

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

North West Report - April 2019





Study prepared by BMG Research from a commission by CITB.

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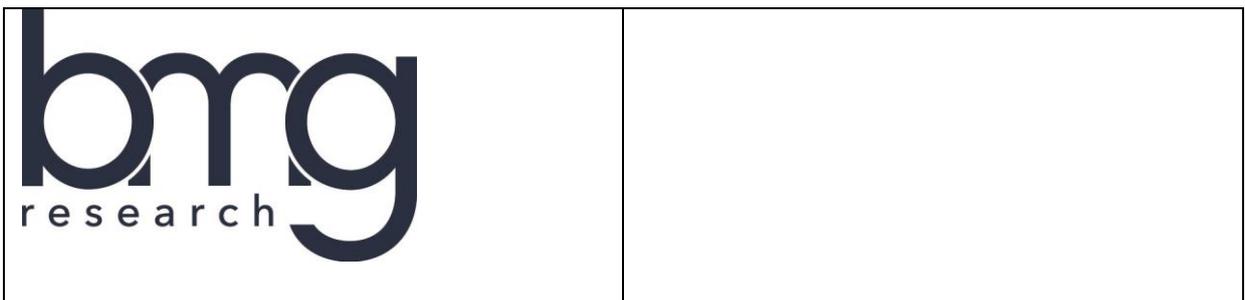




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Executive summary

Introduction

- CITB commissioned BMG Research to undertake the 2018/19 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 4048 construction workers undertaking manual roles on sites across the UK and 282 interviews were conducted with construction workers in the North West region.

Profile of the sample

- All but 2% of construction workers are male. Nearly half the construction workers interviewed in the North West are aged under 35 (48%), which is a higher proportion than the UK population as a whole (36%), and the UK average in the survey (45%). Just 3% of construction workers are aged 60 or over.
- Overall, 3% of the North West construction workforce is of BME ethnic origin, compared with a higher incidence of 12% in the North West population as a whole. The UK average in the survey is 6% (compared with 15% of the UK population as a whole).
- By trade/occupation, the highest proportion of the North West sample is accounted for by labourers/general operatives (18%), followed by site managers (17%), carpenters/joiners (11%) and bricklayers (10%). This is similar to the UK sample but there are fewer site managers in the UK sample (11%)
- Over a third of those interviewed in the North West perform a supervisory or management role on their site (37%); a higher proportion than in 2015 (25%) and compared to the UK average in 2018/19 (30%).
- More than half of construction workers interviewed for the survey in the North West are employed directly by a company (56%), which is a higher proportion than the UK average (of 49%). Two-fifths of workers in the North West are self-employed (39%) and this is a lower proportion than the UK average (of 43%). Since 2015 the proportion that are directly employed and the proportion that are self-employed have remained about the same (57% & 40% in 2015). Just 4% of construction workers in the North West work for an agency, which compares with 7% nationally and 4% within the North West in 2015.
- The likelihood of being directly employed decreases with time spent working in construction, from 87% of those that have worked in construction for less than a year to 52% of those that have been working in the industry for 5+ years.
- One in ten of all construction workers in the North West (10%) are employed on a temporary, rather than permanent basis. This is a lower proportion than the UK average (28%). By occupation the proportion is highest amongst carpenters/joiners (both 19%) and lowest amongst site managers (6%) and Plant/machine operatives (4%).



- Similarly, to the UK average, more than half of construction workers in the North West work between 40 and 49 hours per week (54%, compared with a UK average of 60%), and around a fifth (22%) works more than 50 hours per week, which is similar to the UK average (23%).

Work history

Time in the sector

- A third of all North West construction workers have worked in the industry for at least 20 years (33%), which compares with a lower UK average (32%). Around three-fifths have done so for 10+ years (60%).
- Three-fifths of construction workers in the North West have only ever worked within the construction industry (61%), a decrease on 2015 (78%), and lower than the UK average in 2018/19 (67%). Around half of North West construction workers (49%) have worked pretty much continuously, without spells out of work, and this is a smaller proportion to that across the UK (56%).

Previous non-construction jobs

- Amongst the 1 in 4 construction workers in the North West that worked in another sector before starting work in construction (25% of all respondents), the sector worked in beforehand is most likely to have been manufacturing (61%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in associate Skilled Trades Occupations (38%), followed by Associate Professional and Technical Occupations (23%).

Occupational switching within the construction sector

- Two fifths of all construction workers in the North West (39%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is higher than in 2015 (31%) and compared to the UK average in 2018/19 (36%). The proportion that has worked in more than one role is higher amongst those with Level 4+ qualifications (57%) and those in a supervisory or management role (55%).
- Workers are most likely to have previously worked as a labourer/general operative (30%); while a quarter have worked as a bricklayer (24%) and a fifth as carpenters/joiners (21%).
- Thinking about their future plans in the construction sector, just over three-quarters of construction workers in the North West would like to carry on in the same trade or occupation (76%), while just over 1 in 6 would like to change their trade/occupation (16%) and a further 1 in 50 would like to leave the construction altogether (2%). The proportion that wants to carry on as they are is slightly lower in the North West than the UK average (80%).
- The most popular occupation that construction workers in the North West would like to change to is site manager (58% of those who would like to change).



- Nine-in-ten of construction workers in the North West that would like to change trade/occupation (91%) believe that they will require further training or qualifications in order to do so. This is a higher proportion than the UK average (87%).
- The most commonly cited reason for wanting to change trade/occupation is the belief that workers will be better paid (71%), followed by workers wanting more interesting work or being bored with what they are currently doing (47%), wanting the opportunity to use their skills/abilities better (47%), hoping to take on more responsibility (38%) and wanting to find less physical work (33%).

Qualifications and skills

Skills cards/certificates

- Most construction workers in the North West as across the UK as a whole hold some form of construction skill card or certificate (98% cf. 97% in 2015, 99% in 2012 and a UK average in 2018/19 of 97%).
- Younger workers (88% of 16-19 year olds) and those who have worked in construction for less than a year (80%) remain less likely to hold a skill card/certificate.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (89% in the North West; 85% across the UK).
- Card colours vary by age and particularly by occupation; younger workers are more likely to hold Red Trainee cards (38% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Black cards (18% of 45+ year olds); labourers/general operatives are most likely to hold Green cards (73%); and plant and machine operatives (70%) are most likely to hold Blue cards.

Construction-specific qualifications

- 68% per cent of construction workers in the North West say they had no formal qualifications when they first started working in the construction industry. This compares with a slightly higher UK average (72%).
- By current trade/occupation, the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (85%) and lowest among carpenters/joiners (53%).
- Compared with the three in ten construction workers in the North West that had qualifications when they first started working in construction (31%), nearly four-fifths of all construction workers in the region now report holding some sort of construction-related qualification (78%, compared with 71% in 2015 and a UK average in 2018/19 of 71%).
- Within the North West, the proportion of workers that currently hold any qualifications is lower than average amongst workers who have worked in construction for less than a year (53%). Two-thirds of the youngest age group hold qualifications (63% of 16-19 year olds), which is lower than other age groups but not significantly so.



- By trade/occupation, proportions vary from the majority of site managers (92%), carpenters/joiners (91%) and bricklayers (83%) down to less than half of labourers/general operatives (46%).
- The qualifications most likely to be held by construction workers in the North West are NVQ/SVQ qualifications (61% of those with qualifications) while 1 in 8 construction workers in the region with qualifications hold City & Guilds qualifications (12%). Just 2% of construction workers with qualifications now hold an apprenticeship.

Basic skill needs

- One in sixteen construction workers in the North West believe they would benefit from some form of training in basic skills (6%), which is a smaller proportion than in previous years (10% in 2015 and 17% in 2012) and than the UK average in 2018/19 (11%).
- In terms of the type of training required, there is an almost even split across reading, writing, speaking English and Maths.

Current study for qualifications

- One in six construction workers in the North West are currently working towards formal qualifications relevant to the construction industry (18% cf. 14% in 2015, 12% in 2012 and a UK average in 2018/19 of 15%). This proportion is higher amongst 16-19 year olds (75%) and amongst those who have worked within the construction industry for under 5 years (34%).
- Amongst workers with no qualifications, 18% are currently working towards a qualification.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role, more than two-fifths are certain that they would not like to do so (43%), a lower proportion than across the UK (51%), while 1 in 3 would like to do so (30% cf. 20% in 2015) and a fifth are unsure (27%).
- Two in five construction workers in the North West (39%) and just over four-fifths of those who have had some form of supervisory or management responsibilities (83% cf. 64% in 2015 and 55% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions are roughly in line with the UK average (34% and 81% respectively).
- SMSTS (Site Manager Safety Training Scheme) is most frequently mentioned as the type of training received (53%), followed by in-house training (45%) and Site Safety Supervisors Courses (24%).

Overall skill levels

- The vast majority of construction workers in the North West (99%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. Just over one-sixth of



North West construction workers (17%) hold a skill card/certificate, but have no other construction qualification. This compares with a higher UK average of 22%.

- Overall, more than two-thirds of North West construction workers that provided a response have qualifications equivalent to Level 2 or above (67% cf. 67% in 2015, 62% in 2012 and 59% across the UK in 2018/19); a third hold qualifications equivalent to Level 3 or above (32% cf. 35% in 2015 and 24% in 2012).

Geographic mobility

Work history in the region/nation

- The fact that they grew up there/have always lived there (60%) or that their employer sent them there (46%) are the most likely reasons why construction workers are based within the North West. A higher proportion state that it is because their employer sent them there in 2018/19 than in 2015 (24% in 2015) and this reflects the UK-wide picture.
- In 2018/19 compared with 2015, a higher proportion of construction workers in the North West have worked within their current region for their entire construction career (55% cf. 48% in 2015 and 30% in 2012) and the majority of construction workers in the region have remained in the North West for all or most of their career (87%). This is higher than the UK average of 77%.
- Nine-tenths of construction workers in the North West (91%) were also based in the region for their last job and this proportion is higher than in 2015 (89%).

Worker origins

- Overall, more than four-fifths of all construction workers in the North West were living in the region when they started their construction career (87% cf. 91% in 2015). There are considerable variations in the extent to which workers have remained in their original locality, with the proportion being highest in Scotland (96%) and Northern Ireland (95%) and lowest in the East of England (44%).
- More than four-fifths of construction workers in the North West (85%) have remained in the same region in which they did their first qualification/training. Compared with other regions/nations, this is in the mid-range with the highest proportion by region/nation within Scotland (96%) and the lowest within the South East (41%).

Travel to site

- Two-fifths of construction workers in the North West have travelled at least 50 miles from their permanent/current home to work in the last 12 months (38%). Across the regions/nations, North West construction workers are amongst those least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (14%).
- Overall, just 3% of construction workers in the North West (2% in 2015) are currently staying in temporary accommodation while working at their site. This proportion is slightly lower than the UK average (5%).



- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 13 miles (18 miles is the UK average) which is lower than in 2015 when workers in the region travelled an average (mean) of 21 miles.

Site duration and change

- Over half the temporary workers in the North West (57%) do not know how much longer they can expect to be working for their current company/agency. This compares with a UK average of 38%.
- All respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase. A fifth expect to stay on that site for a year or longer (22% cf. UK average of 18%), which is a small decrease compared with 2015 (23%). However, in one in eight cases (13% cf. 27% in 2015) workers do not know how much longer they can expect to be on site, indicating a decrease in the degree of uncertainty in the last 3-4 years.
- More than four-fifths of all North West construction workers are confident that, when they finish their current job, their next job will allow them to travel to work from their permanent home on a daily basis (86% cf. 79% in 2015 and 65% in 2012). This is a similar proportion to the UK average in 2018/19 (84%). The remaining 14% say it depends/they don't know or that they won't be able to commute.

Sub-sector and sector mobility

Sub-sector mobility

- As in 2015, the vast majority of construction workers in the North West have worked on new housing (88% in 2018/19 cf. 93% in 2015 and 72% in 2012). For all other types of projects the proportion of construction workers that have worked on them has risen since 2012.
- Overall, just over a quarter of all construction workers in the North West have only worked on one project type (28%), which is a lower proportion than in 2015 (43%) and similar to other regions/nations (UK average is 30%).

Leaving the sector

- In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Amongst construction workers of all ages in the North West, almost half say they definitely will be (48% cf. UK average of 48%); a further two-fifths think it is very or quite likely (41%); 2% consider it unlikely; and just 1% say they definitely won't be. A further 4% hope to be retired by then, while 5% 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, 282 interviews were conducted in the North West.



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
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.

'*' is used to denote a statistic of less than 0.5% but greater than 0.

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.

North West is referred to by the abbreviation 'NW' in tables.

Profile of construction site workers

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

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

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

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



Personal demographics

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

The vast majority of construction workers in manual roles interviewed in the North West were male (98%). Male dominance is greater in the survey sample than in the UK construction workforce as a whole as this survey does not include those in office-based roles within the construction industry (either administrative or professional, where the incidence of female workers is higher) and interviews were conducted on relatively large construction sites (valued at £250,000+, with at least 10 workers), thereby excluding female construction workers on small building sites and in maintenance and repair.

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

	NW 2018/19 %	NW 2018/19 %		UK Workforce* %
Male	98	98	Male	53
Female	2	1	Female	47
Transgender	0	<0.5	Transgender	-
Non-binary	0	<0.5	Non-binary	-
Prefer not to say	0	<0.5	Prefer not to say	-
<i>Unweighted bases</i>	282	4048		32,277,500

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



Within the North West, the youngest age group (16 to 24 year olds) account for a sixth of construction workers (16%), a slightly lower proportion than in 2015 (19%) and 2012 (20%). Compared with 2015, there is a higher proportion of workers aged 25 to 34 years (32% cf. 26%) while the proportion of workers aged 35 to 44 is slightly lower than in 2015 (19% cf. 21%). There are fewer 45 to 54-year olds among North West construction workers compared with 2015 (20% cf. 24%) while the proportion of workers aged 55 or over increased (13% in 2018/19 cf. 10% in 2015). Workers aged 60 and over account for just 3% of construction workers.

Compared with the UK construction workforce overall there is a slightly higher proportion of construction workers aged under 35 years within the North West (48% in the North West; 45% across the UK cf. 36% of economically active adults across the UK).

Figure 3: Age profile of the sample compared with 2012 & the Annual Population Survey

Base: All respondents

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %		UK Workforce* %
16 to 19 years	6	7	5	7	5	16 to 19 years	4
20 to 24 years	11	12	15	16	12	20 to 24 years	9
25 to 34 years	32	26	28	23	28	25 to 34 years	23
35 to 44 years	19	21	26	27	23	35 to 49 years	33
45 to 54 years	20	24	17	15	20	50 to 64 years	27
55 to 59 years	11	7	8	10	7		
60+ years	3	3			4	65+ years	4
<i>Unweighted bases</i>	282	435	442	342	4048		32,277,500

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

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

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



Figure 4: Ethnic profile of the sample compared with 2012 and UK Population

Base: All respondents

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %	UK Population aged 16-64* %
White	97	98	98	99	94	85
Black	<0.5	<0.5	1	<0.5	2	3
Asian	1	<0.5	1	<0.5	2	6
Mixed	1	-	-	-	1	1
Other/Not stated	<0.5	1	1	-	<0.5	4
<i>Unweighted bases</i>	282	435	442	342	4084	41,217,200

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

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

Compared with the North West population as a whole (aged 16-64) a lower proportion of North West construction workers are of BME origins (3% cf. 12% amongst the North West population and 15% of the UK population).

