64	50
Employed directly	57	51	48
Self-employed	70	53	54
Agency worker	-	53	30
<i>Base: North West respondents who gave a response 2007 (322); All North West respondents 2004 (686); All UK/ROI respondents who gave response (3,594)</i>			

Again, small bases preclude detailed analysis by occupation, but data is provided below for those occupations where there are 15 or more respondents.

- All respondents who hold a construction specific qualification 59%
- Bricklayers 81%
- Steel Erectors/Riggers 76%
- Carpenters/Joiners 72%
- Pipe Fitters 60%
- Plant/Machine Operatives 44%
- Labourers 22%.

Workers who said they had a construction qualification were asked what type of qualification they held. Where more than one response was given the highest qualification was recorded.

Table 4.3 Main type of highest qualification held			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
NVQ/SVQ	60	25	51
City and Guilds	32	49	34
Construction Award	3	4	2
HNC/HND/BTEC higher	2	2	1
Apprenticeship	-	5	4
Degree	-	N/A	1
<i>Base: North West respondents with qualification (2007: 189, 2004: 352); All UK/ROI respondents who gave response (1,810)</i>			

In the North West, three in five workers with a qualification have a NVQ/SVQ, which is higher than the UK/ROI average (60% vs. 51% overall). The proportion with a City and Guilds is more typical, with a third (32%) holding this type of qualification. As seen across the UK/ROI, there has been a significant switch towards NVQs/SVQs away from City and Guilds, with twice as many people holding City and Guilds than NVQs/SVQs when the survey was conducted in 2004 (49% vs. 25% respectively).

The majority (77%) of those with a formal construction qualification attained it whilst living in the North West region. Most of the remainder qualified in the West Midlands (14%), Yorkshire and Humber (3%) and Wales (3%).

4.3 Working towards construction qualifications

One in six (17%) construction workers in the North West, as across the UK/ROI, said they are currently working towards a qualification that is specific to the construction industry. This is higher than reported for the region in 2004 (11%).

Table 4.4 Working towards a construction specific qualification			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	17	11	17
<1 year in construction	43	27	28
1–2 years	44	38	32
3–4 years	31	N/A	36
5+ years	9	N/A	11
16–19	61	N/A	47
20–24	31		27
25+	10	7	12

Base: North West respondents (2007: 342; 2004: 686); Overall workforce 2007 (3,877)

As we see elsewhere, workers in the industry for five years or less are more likely to be working towards a qualification than their longer serving colleagues. Specifically, just 9% of those who have been working for five or more years are working towards a relevant qualification compared to almost half of those in the industry for two or less years. A similar pattern is evident by age, with twice as many 16–19 year olds studying as those aged 20–24 (61% vs. 31%), and falling to just ten per cent amongst those aged 25+. These findings are typical of the situation across the UK/ROI and suggest increased take-up of training across recent recruits since 2004.

Two-thirds (64%) of people who are studying for a qualification (Base 58) are working towards an NVQ/SVQ. Just three per cent (two people) are aiming for Construction Awards and no one mentioned City and Guilds or an apprenticeship. Interestingly, 14% (eight people) said they don't know which qualification they are studying for.

4.4 Managerial qualifications

A further area of investigation in relation to training and qualifications was to look at the extent to which workers with managerial or supervisory duties have had training specifically designed to improve their skills in this area.

Just one in nine (11%) workers said they had supervisory or managerial duties on site at the time of the survey – 39 people in all. All but two of these had spent at least five years in the industry, and less than half described themselves as either managers or supervisors.

Half of these people (49%) said they had not received any relevant training to improve their skill in this area. This is the same proportion as seen across the UK/ROI and compares to two-thirds (66%) in 2004. Amongst the other half who have received some training, most accessed in-house training (33%), and one in five (21%) have had 'Chargehand and Team Leader' training. Others have accessed a range of accredited, industry recognised programmes. The types of training undertaken by at least one respondent are shown in Table 4.5. Percentages and base sizes (in brackets) are shown for 2007.