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

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

Base: All respondents

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

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



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

The majority of construction workers in the North West (97%) originated from the UK and the remaining 3% originated from outside of the UK. No more than 1% of construction workers originate from a single specified country, with 2% of construction workers originating from an EU country other than the UK.

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

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

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

Just 4% of construction workers in the North West hold a passport for another country. This compares with a UK average of 14%. The majority hold a UK passport (89%), with a further 6% reporting that they do not have a passport. Of those with a non-UK passport, all of those in the sample (100%, equating to 4% of all North West construction workers) state that it is an EU member state passport.

Of those construction workers in the North West that were born outside of the UK or have a non-UK passport, 14% have British citizenship, equal to the UK average (also 14%).

Overall, most North West construction workers have lived in the UK all of their life (91%). This proportion is significantly higher than the UK average (80%).

Amongst all North West construction workers 3% indicate that they have a long term illness, health problem or disability which limits the type of work they can do. The most common illness/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 (38%). The next most common were hearing loss (13%), mental illness (13%) and physical co-ordination issues



(13%). Across the UK, 3% of construction workers indicate they have a long-term illness, health problem or disability, and the most common condition is a reduced physical capacity (50%).

Occupational profile

Current job role

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

In 2018/19 labourers/general operatives, site managers and carpenters/joiners are the top three occupations amongst construction workers in the North West. This reflects the profile across the UK, although there are more site managers within the North West. There has been a decrease in the proportion that are bricklayers since 2015 (from 17% in 2015 to 10% in 2018/19) and a slightly lower proportion of bricklayers within the North West workforce than across the UK.



Figure 7: Occupational profile

Base: All respondents '-' = not applicable

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
Labourer/ General Operative	18	15	23	19	16
Site Manager	17	8	0	0	11
Carpenter/Joiner	11	15	15	15	10
Bricklayer	10	17	5	15	11
Plant/Machine Operative	8	9	6	11	7
Technical e.g. surveyor, maintenance technician	6	1	1	-	4
Scaffolder	3	3	7	3	4
Plumber	3	5	5	4	4
Ground Worker	3	5	-	-	4
Electrician	3	5	7	3	6
Painter/Decorator	2	2	4	1	2
Dryliner	2	2	2	With Plasterer	3
Banksman/Banksperson	2	2	1	3	1
Pipe Fitter	2	1	3	6	2
Supervisor/foreman	2	1	<0.5	4	2
Project Manager	2	-	-	-	1
Plasterer	1	4	2	3	1
Floorer	1	1	4	1	<0.5
Steel Erector/Rigger	1	-	-	-	1
Contracts Manager	1	-	-	-	<0.5
Other	1	0	0	0	3
<i>Unweighted bases</i>	22	435	442	324	4048

Q5

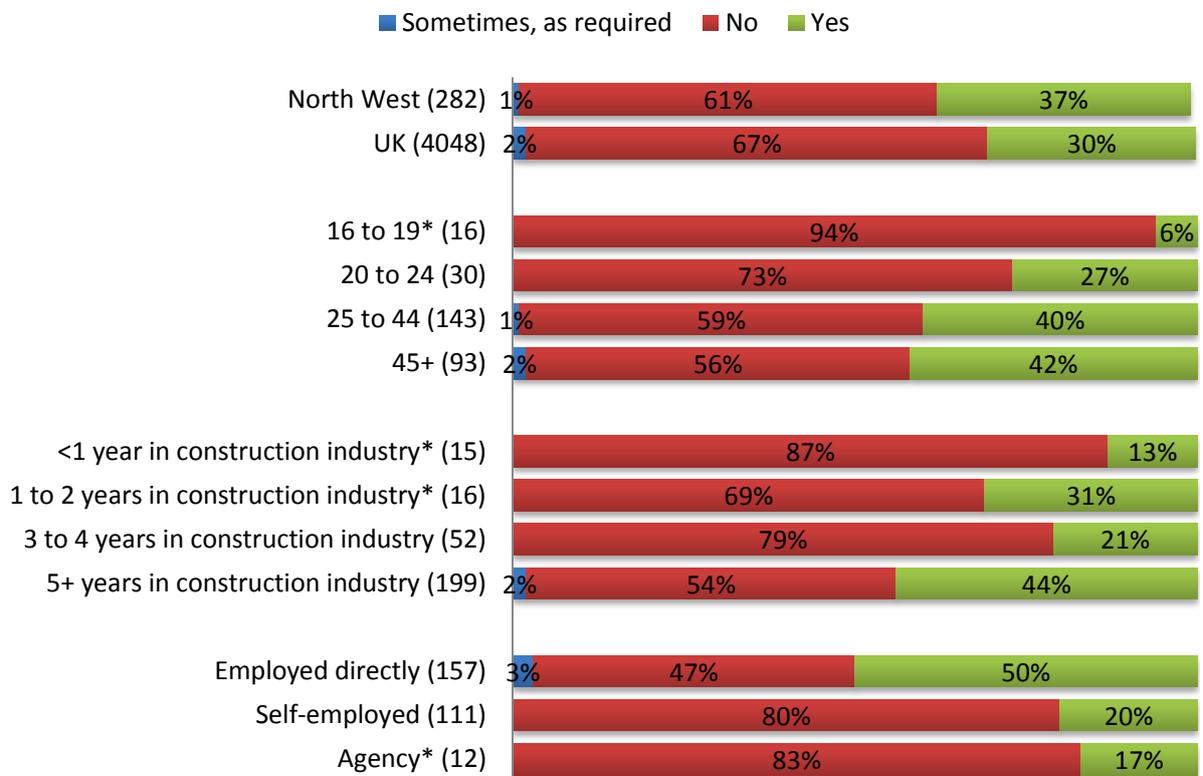


Supervisory roles

Over a third of all construction workers in the North West interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (37%). This is a higher proportion than in 2015 (25%) and the UK average in 2018/19 (30%). The incidence of workers in a supervisory role is considerably lower amongst workers aged under 25 and amongst those that have worked in the construction industry for less than 5 years, as one would expect. Workers who are directly employed by a company (50%) are more likely than those that are self-employed (20%) or work for an agency (17%) to perform a supervisory or management role. These differences are summarised in the following figure.

Figure 8: Whether respondents perform a supervisory or management role

Base: All respondents *Caution: small sample base



Unweighted bases in parentheses Q8



Employment status

The highest proportion of construction workers within the 2018/19 North West sample is employed directly by a company (56%). This is a slightly lower proportion than in 2015 (57%) but higher than in 2012 (52%). Half the respondents who have been working in the construction sector for at least 5 years (52%) are directly employed, compared with 65% of those who have worked in the industry for less than 5 years.

Two-fifths of construction workers within the 2018/19 North West sample is self-employed (39%), similar to 2015 (40%) but lower than 2012 (44%).

The proportion of workers who are self-employed increases by age from 13% of 16 to 19-year olds to 44% of workers aged 25 to 44. The proportion of respondents that are self-employed increases to 76% of bricklayers. Just 4% of the sample is accounted for by construction workers who are working for an employment agency, the same as the proportion reported in 2015 and 2012 (both 4%).

Figure 9: Employment status

Base: All respondents *Caution: small sample base

	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2018/19 %	Years working in construction			
					<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	56	57	52	49	87	56	62	52
Self-employed	39	40	44	43	13	38	35	43
Working for an employment agency	4	4	4	7	0	6	4	5
Working on some other basis	1	0	0	<0.5	0	0	0	1
<i>Unweighted bases</i>	282	435	442	4048	15*	16*	52	199

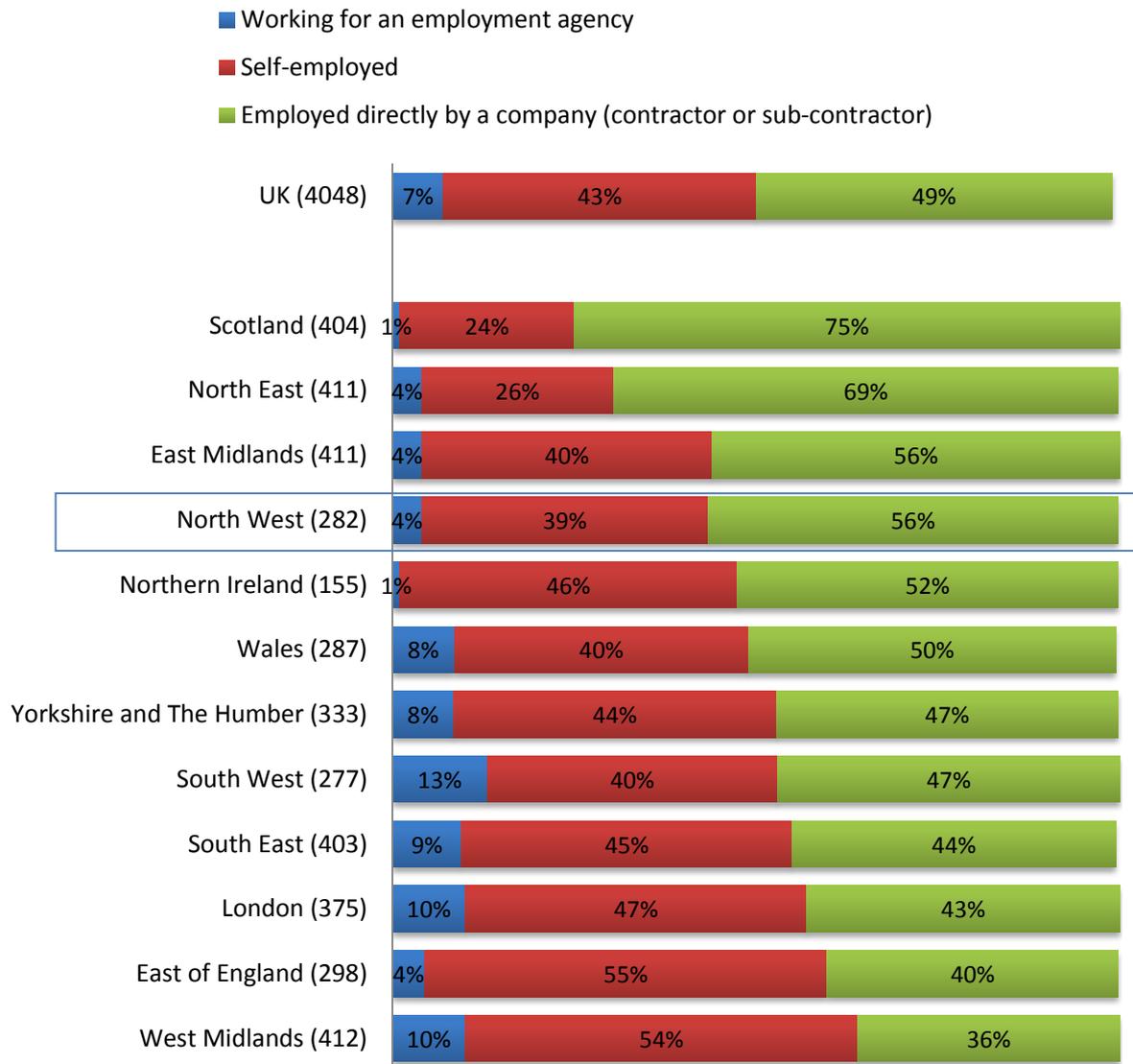
Q20



The North West has an employment status profile that differs significantly from the UK average. Compared with UK construction workers, those in the North West are more likely to be directly employed and less likely to be self-employed and agency workers.

Figure 10: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses Q20



Employment contract basis

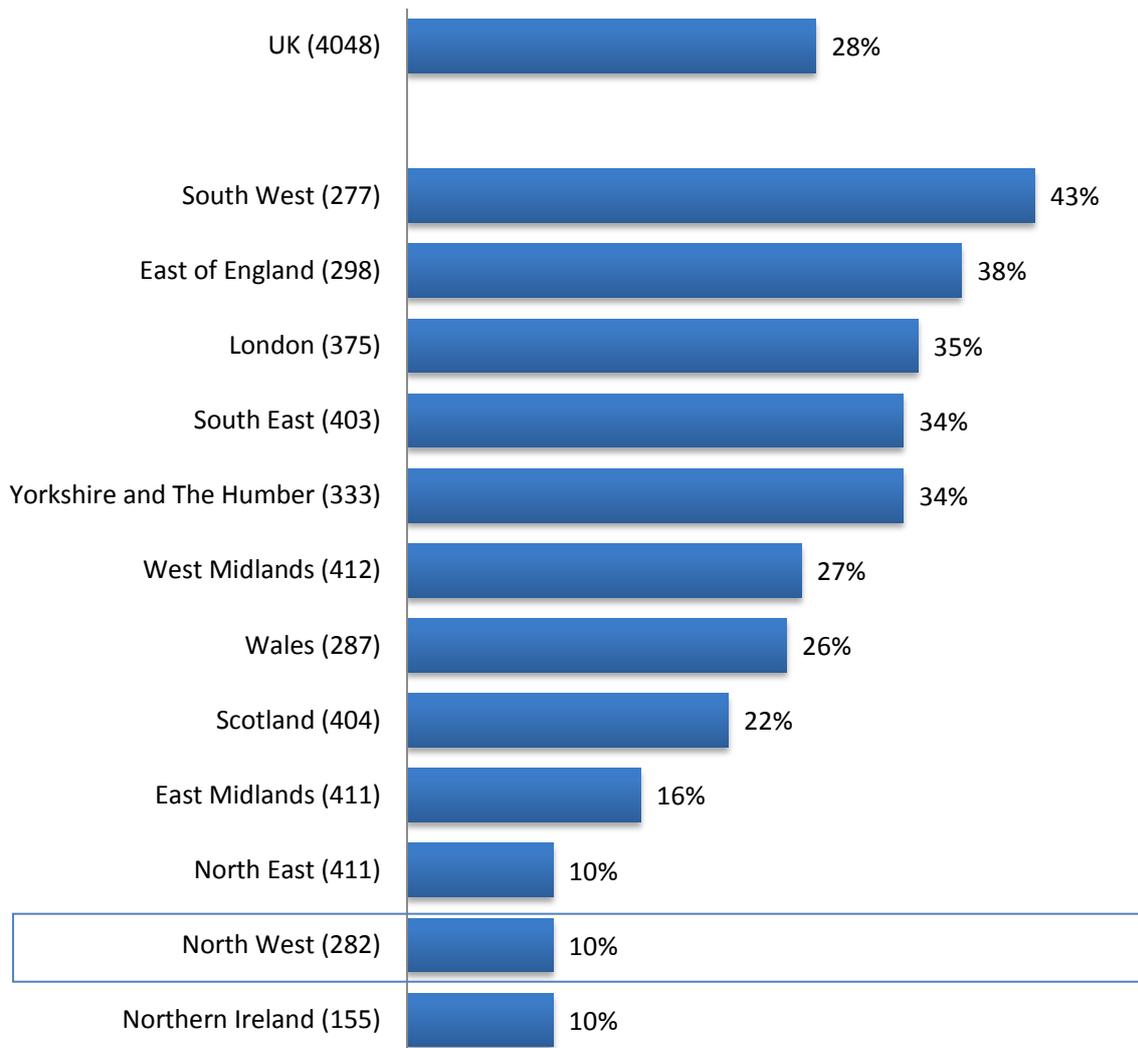
Overall, one in ten North West construction workers (10%) is employed on a temporary rather than permanent basis (90%). This reflects a move towards more permanent employment in 2018/19 compared with 2015 when a quarter (22%) were employed on a temporary basis.

Amongst workers who are employed by an agency, the proportion on temporary contracts is higher, than it is amongst those who are self-employed or employed directly (50%, compared with 89% and 94% respectively).

The North West is significantly lower than the UK average in the profile of its construction workforce in terms of temporary employment contracts held, as the following figure illustrates.

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

Base: All respondents



Unweighted bases in parentheses Q21

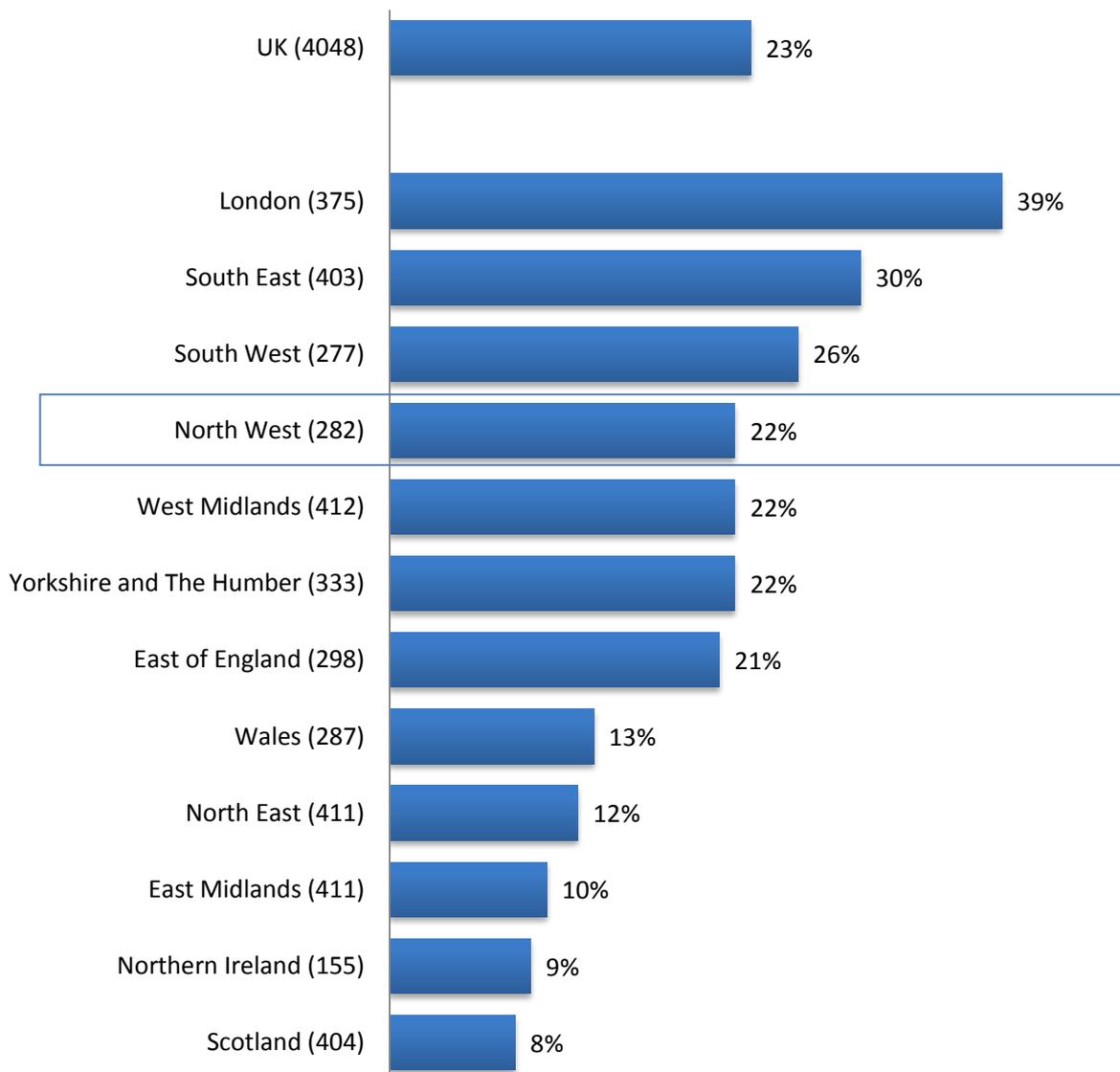


By current trade/role, the proportion working on a temporary basis is highest amongst carpenters/joiners (19%) and labour/general operatives (17%) and lowest amongst plant/machine operatives (4%) and site managers (6%).

Hours worked

Construction workers in the North West, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (54%, compared with a UK average of 60%). A fifth (22%) works more than 50 hours a week, which is similar to the UK average (23%).

Figure 12: Proportion of workers that typically work 50 or more hours per week
 Base: All respondents Unweighted bases in parentheses



Unweighted bases in parentheses Q22



Work histories

Time in the sector

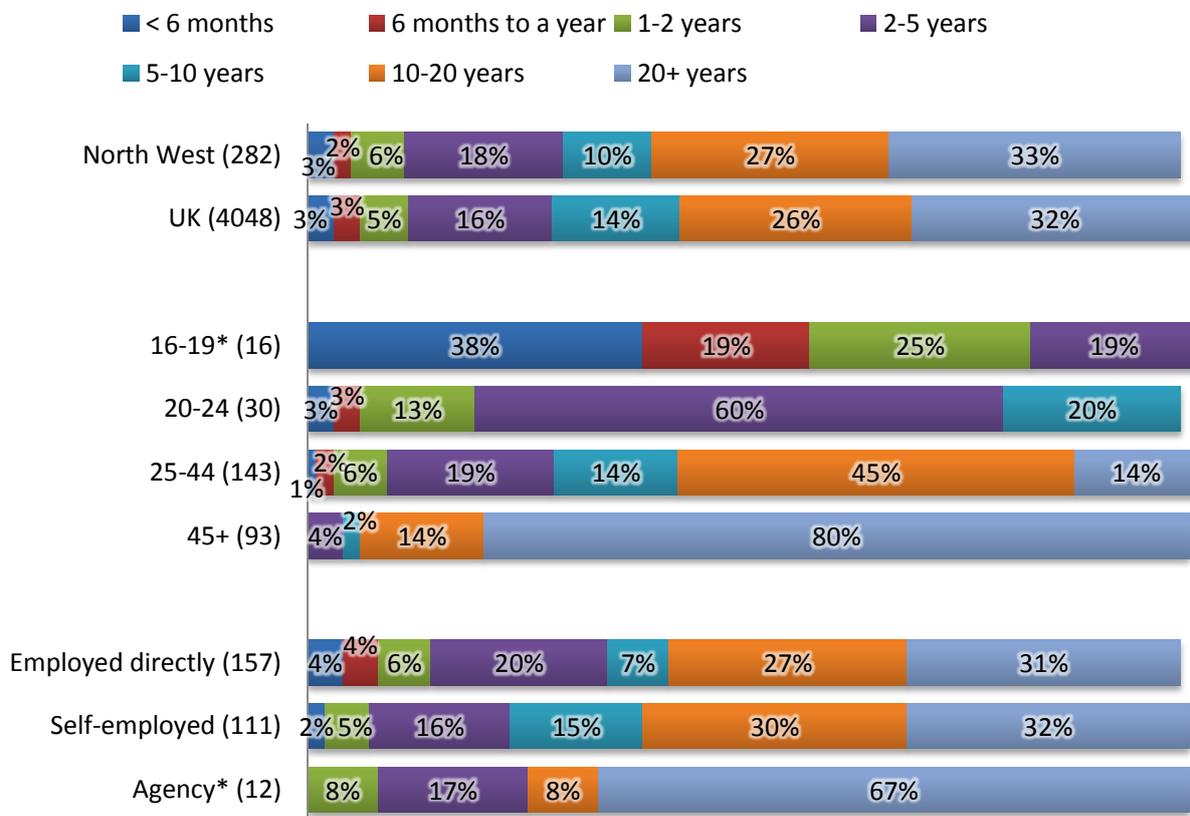
A third of North West construction workers have worked in the construction industry for over 20 years (33%) and three-fifths have worked in the industry for at least 10 years (61%).

Construction workers in the North West are slightly more likely than the UK average to have worked in industry for over 20 years (33% cf. 32% across the UK).

The length of experience in the industry increases with age to around four-fifths of workers aged 45 and over in the North West that have more than 20 years' experience of working in the construction sector (80%).

Figure 13: Years spent working in the construction sector

Base: All respondents Unweighted bases in parentheses *Caution: small sample base



Unweighted bases in parentheses Q1



Compared with 2015, Figure 14 shows that, in 2018/19, workers are more likely to have worked in the construction sector for less than 20 years; 33% have 20+ years' experience, compared with 40% in 2015, whilst 39% have 10 or fewer years' experience, compared with 35% in 2015.

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

Base: All respondents

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
Less than 6 months	3	4	1	4	3
Up to a year	5	6	5	11	6
Up to 2 years	11	12	9	16	12
Up to 5 years	29	21	19	30	28
Up to 10 years	39	35	42	43	42
Up to 20 years	67	60	71	71	68
More than 20 years	33	40	29	29	32
<i>Unweighted bases</i>	282	435	442	342	4048



Pre-construction employment histories

Nearly two-thirds in the North West have only ever worked in the construction industry (61% cf. 67% across the UK and 78% within the North West in 2015). This includes a half who have worked in construction pretty much continuously (49%); 9% for whom this is their first job; and a further 4% that have only ever worked in the construction sector but have had spells out of work.

The likelihood that workers have worked continuously in construction increases with age; up to nearly three-fifths of workers aged 45 and over (58%). Younger workers are more likely to say that this is their first job and that they have not worked in any other industry (38% of 16 to 19 year olds and 20% of 20-24 year olds).

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

All respondents *Caution: small sample base

	NW 2018/19 %	NW 2015 %	UK 2018/19 %	Age %			
				16 to 19	20 to 24	25 to 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	49	60	56	44	33	47	58
I have only worked in construction jobs but have had spells of being out of work	4	5	4	0	3	3	5
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	8	5	7	6	3	10	8
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	25	12	23	13	30	29	20
This is my first job. I haven't worked in any other industry.	9	13	7	38	20	5	5
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	5	4	3	0	10	6	3
<i>Unweighted bases</i>	282	435	4048	16*	30	143	93

Q2



Overall, 1 in 4 construction workers in the North West 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 (25%). This is a higher proportion to that reported in 2015 (12%).

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 nearly two-thirds of cases, respondents had previously worked in manufacturing (61% cf. 45% across the UK) while 1 in 5 had worked in the wholesale and retail trade (17%).

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

Base: Where first job was not in construction

	NW 2018/19 %	NW 2015 %	UK 2018/19 %
C – Manufacturing	61	13	45
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	17	23	19
E - Water supply, sewerage, waste management and remediation activities	8	3	3
B – Mining and quarrying	4	1	6
I - Accommodation and food service activities	4	8	2
H - Transportation and storage	3	20	6
A - Agriculture, Forestry and Fishing	3	6	9
<i>Unweighted bases</i>	<i>71</i>	<i>71</i>	<i>862</i>

Q3

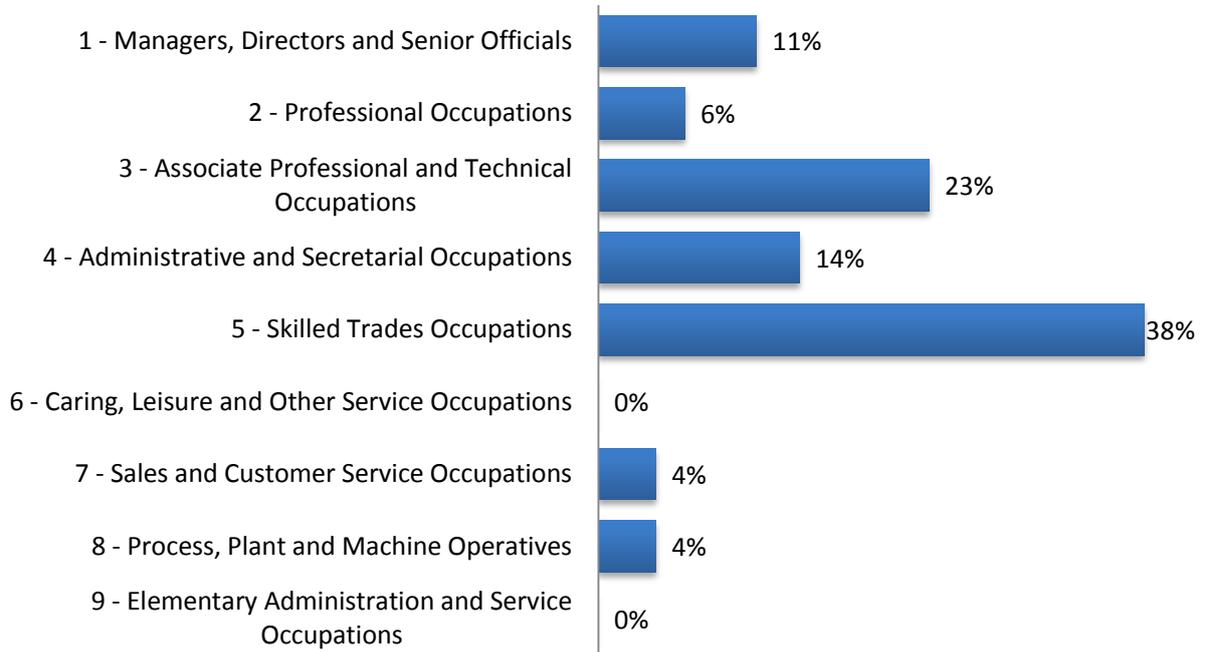


In terms of the job roles that North West construction workers have undertaken in other sectors, one quarter had worked in associate professional and technical occupations (23% cf. 28% across the UK) and around a third had worked in skilled trades occupations (38% cf. 27% across the UK).

Around 1 in 20 workers that had worked in other sectors had worked in professional occupations (6%), while slightly fewer had worked as process, plant and machine operatives (4%). These figures compare with 10% and 3% across the UK as a whole.

Figure 17: Job roles undertaken in other sectors

Base: Where first job was not in construction



Unweighted base = 71 Q3



Occupational switching and progression within construction

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

Overall, almost two in five construction workers in the North West have worked in more than one construction trade or occupation whilst working in the construction industry (39%), which is a higher proportion than in 2015 and compared with the UK average in 2018/19 (31% and 36% respectively).

The proportion of workers that have had more than one role increases with age (to 47% amongst those aged 45+ cf. 13% amongst those 16 to 19 years).

Workers with the highest level of qualifications (Level 4 and above) are more likely to have had more than one role or occupation within the construction sector (57%) as are those with a supervisory or management role on site (55%).

As in 2015, there are also variations by current job role. Site managers (75%) and plant/machine operatives (48%) are most likely to have had more than one role/occupation within construction. Carpenters/Joiners (16%) are least likely to have had any other trade within the construction sector. The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector.