Table 4.5 Type of training received to improve management or supervisory skills			
	North West 2007 % (No.)	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
None/can't remember	49 (19)	66	47
In-house training	33 (13)	23	31
Chargehand and Team Leader Training	21 (8)	1	10
Civil engineering Site Managers Scheme	5 (2)	N/A	3
Assessor and Verifier Training	5 (2)	1	5
Site Safety Supervisors Course (for CSR)	5 (2)	N/A	7
Supervisory Management Training and Development	5 (2)	3	2
CIOB Site Management Education and Training Scheme (SMETS)	3 (1)	N/A	2
SMSTS (Site Manager Safety Training Scheme)	3 (1)	1	8
CITB Training	3 (1)	N/A	3

Base: All with management and supervisory duties North West (2007: 39, 2004: 142); All UK/ROI respondents who gave response (678)

4.5 Summary of qualification and skills card status

Table 4.6 summarises the extent to which the workforce has attained and/or is working towards relevant qualifications and skill cards/certificates. The results for the North West are compared with the regional results in 2004 and the overall results in 2007.

Table 4.6 Qualification status			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
Hold a formal construction qualification or a skills card/certificate or working towards a qualification	90	85	82
Hold a formal construction qualification or a skills card/certificate	86	82	78
Hold a skills card/certificate	75	66	68
Hold a skills card/certificate but no other construction qualification	31	30	33
Working towards a qualification	17	11	17
<i>Base: North West respondents (2007: 342; 2004: 686); All respondents (3,877)</i>			

Regionally the results are encouraging, in that the vast majority of the workforce holds a skill card/certificate or some formal qualification or is working towards one and findings are generally more positive than noted across the UK/ROI (90% and 82% respectively). The level of attainment is broadly similar to that achieved in 2004, although as noted previously, there has been an increase in the proportion holding a skills card or certificate.

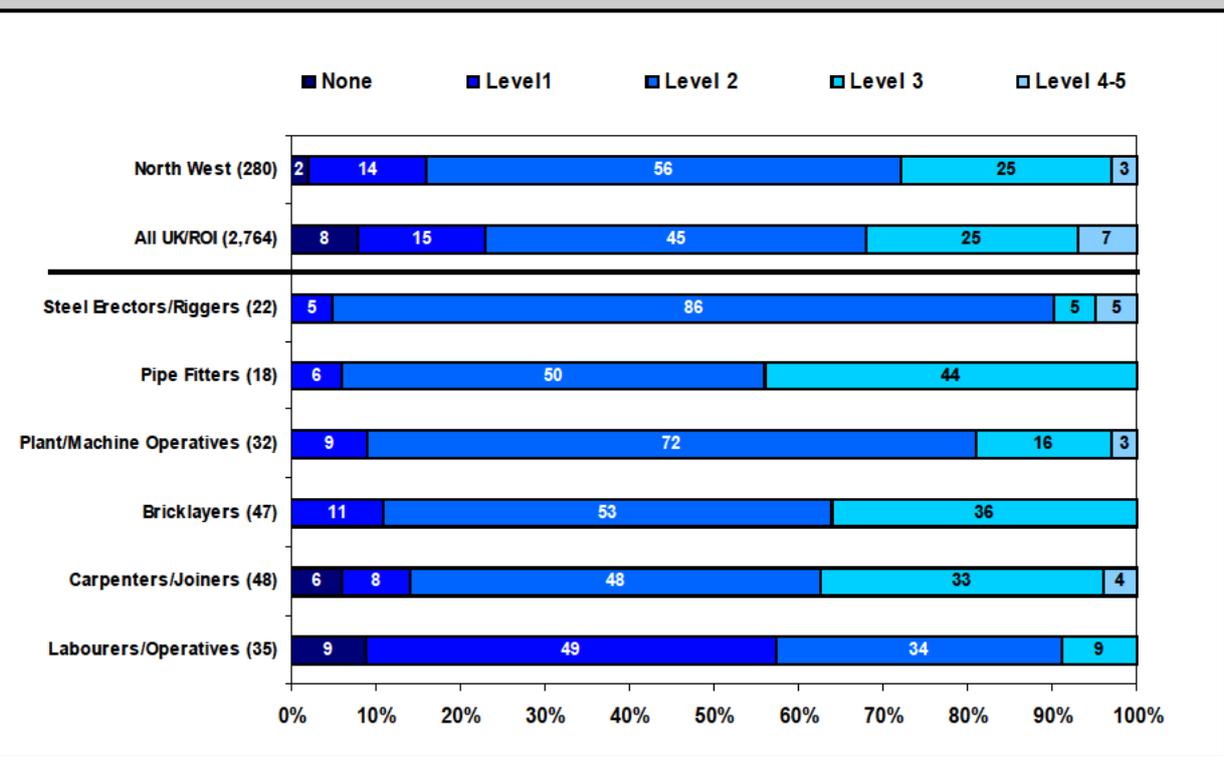
4.6 Competence/qualification level of the construction workforce