Figure 18: Other construction roles undertaken, by current occupation

Base: All respondents

MORE likely to have had more than one role			LESS likely to have had more than one role		
	NW 2018/19 %	UK 2018/19 %		NW 2018/19 %	UK 2018/19 %
Site manager (48)	75	69	Labourer /Gen. Op. (52)	31	29
Plant /Mach. Op. (23)	48	55	Bricklayer (29)	28	24
			Carpenter/Joiner (32)	16	22

Unweighted bases for 2018/19 North West in parentheses

Q6



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

Workers are most likely to have previously worked as a labourer/general operative (30%) while a quarter have previously worked as a bricklayer (24%) and a fifth as a carpenter/joiner (21%).

Figure 19: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	NW 2018/19 %	UK 2018/19 %
Labourer/General operative	30	34
Bricklayer	24	12
Carpenter/joiner	21	19
Plant/machine operative (e.g. Fork lift/JCB)	12	10
Roofer	8	8
Plumber	7	5
Plasterer	6	8
Ground worker	6	5
Dryliner	5	8
Painter/decorator	5	7
Electrician	5	5
Banksman/Banksperson	4	6
Site manager	4	5
Ceiling fixer	4	5
Technical e.g. surveyor, maintenance technician	4	3
Scaffolder	3	4
Supervisor/foreman	3	1
Pipe fitter	2	4
Steel erector/rigger	2	4
Floorer	1	4
Welder	1	2
Other	3	7
<i>Unweighted base</i>	<i>110</i>	<i>1328</i>

Q7



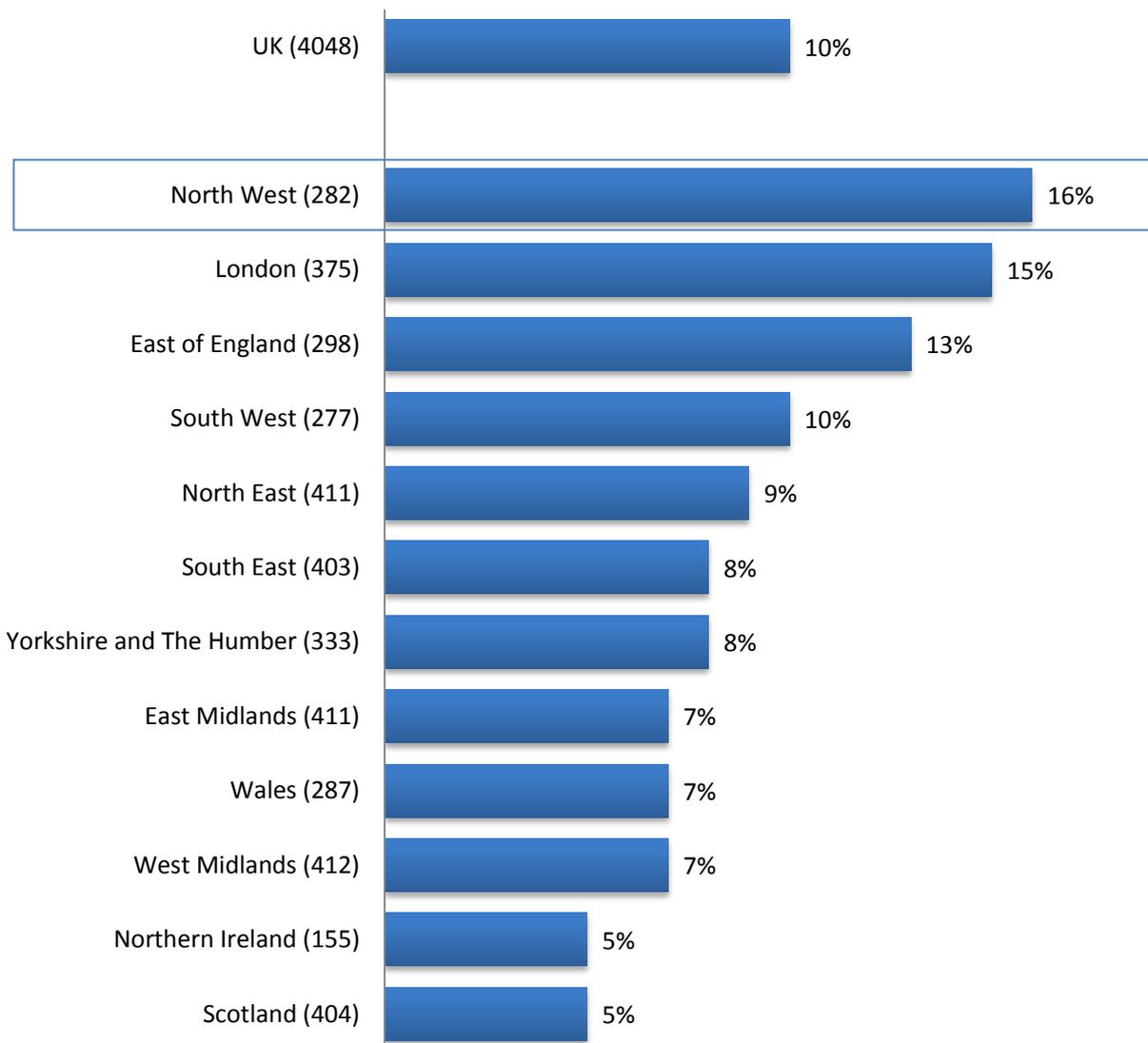
Future career plans

Thinking about their future plans in construction, three-quarters of construction workers in the North West would like to carry on in the same trade or occupation (76%); 1 in 6 would like to change their trade/occupation (16%); and a further 1 in 50 would like to leave construction (2%). The remainder (7%) are not sure.

Compared with the UK average, North West construction workers are slightly 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).

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

Base: All respondents



Unweighted bases in parentheses Q33



Construction workers aged 20 to 24 years are more likely than those in other age groups to want to change their trade or occupation (23%). Older workers are more likely than average to want to carry on as they are (86% of 45+ year olds).

By current trade/occupation, those working as site managers (90%) and bricklayers (90%) are most likely to want to carry on as they are.

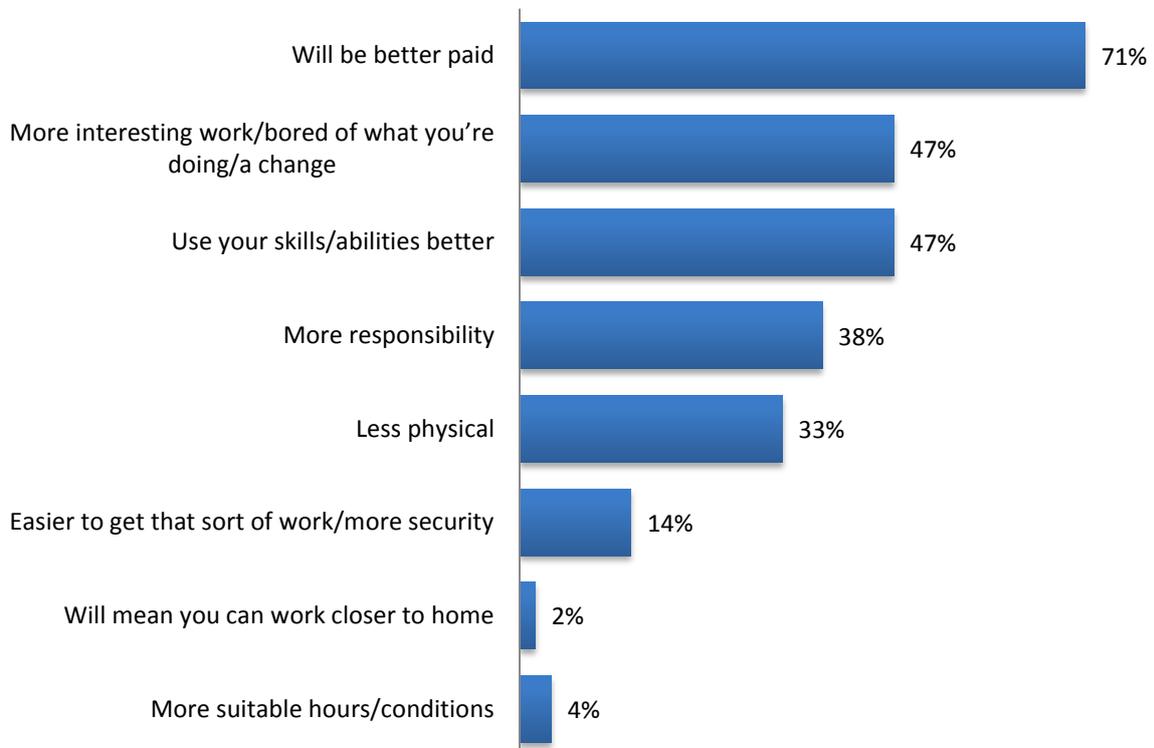
Amongst those who would like to change trade or occupation, a wide range of alternative trades/occupations are mentioned. However, the highest proportion overall would like to be a site manager (58%).

In 9 in 10 cases where construction workers in the North West would like to change trade or occupation, they believe they will require further training or qualifications in order to do this (91%). This compares to a lower proportion in 2015 (71%) and across the UK in 2018/19 (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (71%), while half believe they would have more interesting work (or that they are bored with what they are currently doing) (47%), and the same proportion want to use their skills/abilities better. Two-fifths hope to take on more responsibility (38%) while a third want work that is less physical (33%).

Figure 21: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 45 Q36



Qualifications and skills

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

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

Construction skill cards and certificates

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

Figure 22 summarises the proportion of workers by region/nation that hold any card and compares these proportions with previous surveys and the UK as a whole. Workers in the North West are amongst those most likely to hold skill certificates or cards and the proportion is similar to that in 2015 (97%) and 2012 (99%).

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

Base: All respondents

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



As in previous surveys, the incidence of workers holding skill cards or certificates remains lower amongst younger workers (88% amongst 16 to 19 year olds) and those who have worked within construction for a shorter period of time (80% amongst those that have worked in the industry for less than a year). This suggests that employers are not always ensuring that new employees are immediately made aware of the need to prepare for, or acquire, a CSCS card (or similar) and/or that young trainees are starting work/placements without the assurance that comes from having achieved such an accreditation. Within the North West there has been worsening in this respect with younger workers and workers that have started working in construction in the last year less likely than they were in 2015 to hold a skill card or certificate.

Figure 23: Proportion of workers that have a skill card/certificate, by other variables
*Base: All respondents * caution: small sample base*

		NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
Total (282)		98	97	98	75	97
Age	16 to 19 years* (16)	88	90	92	30	85
	20 to 24 years (30)	100	98	92	75	97
	25 to 44 years (143)	99	99	100	81	98
	45+ years (93)	98	97	100	77	98
Length of time in construction	<1 year in construction* (15)	80	91	71	65	89
	1 to 2 years* (16)	100	100	100	61	97
	2 to 5 years (52)	100	94	100	69	96
	5+ years (199)	99	98	100	78	98
Contract-type	Employed directly (157)	98	97	99	77	96
	Self- employed (111)	100	98	97	68	98
	Agency* (12)	100	100	100	0	97
<i>Unweighted bases for 2018/19 North West in parentheses</i>						

Q12



In terms of the type of skill card or certificate held by construction workers in the North West the CSCS (Construction Skills Certification Scheme (GB)) is the most commonly held (89%), as it was in 2015 (90%). Overall, 12% hold the CPCS (Construction Plant Competence Scheme) card/certificate and this proportion increases to 20% amongst workers aged 45+.

Figure 24: Type of skill card/certificate held

Base: All respondents

	NW 2018/19 %	NW 2015 %	NW 2012 %	UK 2018/19 %
CSCS (Construction Skills Certification Scheme) (GB)	89	90	92	85
CSR (Construction Skills Register) (NI)	1	<0.5		3
CISRS (Construction Industry Scaffolders Record Scheme)	2	3	7	3
CPCS (Construction Plant Competence Scheme)	12	13	13	11
Other	2	4	9	4
<i>Unweighted bases</i>	282	435	442	4048

Q12

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

- Plant/machine operatives (70%) are more likely to hold CPCS (Construction Plant Competence Scheme);
- At least 94% of carpenters/joiners (97%), bricklayers (97%), site managers (94%) and labourers/general operatives (94%) hold CSCS (Construction Skills Certification Scheme (GB)).



Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 25 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Overall, within the North West 3% of CSCS card holders have Red Trainee cards and 2% have Red Experienced worker cards; over a quarter of CSCS (27%) card holders have Green cards and/or Blue cards (29%). Around in ten CSCS card holders hold Gold cards for advanced craft/skilled workers (13%) and 6% have the Gold card for supervisors.

Figure 25: Colour of CSCS/CSR cards held

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

	CSCS %		CSR* %
Red – Trainee	3	Red – Apprenticeship/Trainee	33
Red – Experienced worker card	2	Red – Trained Plant Operator	0
Red – Trainee Supervisor/ Manager	33	Red – Trainee Supervisor/Manager	33
Green – construction site operative card for general site workers	27	Green – Construction Operative (for general site workers)	0
Blue – skilled	29	Blue – Operative/ Craft	0
Gold – supervisor card	6	Gold – Craft/Supervisor Card	0
Gold – Advanced craft/skilled worker	13	Gold – Advanced Scaffolder	0
Black – contracts manager card	8	Black – Senior Managers Card	0
Academically Qualified Persons Card	5	Platinum – Manager Card (manager card for NVQ/SVQ Level 4 achievers or industry accreditation/assessment)	33
Construction Site Visitor Card	1		
Apprentice Card	1		
Other	1	Other	0
Unsure	3	Unsure	0
<i>Unweighted bases</i>	250		3



Younger workers are more likely to hold Red Trainee cards (38% of 16 to 19 year olds with a CSCS card), while older workers are more likely to hold Black cards (18% of 45+ year olds). Workers currently employed by an agency are more likely to hold Green cards (73%), compared with those employed directly or self-employed (29% and 20% respectively).

Card colours also vary according to current occupation/trade, as Figure 26 summarises. Labourers/general operatives are most likely to hold Green cards (73%); and plant and machine operatives (70%) are most likely to hold Blue cards.

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

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

	Unweighted bases	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold %	Black %
Labourer / Gen. Op.	49	2	2	73	18	2	0
Plant / Mach. Op.*	10	0	10	10	70	0	0
Carpenter / Joiner	31	6	0	6	45	35	0
Bricklayer	28	4	4	14	39	32	4
Site manager	45	2	2	16	4	18	38



Construction qualifications held

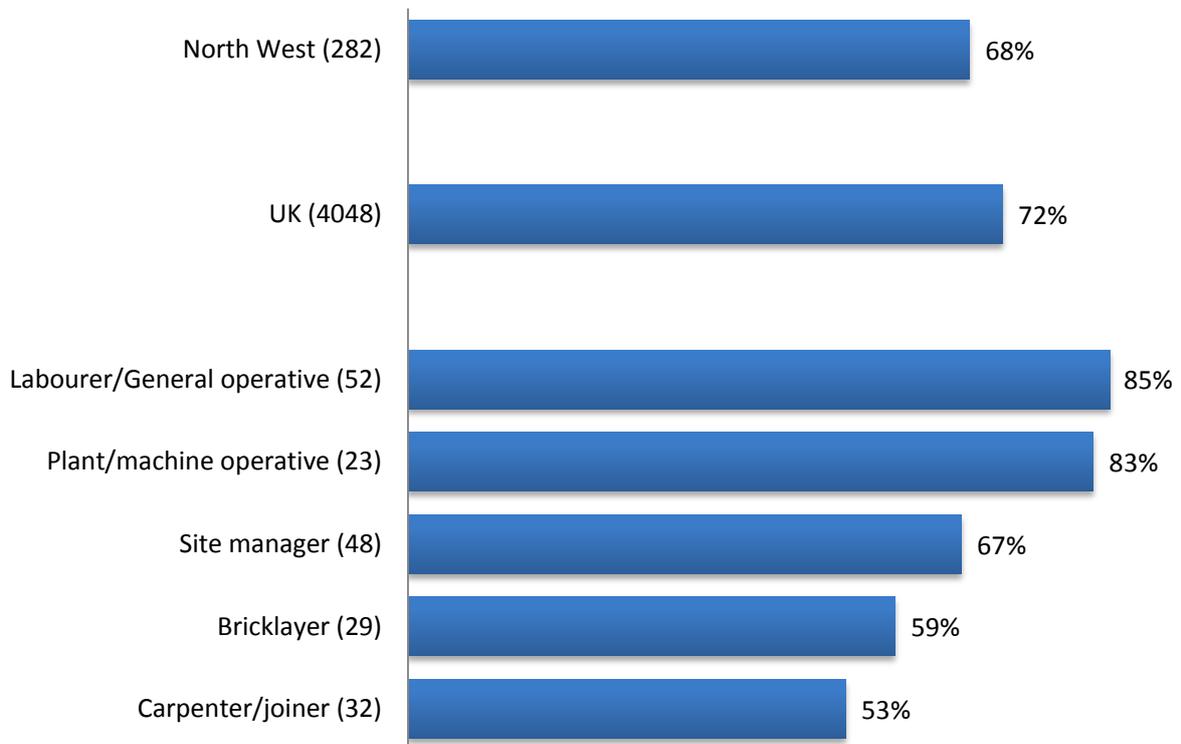
All workers were asked about the construction-specific qualifications they held after leaving full-time education and starting their first job in construction.

Overall, 68% of construction workers in the North West say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 67% in 2015 and 72% of all UK construction workers in 2018/19.

By current trade/occupation within the North West, the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (85%) and lowest among carpenters/joiners (53%).

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

Base: All respondents



Unweighted bases in parentheses Q15/Q16



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

Overall, nearly four-fifths of North West construction workers reported holding some sort of construction-related qualification at the time of interview (78%), an increase compared with the proportion in 2015 (71%) and significantly higher than the UK average (72%).

As Figure 28 summarises, the proportion of workers that hold any qualifications is lower than average amongst those who have worked in construction for less than a year (53%), those aged 16-19 (63%), and those employed by an agency (58%), although all of these estimates are based on small sample bases.

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

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

		NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
Total (282)		78	71	70	59	72
Age	16 to 19 years* (16)	63	64	58	32	52
	20 to 24 years (30)	80	62	71	48	63
	25 to 44 years (143)	83	76	75	68	74
	45+ years (93)	74	68	63	58	76
Length of time in construction	<1 year (15*)	53	35	32	21	34
	1 to 2 years (16*)	56	70	74	33	52
	2 to 5 years (52)	77	54	62	56	63
	5+ years (199)	82	76	73	66	79
Current contract type	Employed directly (157)	78	71	69	57	75
	Self- employed (111)	80	74	71	70	73
	Agency (12*)	58	44	71	0	49

Unweighted bases for 2018/19 North West in parentheses

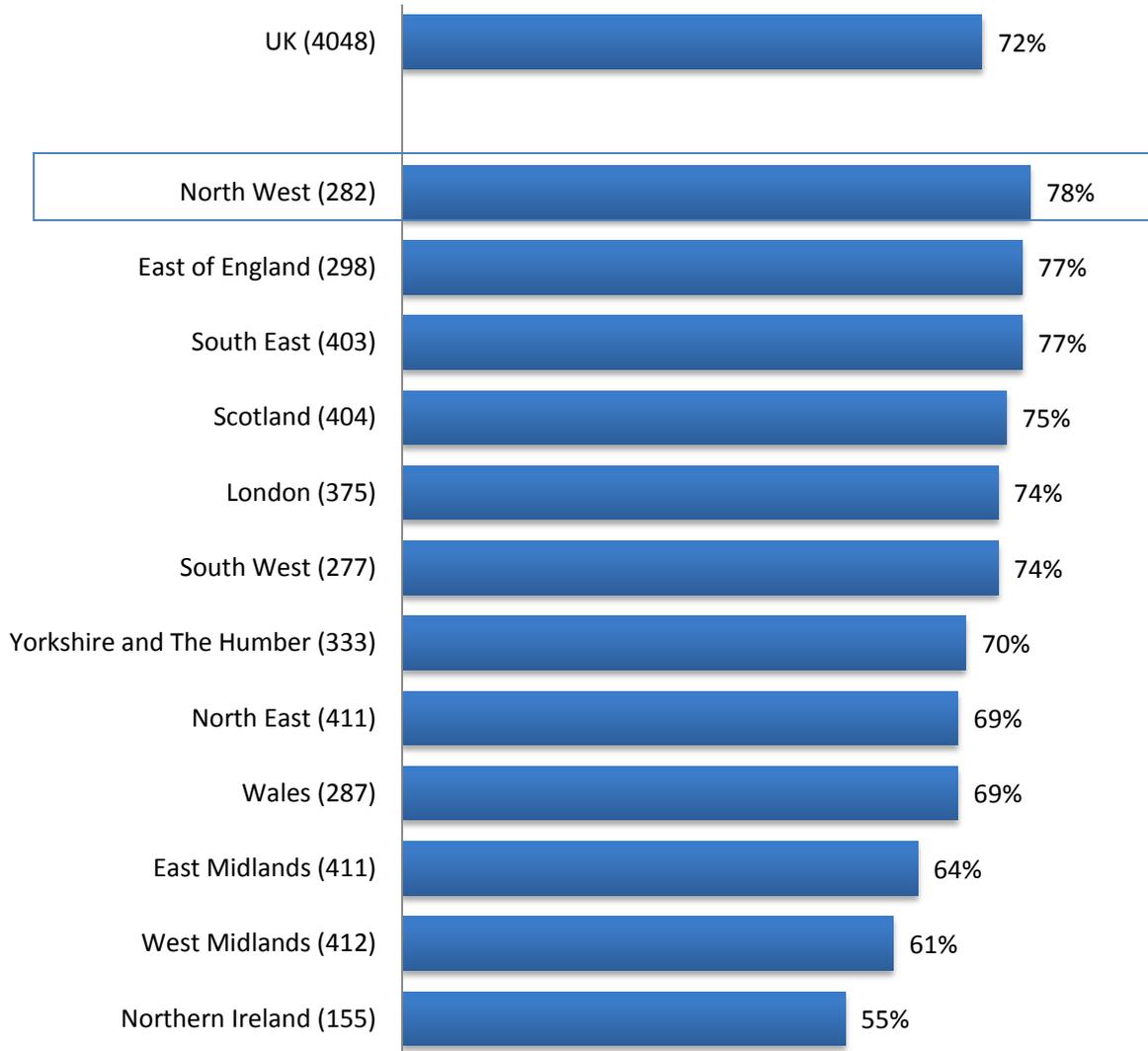
Q15/Q16



Construction workers in the North West are among those most likely to hold construction-specific qualifications, and the North-West is significantly above the UK average in terms of the propensity of its construction workforce to hold any construction-specific qualifications (see Figure 29).

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

Base: All respondents



Unweighted bases in parentheses Q15/Q16

The likelihood that workers hold any qualifications also varies significantly by current job role. Site managers (92%) and carpenters/joiners (91%) are most likely to hold qualifications, while labourers/general operatives (46%) are least likely.



Type of construction qualifications held

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

The qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (61%), which is lower than the proportion reported in 2015 in the North West (71% in 2015) and higher than the UK 2018/19 average (58%). One in eight North West construction workers with qualifications holds City & Guilds qualifications (12%), a lower proportion than in 2015 (22%) and also slightly lower than the UK 2018/19 average (14%). In the North West, just 2% of construction workers with qualifications hold an apprenticeship. This is much lower than in 2015 (17%) and lower than the UK average in 2018/19 (6%).

Figure 30: Main type of qualification held

Base: Workers with qualifications (valid responses)

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
NVQ/SVQ	61	71	74	60	58
City & Guilds	12	22	16	32	14
Apprenticeship	2	17	3	0	6
HNC/HND/BTEC Higher	7	6	1	2	6
Degree	9	1	0	0	7
Other	21	11	5	0	24
<i>Unweighted bases</i>	183	272	205	189	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, 1 in 16 construction workers in the North West believes they would benefit from some form of training in basic skills (6% cf. 10% in 2015 and 17% in 2012). This is a smaller proportion to the UK 2018/19 average (11%).

In terms of the type of training required there is an almost even split across reading, writing, speaking English, and maths, as Figure 31 summarises.

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

Base: All respondents

	NW 2018/19	NW 2015	NW 2012	NW 2007	UK 2018/19
	%	%	%	%	%
ANY	6	10	17	15	11
Reading	3	5	10	11	5
Writing	2	3	8	11	5
Speaking English	1	4	8	8	6
Maths	4	5	7	9	5
<i>Unweighted bases</i>	<i>282</i>	<i>435</i>	<i>442</i>	<i>342</i>	<i>4048</i>

Q37

A number of specific sub-groups of construction workers are more likely to believe they would benefit from some training in basic skills:

- Workers aged 16-19* (25% cf. 2% aged 45+)
- Those who have worked in the industry for less than a year* (27%)
- Those employed on a temporary basis (11%)
- Bricklayers (10%) and labourers/general operatives (12%). (* Caution: small sample bases.)



Current study for additional construction qualifications

Overall, 18% of all construction workers in the North West are currently working towards a formal qualification relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 14% in 2015, 12% in 2012 and a UK average in 2018/19 of 15%.

As in previous surveys, the likelihood that workers are currently working towards qualifications is higher amongst the youngest workers (75% of 16 to 19-year olds) and amongst those who have worked within the construction industry for less than a year (53%). Workers employed directly (25%) are also more likely than those who are self-employed (11%) or working through an agency (0%) to be currently working towards a qualification. Of those who have no qualifications, 18% are currently working towards one. Figure 32 summarises these findings.

Figure 32: Proportion working towards additional construction qualifications

Base: All respondents *caution: small sample base

		NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
Total (282)		18	14	12	17	15
Age	16 to 19 years (16)	75	72	58	61	55
	20 to 24 years (30)	23	27	28	31	24
	25 to 44 years (143)	17	8	7	10	14
	45+ years (93)	9	5			6
Length of time in construction	<1 year* (15)	53	52	29	43	38
	1 to 2 years* (16)	50	40	61	44	31
	2 to 5 years (52)	23	30	34	31	25
	5+ years (199)	12	7	7	9	9
Contract type	Employed directly (157)	25	18	N/A	N/A	20
	Self- employed (111)	11	6	N/A	N/A	9
	Agency* (12)	0	25	N/A	N/A	11
Highest qualification level	None (61)	18	16	N/A	N/A	16
	Level 1* (10)	20	42	N/A	N/A	27
	Level 2 (76)	13	14	N/A	N/A	12
	Level 3 (47)	23	5	N/A	N/A	14
	Level 4+ (23)	30	24	N/A	N/A	21

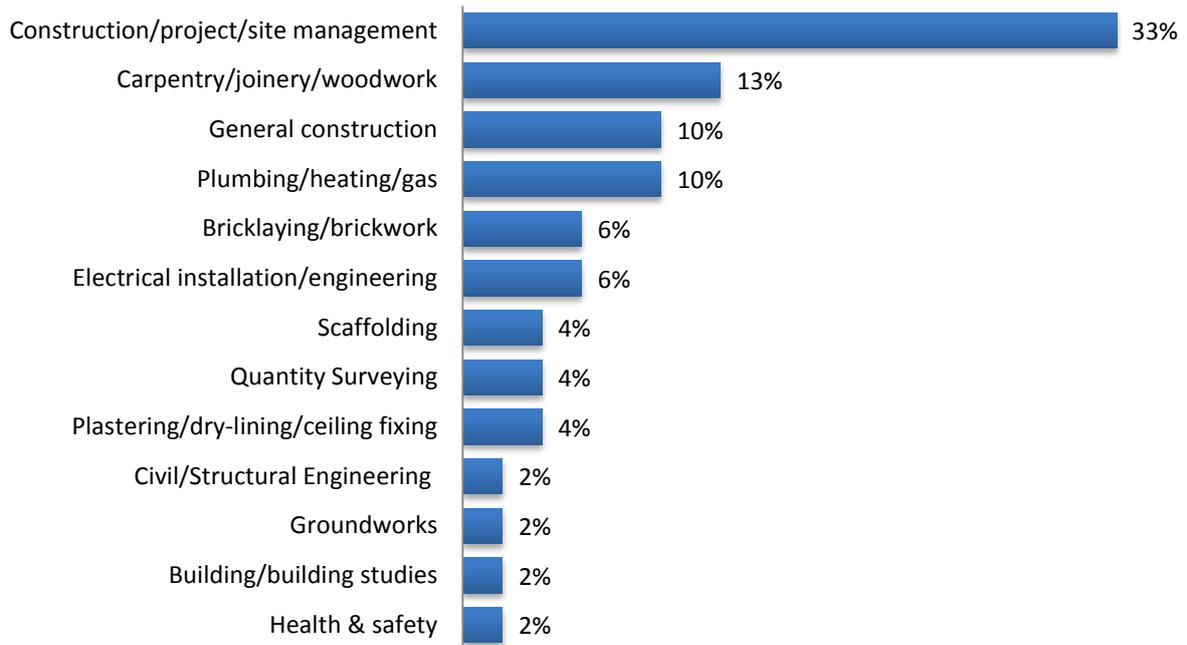
Unweighted bases for 2018/19 North West in parentheses

Q18



Of those who are currently studying for a qualification, the most popular type of qualification is an NVQ/SVQ (40%). In terms of the subject of the qualifications being worked towards, construction/project/site management (33%), followed by carpentry/joinery/woodwork (13%), general construction (10%), and plumbing/heating/gas (10%) are most popular, as Figure 33 illustrates.

Figure 33: Subject of qualification being worked towards
Base: Where working towards a qualification



Unweighted base = 52 Q19



Supervisory and managerial qualifications and training

As reported earlier, more than a third of all construction workers in the North West perform a supervisory or management role at their site (37%). Amongst those who do not currently perform supervisory/management roles, around 1 in 4 want to become a supervisor or manager in the future but have not done it before (27%) and a further 3% want to be a supervisor/manager and have done it before. Around a quarter of all workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (27%), while more than two-fifths are certain that they do not want to be (43%).

The likelihood that workers want to be supervisors/managers also diminishes amongst those that have worked in the industry for at least 5 years, with 56% of those having worked in construction for 5+ years not wishing to be supervisors/managers, compared with a North West average of 43%. Analysis by contract type reveals that those who are currently self-employed or work for an agency are less likely than those employed directly to want to be a supervisor/manager but have not done it before (22%, 10% and 35% respectively).