Using the responses given by workers for qualifications and skill cards/certificates held and managerial training undertaken, the highest competence/qualification level achieved has been derived for each worker and presented in Chart 4.1 for groups where there are more than 15 respondents. The technical report shows the definitions of each level, which are largely the same as those used in the 2004 survey³.

Chart 4.2 shows the results overall, and by occupation where base size allows.

³ In 2004 Green CSCS and CSR cards were categorised as Level 2, in 2007 they were categorised as Level 1.

Chart 4.2 Competence/qualification level by occupation



Base: All respondents where a competence/qualification level could be calculated (237)

Just two per cent of construction workers in the North West have no qualification, management training or skill card/certificate, which is a significant improvement on 2004 when one in five (18%) workers had no such qualification, and compares well with the overall picture for the UK/ROI where 8% have no competence/qualification level. Two-thirds (69%) are qualified to level 1–2, with just over quarter (28%) attaining Level 3 or higher.

Within occupation, labourers/operatives were particularly likely to have only reached level 1, with half (49%) achieving this competence/qualification level. Plant/machine operatives were particularly likely to have achieved a level 2 qualification, with 72% falling into this category.

4.7 Self assessment of skill level

Workers' own perceptions as to whether they have all the skills they need to do their current job were ascertained after they were asked about the various qualifications they held or were working towards. Table 4.7 summarises the results.

Table 4.7 Self assessment of skill level and training needs for current job			
	North West 2007 %	No skill card/ qualification/ nor working towards any 2007 %	Overall Workforce (UK/ROI) 2007 %
Have all the skills needed for current job	87	90	76
Need more training or qualifications	8	4	13
Need more experience	5	5	8
Don't know	1	1	3
<i>Base: North West respondents (342); No qualification nor working towards any (34); Overall workforce (3,877)</i>			

The vast majority (87%) of workers believe they have all the skills they require for their current job. Interestingly, there is no notable difference of opinion amongst those with no skill card or qualification and who are not currently working towards one which has been noted at the overall UK/ROI level.

Just eight per cent of workers interviewed identified a personal need for more training or qualifications, and five per cent believes they simply need more experience. As would be expected, the youngest age groups are most likely to believe they need more training and qualifications, with over half those aged 16–19 saying they need more training and qualifications or more experience (26% and 30% respectively). Amongst the 20–24 year old age group almost a third requested more training and qualifications or more experience (both 15%). By contrast there is virtually no demand amongst workers aged 45+ (3%, two people).

All respondents were also asked whether they felt that training in basic skills, such as reading, writing, speaking English and maths, would help them with their work. One in seven (15%) indicated at least one basic skills area they would like to address, and broadly, one in ten people indicated each of these areas as shown in the first column of the table.

Table 4.8 Need for training in basic skills			
	North West 2007 %	All identifying a need 2007 %	Overall Workforce (UK/ROI) 2007 %
Any need identified	15	100	21
Reading	11	71	12
Maths	11	69	10
Speaking English	9	62	12
Writing	8	56	10

*Base: North West respondents (342); No qualification nor working towards any (52); Overall workforce (3,877)
NB: A comparison is not provided for the regional 2004 data due to a significant change to the question wording this year.*

Demand for this type of basic skills training is lower in the region than across the UK/ROI (15% vs. 21% overall) and it is particularly notable that demand remains consistently low across the different age groups; 16–19 (17%); 20–24 (20%); 25–44 (17%) and 45+ (7%).