Figure 34: Whether those who are not currently supervisors want to be one in the future

*Base: Where do not perform supervisor/management roles on site *caution: small sample base*

		Unweighted bases	Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
North West		173	27	3	43	27
UK		2824	24	6	51	20
Age	16 to 19 years	15*	47	0	20	33
	20 to 24 years	22	45	0	14	41
	25 to 44 years	84	32	2	37	29
	45+ years	52	6	6	73	15
Length of time inc construction	<1 year	13*	46	0	15	38
	1 to 2 years	11*	18	0	36	45
	3 to 4 years	41	41	2	22	34
	5+ years	108	20	4	56	20
Contract type	Employed directly	74	35	3	34	28
	Self-employed	89	22	3	49	25
	Agency	10*	10	0	60	30
Highest qualification level	No Qualifications	54	30	0	50	20
	Level 1	8*	38	0	25	38
	Level 2	55	27	5	29	38
	Level 3	27	30	0	48	22
	Level 4+	3*	67	0	33	0



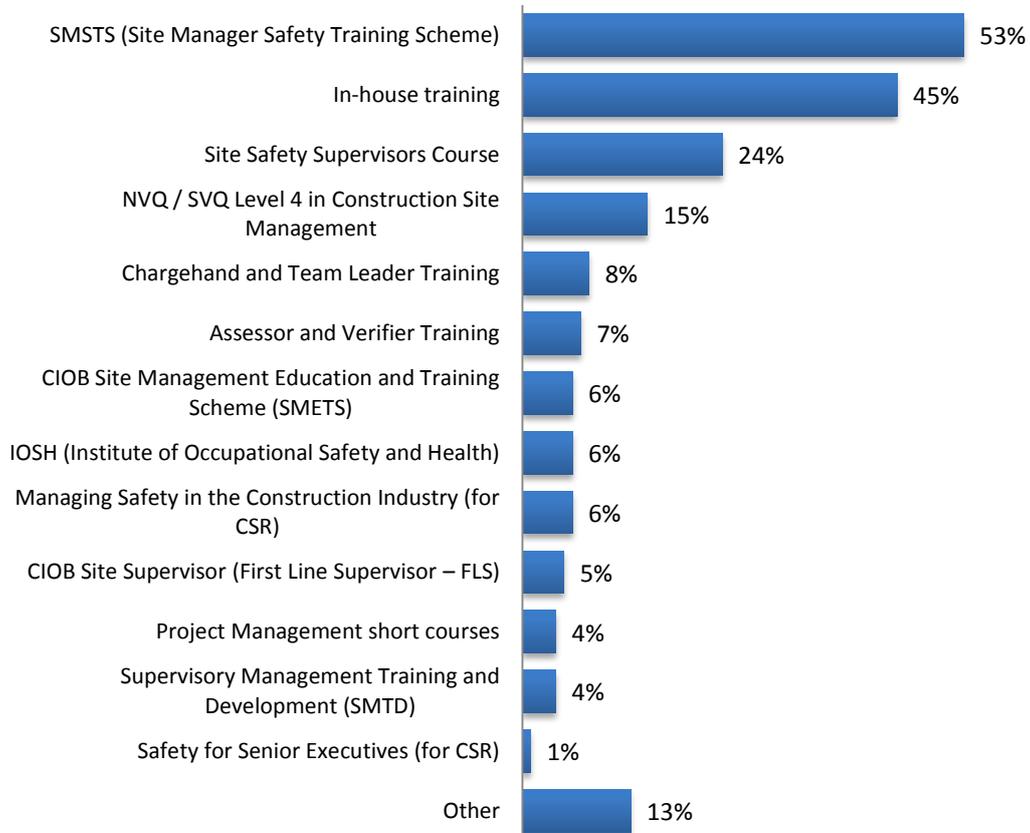
Two in five construction workers in the North West (39%; 34% across the UK) and four-fifths of those who have had some form of supervisory or management responsibilities (83% cf. 64% in 2015, 55% in 2012 and 81% across the UK in 2018/19) have received any formal training designed to improve managerial or supervisory knowledge or skills.

The proportion that has undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years than those that have worked in the sector for less time (46%, compared with 22%). Construction workers employed directly are twice as likely as agency workers to have received formal training in this area (51%, compared with 25%). Nearly all site managers in the sample (98%) have received formal training designed to improve managerial or supervisory knowledge or skills.

In terms of the types of supervisory/managerial training undertaken, the proportions mentioning each type are summarised in Figure 35. SMSTS is most frequently mentioned (53%), with just under half of those that have received training mentioning in-house training (45%) and a quarter receiving Site Safety Supervisors Courses (24%). These three were also the most frequently mentioned in 2015 and 2012.

Figure 35: Types of managerial/supervisory training undertaken

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



Unweighted base = 109 Q11



Overall skill levels

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

As in previous surveys, the vast majority of construction workers in the North West (99%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

Just under a fifth of the workforce (17%) holds a skill card/certificate but has no other construction qualification. This is lower than in 2015 (25%) and considerably lower than in 2012 (52%).

Figure 36: Qualification status summary

Base: All respondents

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	99	99	99	90	99
Holds a formal construction qualification or a skills card/certificate	99	98	98	86	98
Holds a skills card/certificate	98	97	98	75	97
Holds a skills card/certification but no other qualification	17	25	52	31	22
Working towards a qualification	18	14	12	17	15
<i>Unweighted bases</i>	282	435	442	342	4048



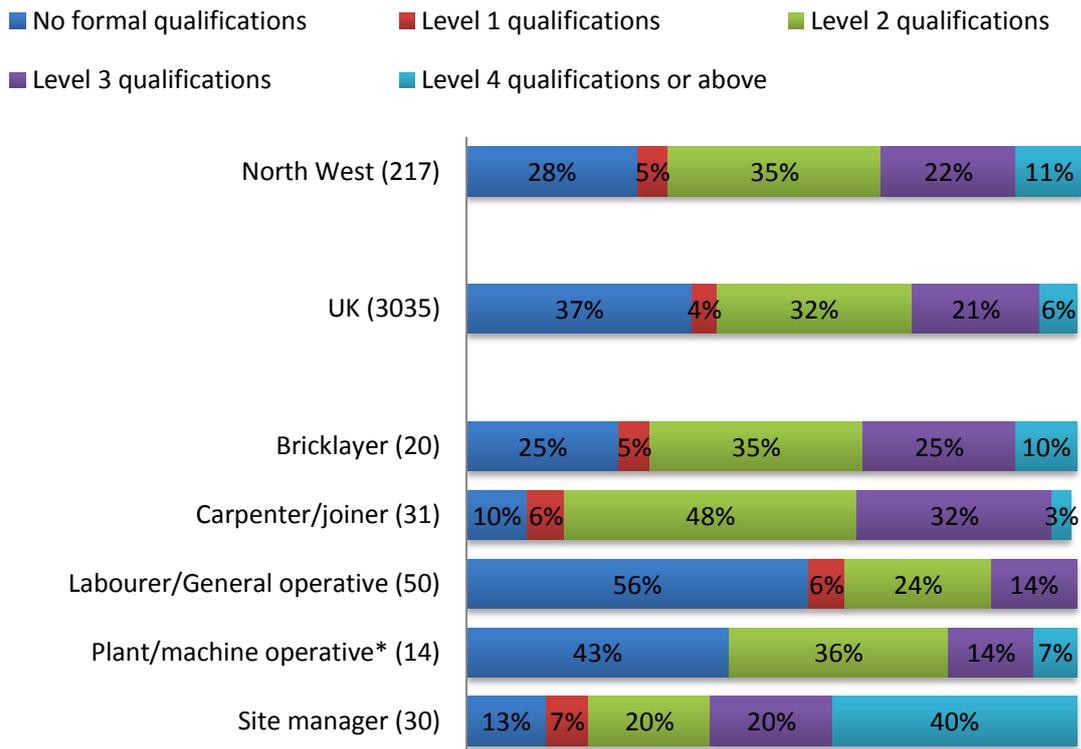
Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. Figure 37 summarises construction workers' highest level of qualification, overall and by occupation, based on where the information provided enabled a level to be assigned (23% of all North West construction workers did not provide sufficient information).

Overall, more than half of construction workers in the North West providing a response have qualifications equivalent to Level 2 or above (67%, cf. 67% in 2015, 62% in 2012 & 59% across the UK in 2018/19). A third hold qualifications equivalent to Level 3 or above (32% cf. 35% in 2015 and 24% in 2012).

By occupation, site managers (providing a response) are most likely to hold the highest level of qualifications; two-fifths of site managers have qualifications at Level 4 or above (40%). Carpenters/joiners (32%) and bricklayers (25%) are more likely than other occupations to hold qualifications equivalent to Level 3 (with 3% and 10% respectively holding Level 4+ qualifications).

Figure 37: Current qualification level, by occupation

Base: All respondents who provided a valid response



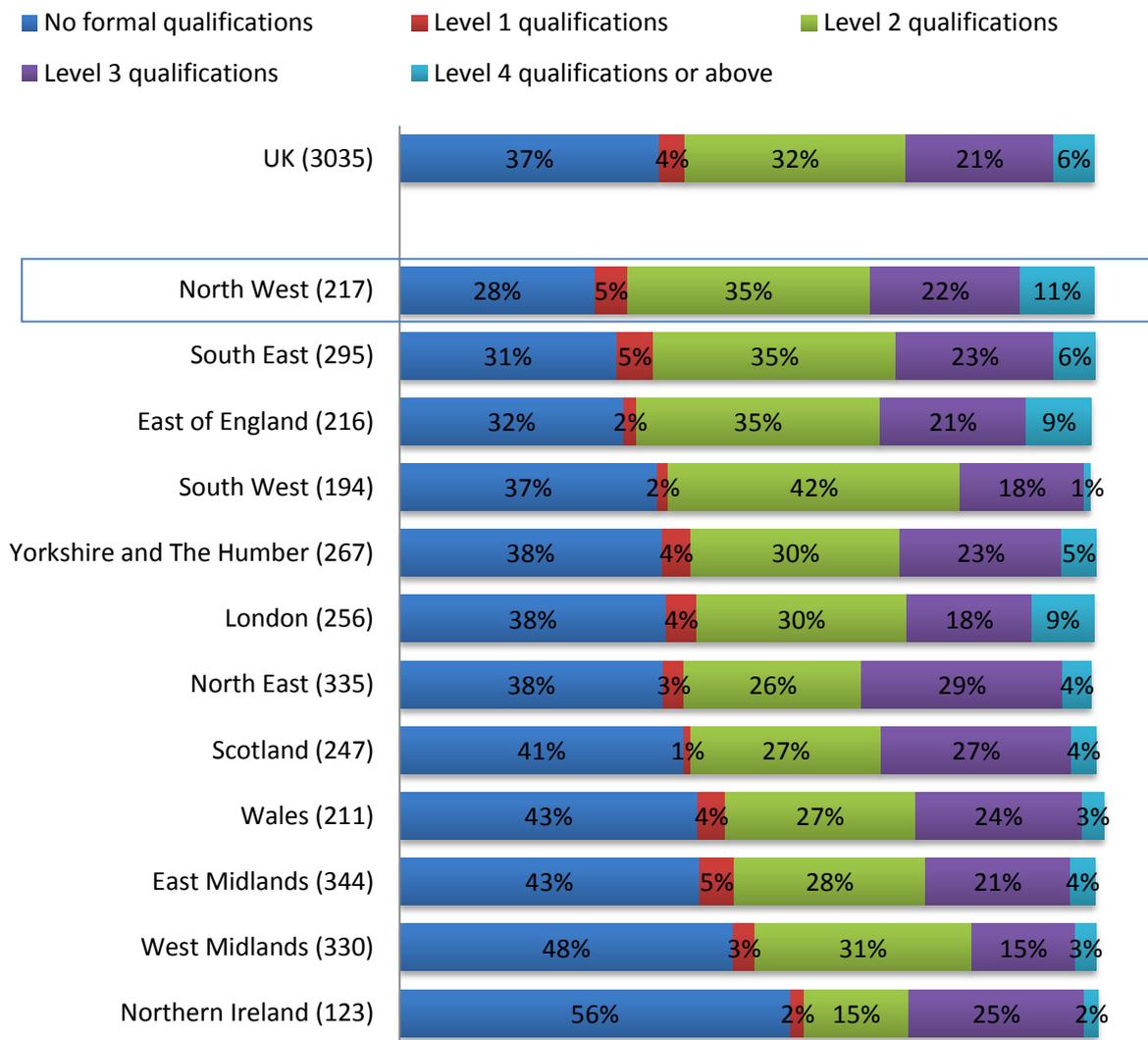
Unweighted bases in parentheses Q15/Q16



Analysis by region/nation reveals that while the proportions that hold qualifications at Level 1 or at Level 4 and above are generally quite similar, the proportions that have Level 2 or 3 qualifications and no qualifications vary quite considerably. These variances are summarised in Figure 38, which highlights that the construction workforce in the North West is above average across the UK. Its workers are less likely not to hold any formal qualifications (28% cf. 37%) and more likely to hold level 4+ qualifications (11% cf. 6%).

Figure 38: Current qualification level, by region/nation

Base: All respondents who provided a valid response



Unweighted bases in parentheses

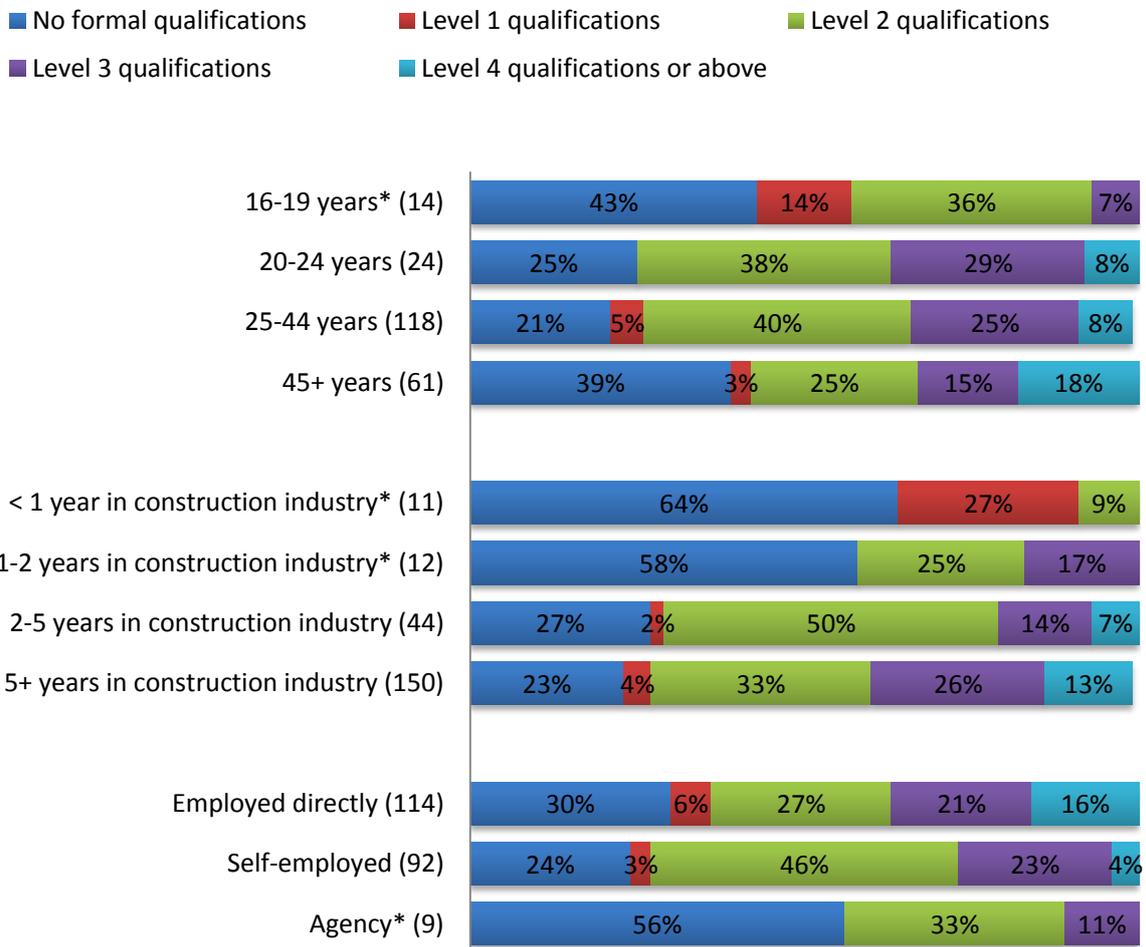


Looking at other sub-groups of construction workers, workers that have worked in construction for 5+ years are more likely than those having spent less time in the industry to have qualifications at Level 3 or above (39%, compared with 16% that have less than 5 years experience).

In terms of contract type, workers employed directly by a company are more likely to have higher level qualifications, compared with workers who are self-employed; more than 1 in 3 workers employed directly have qualifications equivalent to Level 3 or above (37%), compared with around 1 in 4 self-employed construction workers (27%). Figure 39 illustrates these variances and levels of qualifications held by other key variables.

Figure 39: Current qualification level, by other key variables

Base: All respondents who provided a valid response * caution: small sample base



Unweighted bases in parentheses Q15/Q16



Geographic mobility

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

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

Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. Within the North West, unlike the UK as a whole, the most likely reason for working in the region is because they grew up/always lived there (60%), although the fact that their employer sent them there is also mentioned by nearly half of workers (46%) which is below the UK average (51%).

Figure 40: Reasons for choosing to work in current location

Base: All respondents

	NW 2018/19 %	NW 2015 %	UK 2018/19 %		NW 2012 %
You grew up here/have always lived here	60	69	43	Employer sent me	41
Employer sent you here	46	24	51	Family	55
Family reasons	7	6	5		
Came to the area to take up this or another job	5	4	3	More regular opportunities	2
There are more jobs available in this area	3	8	5	More jobs here	5
Construction work is better paid in this area	1	2	3	Better paid jobs	2
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	1	<0.5	2	Prefer living here	7
Better promotional prospects in this area	<0.5	0	1	More chance of promotion	-
<i>Unweighted bases</i>	282	435	4048		442

Q28

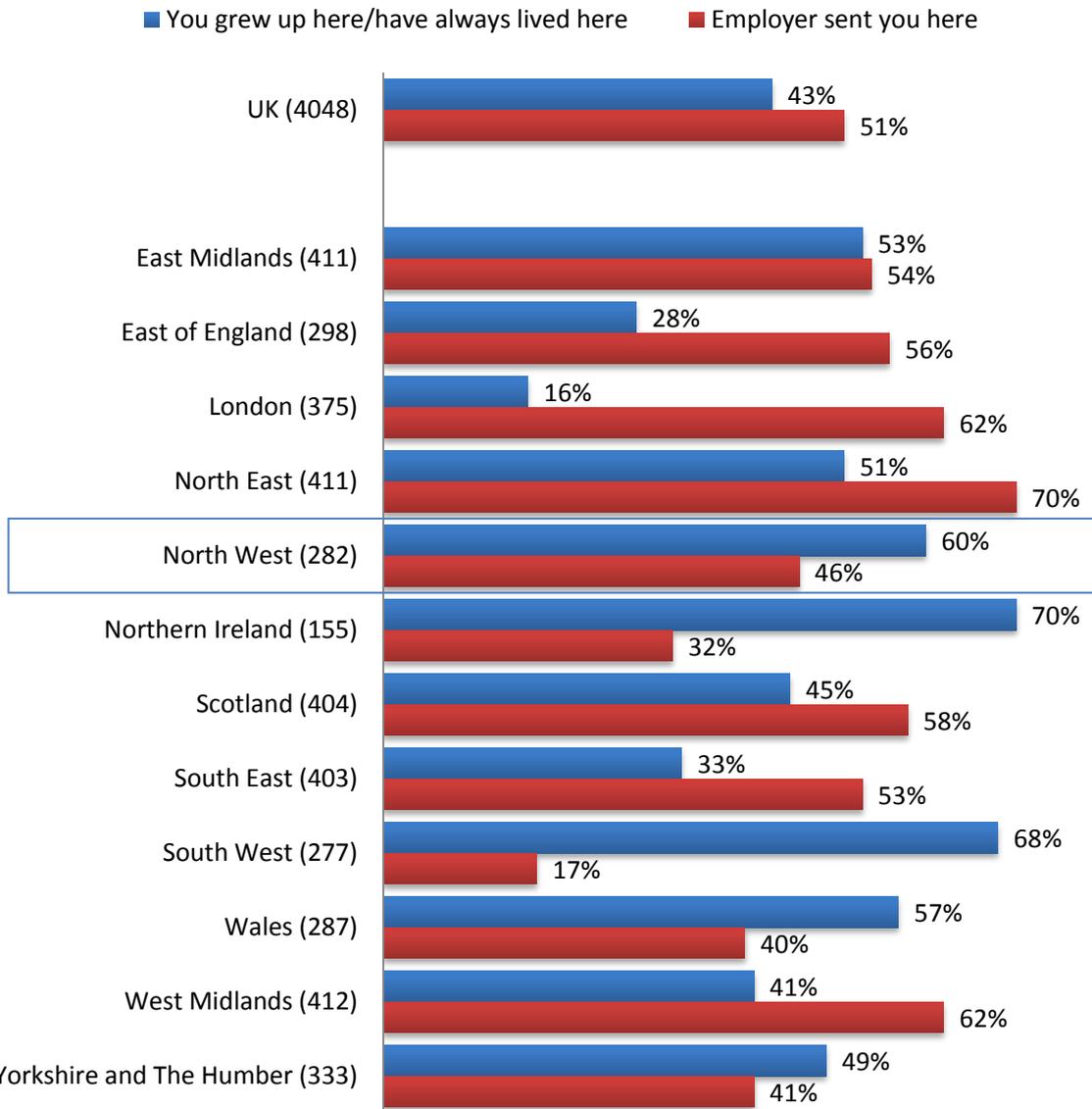


Younger workers are much more likely than older workers to say that their employers sent them to their current location (69% of 16 to 19-year olds compared to 46% of 45+).

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

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

Base: All respondents



Unweighted bases in parentheses Q28



Just over half of all workers in the North West have worked within the region for their entire construction career (55%), compared with a lower proportion in 2015 (48%) and 2012 (30%). With a further 33% that have remained in this region most of the time, the majority of all workers have remained in the North West for all or most of the time (87%).

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

Base: All respondents

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
All of your time	55	48	30	34	44
Most of it	33	43	47	48	33
Around half your time	7	5	11	9	9
A small proportion of your time	4	4	7	5	10
Only on this job (this is the first site you've been to in this region/nation)	2	<0.5	2	2	2
Don't know	0	1	2	2	1
<i>Unweighted bases</i>	282	435	442	342	4048

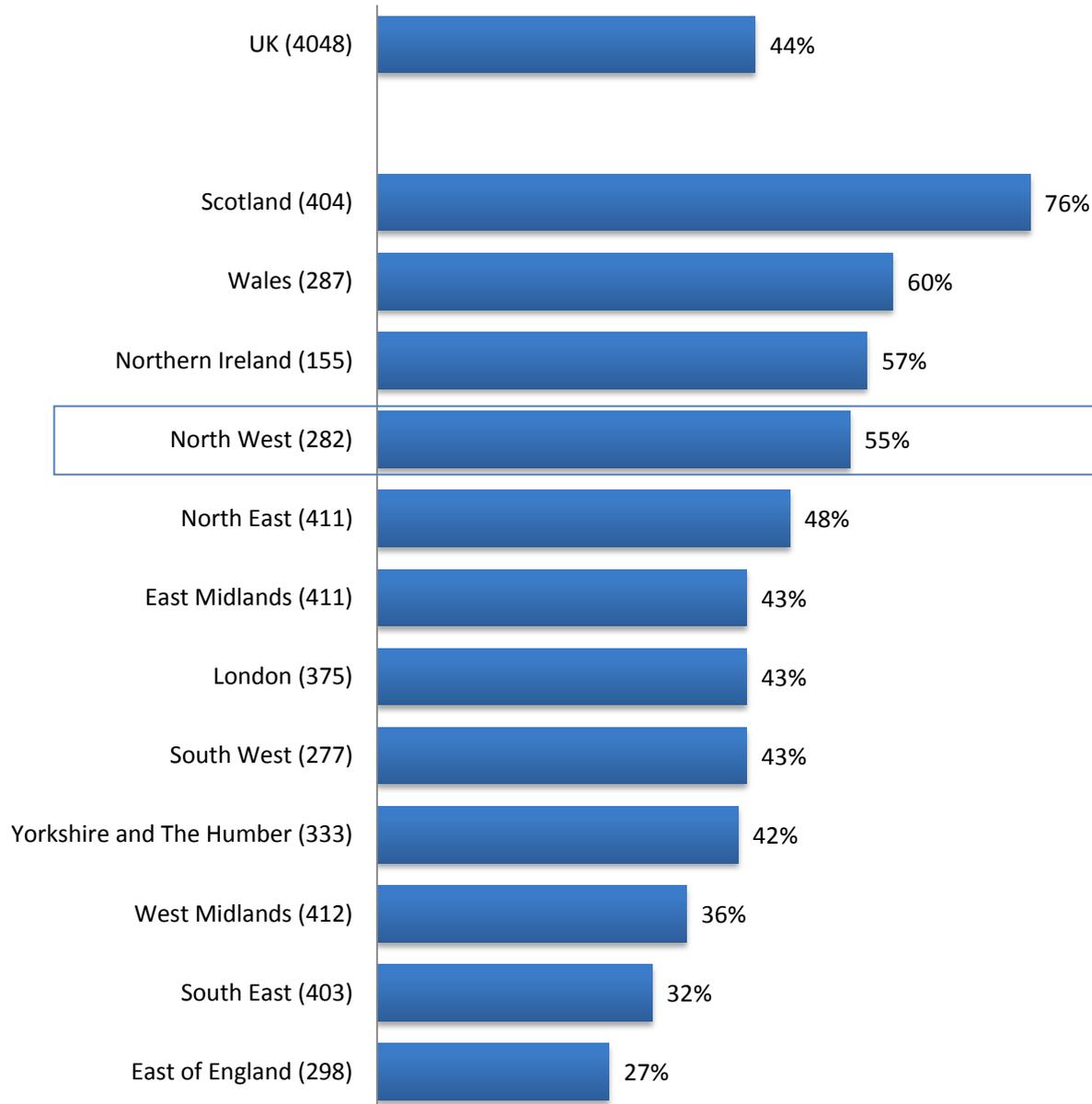
Q26/Q27



The proportion of construction workers in the North West that have spent all of their time in the region is higher amongst younger workers (75% of 16 to 19 year olds and 77% of 20 to 24 year olds) and similarly high amongst those that have worked in the construction industry for the shortest period of time (77% of those that have worked in the industry for less than five years compared to 45% of those that have worked in the industry for more than 5 years).

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

Base: All respondents



Unweighted bases in parentheses Q26



The proportion of workers that reported their employer operates (takes on construction contracts) only within particular regions/nations, nationwide or internationally is shown in Figure 44. In the North West, over two-thirds (69%) indicate their employer operates nationwide, with three-tenths (29%) stating that their employer operates in particular parts of the UK including the North West, with a small minority (less than 0.5%) unsure.

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

Base: All respondents

*denotes less than 0.5%

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

Q25



Region/nation worked in before current site

Thinking about the last construction site they worked on before this one, in the majority of cases, workers' last sites were in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 45 illustrates. As in 2015, construction workers in the North West are amongst those most likely to state that their last site was in the same region (91%), and the proportion is higher than in 2015 (89%). Workers in Scotland (98%) and Northern Ireland (93%) are most likely to say that this is the case, while those in the East of England (52%) and the South East (62%) are least likely.

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

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

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

Q32



Worker origins

Workers were asked which region/nation they were living in just before they got their first job in construction in the UK. Overall, almost nine-tenths of all construction workers in the North West were living in the North West when they started their construction career (87% cf. 91% in 2015). This compares with other regions/nations where the proportion is significantly higher (Scotland at 96%; Northern Ireland at 95%) and those where the proportion is significantly lower (East of England at 44%; South East at 51%). Figure 46 summarises this data.

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

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

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

Q40



Thinking next about where workers studied for their first construction qualification, Figure 47 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that more than four-fifths of construction workers in the North West (85%) achieved their first qualification there.

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

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

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

Q17



Travel to site

Relative locations of current workplace to home

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

One in sixteen construction workers in the North West are travelling into the region for work from another region/nation in which their current residence is based (6%) and this is a lower proportion than in previous surveys (12% in 2015 and 13% in 2012).

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

Base: All respondents who provided a valid response

	2018/19			2015		
	% from same region/nation	% from different region/nation	% from neighbouring region/nation	% from same region/nation	% from different region/nation	% from neighbouring region/nation
Northern Ireland (145)	100	0	-	99	1	-
Scotland (196)	100	0	0	96	4	0
Wales (258)	98	2	2	93	7	5
North East (335)	96	4	4	97	3	1
North West (257)	94	6	6	88	12	12
South West (243)	94	6	6	85	15	11
East Midlands (309)	90	10	10	74	26	23
Yorkshire and the Humber (290)	88	12	9	86	14	14
West Midlands (308)	80	20	19	82	18	16
London (341)	63	37	32	71	29	25
East of England (270)	60	40	36	63	37	27
South East (362)	55	45	42	58	42	38
<i>Unweighted bases for 2018/19 in parentheses</i>						

Q52/Q54



The extent to which construction workers live in the same region/nation in which they work is further illustrated in Figure 49. More than nine in ten construction workers in the North West are currently living in the same region as the site they work on (94%), which compares with 88% in 2015. The majority of those that are travelling from a different region are living in Yorkshire and the Humber (5%), a neighbouring region.