Another source of employee driven demand for training could potentially come from those wishing to change occupation within the sector. In the North West, as nationally, around one in eight (12%) workers said they would like to change the kind of work they do, whilst remaining in the construction industry.

There is insufficient data to draw conclusions about the type of worker wanting to change jobs, but three in ten of those who would change (Base = 42) would like to switch to a managerial or supervisory role (29%). Of the remainder, all the preferred roles identified are skilled occupations. Consequently, the majority (81%) identify a need for further training and qualifications to equip them for this new role, which represents approximately 10% of the total North West workforce.

The top reasons given for wanting to change occupation (at least five respondents) are as follows:

- Better pay – 52%
- More interesting work – 36%
- Need a change/Bored – 12%
- Less physical – 12%.

One challenge to delivering training to site-based workers is the relatively short period of time that workers stay at one site, as well as the uncertainty that exists around how long the work will last. The following table indicates how much time workers in the North West expect to spend at their current site and how this compares with the national picture.

Table 4.9 Total length of time expect to work at site		
	North West 2007 %	Overall Workforce (UK/ROI) 2007 %
<1 month	7	11
1–3 months	25	20
>3 up to 6 months	31	16
>6 months up to a year	18	17
More than a year	4	20
Don't know	15	17
<i>Base: North West respondents (342); Overall workforce (3,877)</i>		

In the North West, just one in five (22%) workers expect to be on site for more than six months; lower than reported nationally and when compared to expectations in 2004 (37% and 31% respectively). Workers now seem to be more informed about their commitment, with just 15% saying they don't know how much longer they will be on site, compared with a quarter (23%) in 2004.

5 Mobility

A key aim of the survey is to gain an understanding of geographic mobility of construction workers and to try to get a measure of which regions are net 'importers' and which are net 'exporters'. Another aim is to identify which types of workers (for example, by occupation and competence/qualification level) are particularly likely to be mobile. The results from this analysis clearly have a bearing on training planning, provision and investment.

What constitutes a mobile worker is not straightforward. Potentially it includes those who live outside a region and travel in on a daily basis, those who live in temporary accommodation while working but whose permanent address is outside the region, those who have moved to the area on a semi-permanent basis, as well as those who received their construction training elsewhere but have now moved to the region on a permanent basis. Hence for the survey a number of questions were asked covering these issues. These were:

- where respondents were from originally
- whether they travel from their permanent address or a temporary address (and if temporary why they work in the current region)
- the proportion of their time working in construction which has been on sites within the region where they are currently working
- the miles they travel to get to the site each day
- whether when they finish this site they expect to get a job which allows them to commute on a daily basis from their permanent address.

These areas are discussed in turn. In the last section we also look at how long workers are typically based at an individual site to give some idea of the frequency of moving between sites. Clearly workers may have spent their whole working life in one region and therefore appear relatively immobile, but if they move site frequently, providing training to these workers could be problematic.

5.1 Worker origin

Workers were asked where they were from originally. As a measure of mobility clearly this is very broad, since people may have moved to a region on a permanent basis and done so many years ago for reasons other than their work. That said there are still some interesting differences between regions as far as importing and exporting workers is concerned which are shown in table 5.1.

Where from originally	Where currently working												
	NI %	NE %	Scot %	Wales %	NW %	Y&H %	WM %	ROI %	EM %	SW %	EE %	SE %	Lon %
Northern Ireland	92	*	-	2	1	-	*	*	1	*	1	1	1
North East	*	84	4	1	*	5	2	*	1	1	1	1	1
Scotland	1	1	84	*	*	1	1	*	1	1	-	*	1
Wales	-	*	-	79	3	1	1	-	2	5	*	2	1
North West	*	1	4	2	74	5	2	-	2	8	1	1	1
Yorkshire and Humber	*	4	2	-	4	74	2	1	9	3	1	1	1
West Midlands	*	-	1	1	11	-	70	-	7	7	1	3	*
Republic of Ireland	2	*	-	1	1	2	5	67	2	2	5	5	5
East Midlands	*	*	*	1	1	6	7	-	65	4	2	2	1
South West	-	1	-	7	-	*	3	-	1	60	2	4	*
East of England	1	4	-	-	*	3	1	*	2	2	57	7	9
South East	-	1	-	1	*	1	1	*	2	8	6	49	15
London	-	*	1	1	*	*	1	*	1	3	13	12	33
Outside UK and ROI	2	1	2	4	-	1	3	29	2	1	8	8	22

Base: All Respondents (3,877)
NB: Dark shading denotes proportion of workers in region originally from that nation/region. North West workers are also shaded (light).

The North West is one of several geographic areas with a highly self-contained workforce – as shown in the chart, three quarters (74%) of its construction workers originate from the region, with inward migration coming mainly from the West Midlands (11%), but also from Yorkshire and Humber (4%) and Wales (3%). Nevertheless, other regions are more self-contained; namely Northern Ireland, the North East, Scotland and Wales. By contrast, London and the South East are notable as the largest ‘net importers’ of construction workers according to this measure.

Almost all (94%) construction workers interviewed in the region said they had lived in the UK/ROI all their life, which is significantly higher than the average (85%). Fewer than ten people who were interviewed came from countries outside the UK/ROI.

5.2 Location of workplace, current and permanent residence

All respondents were asked where they were living to get to their current place of work, whether this was their permanent address and, if not, where their permanent address was. Table 5.2 presents results for *all* regions showing:

- the percentage of workers whose **permanent** residence is in the same nation/region as their current work
- the percentage of workers currently living in the same nation/region as their current work.

In each instance the corresponding percentages resident in different regions are shown to the left and the percentages resident in neighbouring regions to the right. The results from the 2004 survey are also included for comparison.

Table 5.2 Region of establishment/permanent residence and work residence												
Region of establishment	Region of permanent residence						Region of current residence					
	% from different nation/region		% from same nation/region		% from neighbouring nation/regions		% from different nation/region		% from same nation/region		% from neighbouring nation/regions	
	2007	2004	2007	2004	2007	2004	2007	2004	2007	2004	2007	2004
Northern Ireland	1	0.5	99	99.5	-	-	0.5	0.5	99.5	99.5	-	-
Scotland	8	2	92	98	4	1	1	1	99	99	-	1
North East	9	5	91	95	6	4	8	4	92	96	5	3
West Midlands	13	11	87	89	10	10	7	10	93	90	7	9
Wales	13	10	87	90	7	5	12	8	88	92	7	4
Yorkshire and Humber	16	12	84	88	15	10	12	8	88	92	11	8
East of England	20	32	80	68	17	27	18	30	82	70	15	28
North West	12	19	82	81	15	17	18	13	82	87	15	12
South West	22	13	78	87	13	8	17	8	83	92	11	5
East Midlands	23	25	77	75	20	18	22	20	78	80	20	16
London	32	43	68	57	30	25	30	29	70	71	30	26
South East	32	27	68	73	24	23	31	21	69	79	25	21

Base: All respondents (2007: 3,877; 2004: 8,436)

The North West draws the majority (82%) of its workforce from workers permanently resident in the region, with the remainder coming largely from neighbouring regions. This is the same as in 2004.

Table 5.3 shows the percentage of construction workers working outside the nation/region where they have a permanent residence.

Table 5.3 Percentage working outside their nation/region of permanent or current residence		
Region of permanent address	Permanent 2007 %	Permanent 2004 %
West Midlands	31	27
London	30	35
East Midlands	28	43
East of England	28	29
South East	20	12
Yorkshire and the Humber	18	22
North East	16	21
Wales	16	18
South West	15	27
North West	9	15
Northern Ireland	4	2
Scotland	1	8
All	18	21
<i>Base: All respondents (2007: 3,877; 2004: 8,436)</i>		

In this region, as highlighted in the table, almost just one in eleven (9%) of those with a permanent address in the region are working on sites outside the region. This is half the average amount for UK/ROI average and the 2004 regional figure.

5.3 Temporary accommodation

While clearly not everyone based in temporary accommodation will necessarily be 'imported' workers (some may also have a permanent address within the nation/region), this group is a proxy for the highly mobile workforce and as such constitutes another measure of mobility.

In the North West, just two per cent of workers were based at a temporary address and this applies equally to workers employed on a temporary or a permanent basis. No firm conclusions can be drawn on the basis of length of time spent in the industry, age or occupation given small base sizes.

5.4 Proportion of career spent in current location

Workers were asked what proportion of the time they had worked in construction in the UK/ROI had been spent on sites in the nation/region where they were currently working.

Table 5.4 Proportion of construction career spent in current nation/region			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
All of it	34	27	43
Most of it	48	45	33
Around half	9	11	9
Small proportion	5	15	8
Only this job	2	N/A	3
Don't know	2	N/A	3

Base: North West respondents (2007: 342; 2004: 686); Overall workforce (3,877)

Four in five (82%) workers in the North West said they had spent all or most of their construction career in the region, with just one in six (16%) indicating a higher degree of mobility. This indicates a more static workforce in the region than was evident in 2004 (72%) and when compared with the UK/ROI overall (76%).

5.5 Travel to work distances

The average number of miles travelled to work (each way) by workers in the region at the time of the survey was 24.5 miles (the same as in 2004) and in line with the national average of 24 miles. The median distance is 19 miles (across the UK/ROI median is 17 miles).

One in five (20%) workers reported travelling less than five miles, and almost two-thirds (62%) travelled less than 25 miles. One in twelve (8%) workers said they were travelling over 50 miles each way to work, which compares with 10% nationally.

5.6 Sub-sector mobility

All respondents were asked whether they had spent significant parts of their construction career on any of the following types of project: new housing; housing repair and maintenance; commercial work such as shops, offices, pubs etc.; private industrial such as warehousing, land reclamation etc.; public non-housing such as schools, landscaping etc. and infrastructure such as road, tunnel etc. Results are summarised in table 5.5⁴.

⁴ Results are not directly comparable with 2004 on this measure as a different number and definition of types of projects was used in 2004.

Table 5.5 Type of projects spent significant periods of construction career on		
	North West 2007 %	Overall Workforce (UK/ROI) 2007 %
New housing	73	73
Public non-housing	60	44
Commercial work	48	43
Private industrial	41	33
Housing repair and maintenance	32	38
Infrastructure	22	21
One type of project only	30	34
Two types of project only	19	19
Three types of project only	17	15
Four types of project only	13	12
Five types of project only	12	11
Worked on all six types of project	7	6
<i>Base: North West respondents (2007: 342; 2004: 686); Overall workforce (3,877)</i>		

The breakdown of project types is very much in line with the UK/ROI profile, with broadly one in three workers engaged on just one project type (30%).

New housing is the dominant sub sector (73%) and accounts for over two-thirds (69%) of the projects undertaken by those people who have only worked in one sub-sector. The remaining distribution of projects worked on in isolation are, private industrial (13%), public non-housing (12%), private commercial (4%) and infrastructure (1%).

Results vary by age and length of time in the industry as we have seen elsewhere in this report. For example, while two-thirds (65%) of 16–19 year olds have worked on just one type of project, this falls to less than a third (30%) of those aged 20–44, and to just 17% among those aged 45+ who have worked on broader range of projects.

Small base sizes preclude detailed analysis by individual occupations.

5.7 Leaving the industry

A final measure of mobility is the anticipated outflow from the workforce, i.e. those leaving the industry. The results for workers aged below 60 are shown in table 5.6.

Table 5.6 Likelihood of working in construction in five years time			
	North West 2007 %	North West 2004 %	Overall Workforce (UK/ROI) 2007 %
Definitely will	52	39	44
Very likely	33	36	32
Quite likely	8	11	10
Quite unlikely	2	3	2
Very unlikely	2	3	2
Definitely will not	1	3	2
Hope to be retired	1	N/A	2
Don't know	2	5	6

Base: North West workers aged under 60 (2007: 327; 2004: 670); All respondents aged under 60 (3,686)

Just five per cent of workers aged under 60 think it is unlikely they will be working in the industry in five years time. This is far outweighed by the majority (85%) who say they will definitely, or are very likely to, stay in construction, presenting a very stable picture for the industry within the region. These results are an improvement on 2004 when just three-quarters were certain about staying, and are also more positive than seen across the UK/ROI as a whole (75% and 76% say they are very likely to stay, respectively).

No further conclusions can be drawn in relation to individual sub-groups.