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

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

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

Q52/Q54

Furthest distance worked in last 12 months

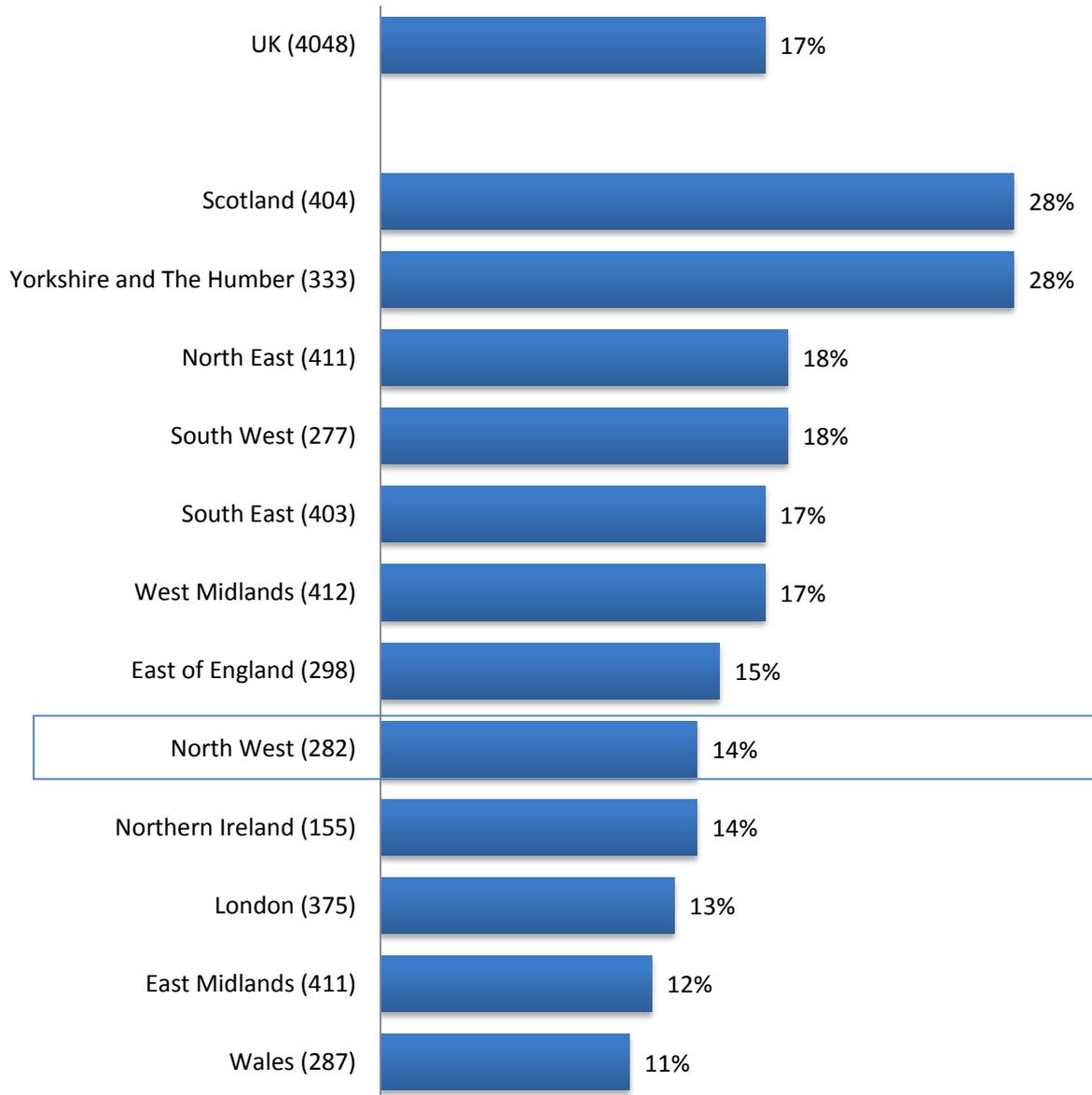
All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within the North West, around 1 in 3 construction workers have worked no more than 20 miles away (29%) and nearly a further third have worked between 21 and 50 miles away (33%). The average maximum distances travelled to work by North West construction workers in 2018/19 were shorter than in 2015 when 12% had worked no more than 20 miles from their home, and 35% had never travelled further than between 21 and 50 miles to work. This leaves two-fifths of workers that have worked more than 50 miles away from their permanent home (38%), with 1 in 4 that have worked between 51 and 100 miles away (24%) and 1 in 8 that have worked more than 100 miles away (14%).

Compared with workers in other regions/nations, workers based in the North West are amongst the least likely (14%) to have travelled more than 100 miles from their permanent home to work in the last 12 months.



Figure 50: Proportion of workers that have travelled more than 100 miles from their permanent home to work, in the last 12 months, by region/nation

Base: All respondents



Unweighted bases in parentheses Q29



Use of temporary accommodation

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

Figure 51: Percentage of workers in temporary accommodation

Base: All respondents

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

Q41/Q42

Journey distance to work

Within the North West, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 13 miles, less than the average of 21 miles reported in 2015 and much less than the average of 33 miles reported in 2012. The North West mean compares to a mean of 18 miles across the UK.

4 in 10 (46%) travelled less than 10 miles from their current residence to the site they work, whilst 30% travelled between 10 and 19 miles, 23% travelled between 20 and 49 miles, 1% travelled between 50 and 99 miles. None of the sample travelled more than 100 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (10% of all construction workers in the North West) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 4% expect to work for another week or so, or less; 0% expect another month; 7% between a month and 3 months; 11% between 3 and 6 months; 7% between 6 months and a year; and 14% expect to still be working for their current company/agency in more than a years' time. Over half of the



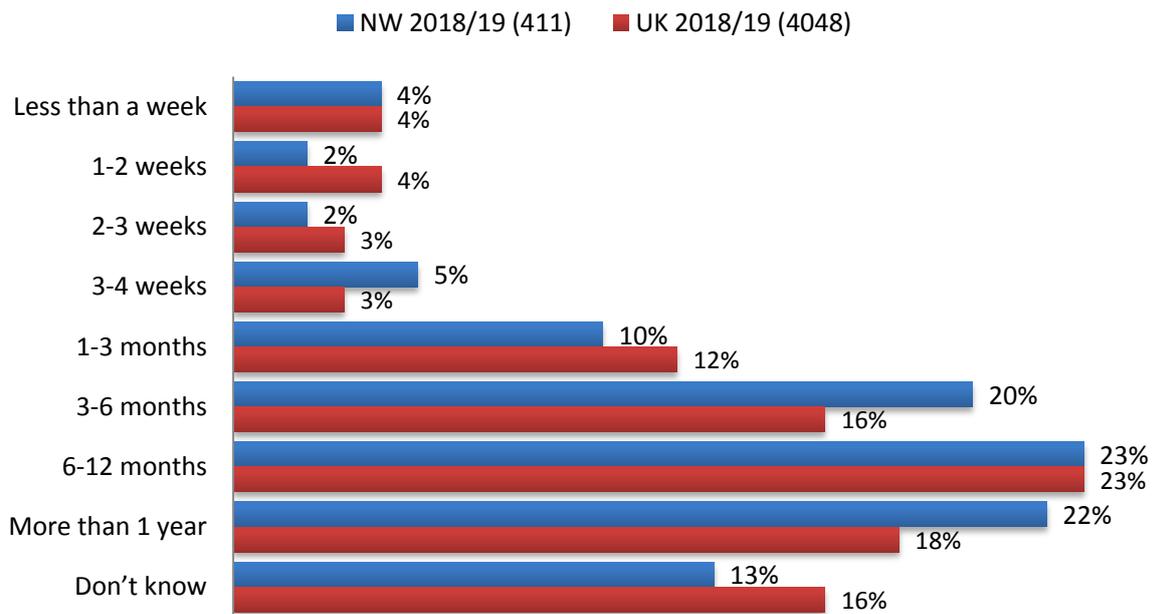
temporary workers in the region did not know how much longer they could expect to be working for their current company/agency (57%; 38% across the UK).

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 7 construction workers in the North West (13% cf. 21% in 2015 and 33% in 2012) do not expect to work on that site for more than a month, including 4% that only expect to be there for a week or less. Half anticipate being on site for more than a month, but less than a year (52%), while a fifth expect to stay on that site for a year or longer (22%), which is similar compared with 2015 (23%) when a significant increase compared with 2012 was reported (6%). It compares with a UK average in 2018/19 of 18%. However, in more than an eighth of cases (13% cf. 27% in 2015 and 14% in 2012), workers did not know how much longer they could expect to be on site, indicating that a significant minority of construction workers are living with a certain amount of uncertainty and insecurity.

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

Base: All respondents



Unweighted bases in parentheses
Q24

The youngest workers, aged 16-19 are more likely to be unsure of how much longer they can expect to work for (25% don't know). Amongst the various trades/job roles, site managers are more likely to indicate that they expect to work at that site for more than a year (44%); whilst labourers/general operatives (19%), bricklayers (10%) and carpenters/joiners (9%) are least likely to indicate that this is the case.



Expected next site location

Nearly nine-tenths of all construction workers in the North West are confident that, when they finish this job, they will get a job that allows them to travel from their permanent home to work on a daily basis, and this is a higher proportion than in previous surveys (86% cf. 79% in 2015 and 65% in 2012). The remaining fifth of workers are sure that this will not be the case (3%); that it depends where the work is (8%) or that they don't know (2%).

Construction workers in the North West are above the UK average in this respect (84%).

Construction workers who have worked in construction for the longest period of time are as likely to be confident of this (86% of those who have worked in the industry for 5+ years, cf. 87% of those who have worked in construction for less than a year). By trade/occupation, bricklayers are most confident (97%).

Workers that are certain that their next job will not be within commuting distance of their permanent home were asked to indicate which region/nation they expect to be working in next. The following figure summarises their responses by region/nation (although the base sizes within each region/nation are very small, so some caution is needed). This gives an indication of the likely pattern of movement between regions/nations. Under half of construction workers in the North West (44%) that do not expect to be able to commute daily to their next job expect to remain in the region for their next job. A third believe their next site will be in Scotland (33%), while 1 in 9 believe it will be in the South West (11%).

Figure 53: Expected location of next site/job

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

* denotes less than 0.5%

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

Q31



Sub-sector and sector mobility

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

Sub-sector mobility

All workers were asked which (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, the vast majority of construction workers in the North West have worked on new housing (88% cf. 93% in 2015). Reversing the trend from 2015, there is an upward trend in the proportions of construction workers that have been working on other types of projects.

Overall, less than a third of all construction workers have only worked on one project type (28%), a decrease on 2015 (43%), and this suggests decreased stability in the sector in terms of the sub-sectors in which work is available.

Figure 54: Type of projects spent significant periods on

Base: All respondents

	NW 2018/19 %	NW 2015 %	NW 2012 %	NW 2007 %	UK 2018/19 %
New housing	88	93	72	73	79
Housing repair and maintenance including extensions/loft conversions	49	42	70	60	46
Commercial work such as shops, office, pubs etc	47	36	64	48	51
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	41	35	58	41	45
Public non-housing work such as schools, sports facilities, landscaping	48	37	55	32	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	26	20	42	22	31
ONE TYPE ONLY	28	43	21	30	30
TWO TYPES	21	16	9	19	16
THREE TYPES	16	9	14	17	14
FOUR TYPES	9	8	15	13	12
FIVE TYPES	11	15	17	12	13
SIX TYPES	15	10	22	7	14
<i>Unweighted bases</i>	282	435	442	342	4048

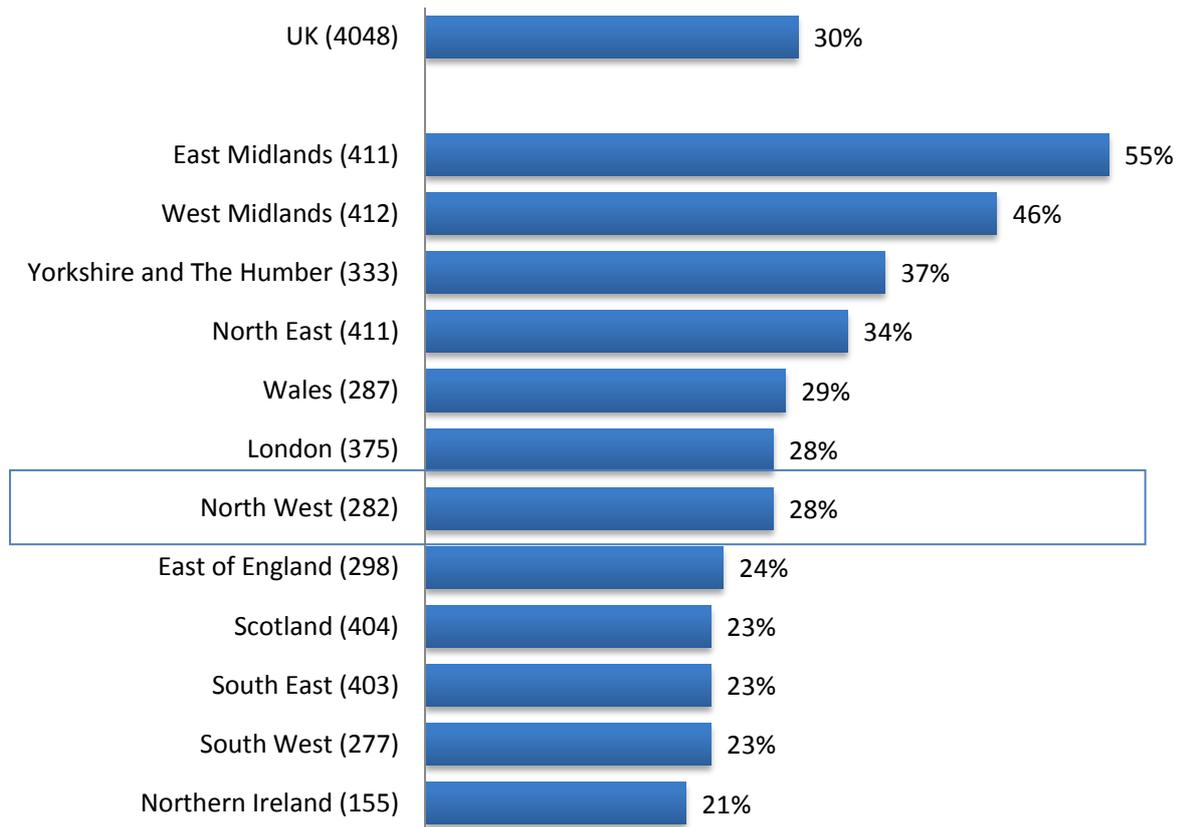
Q3/Q4



The number of project types worked on varies significantly by region/nation, as Figure 55 illustrates. The North West is slightly less likely than average to have construction workers who have only worked on one project type (28% cf. 30% in the UK).

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

Base: All respondents



Unweighted bases in parentheses Q4



The likelihood that workers have worked only on one project type declines as age increases, (from 63% of 16 to 19-year olds to 23% of 45+ year olds). By current trade/occupation, the proportion is lowest amongst plant/machine operatives (17%) and highest among labourers/general operatives (35%).

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

Base: All respondents *Caution: Small sample base

	Unweighted bases	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Bricklayers	29	34	10	17	3	17	17
Carpenters/joiners	32	28	34	9	9	13	6
Labourers/general operatives	52	35	23	12	10	8	12
Plant/machine operatives	23	17	13	35	9	13	13
Site manager	48	27	25	15	10	6	17

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, three-quarters (76%) felt it was very likely that they would still want to, which is a higher proportion than the UK average (74%). This included, within the North West, around half of construction workers who say they definitely will be (48%) and around a quarter who think it is very likely (28%). In addition, 1 in 8 think it's quite likely (13%), 2% consider it unlikely, just 1% say they definitely won't be, and a further 4% hope to be retired by then, while 5% don't know.

Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years' time increases to 11% of construction workers aged 45 and over and 50% of those aged 60 and over. The proportion that feels they either definitely would want to still be working in construction or that it is very likely is highest among those aged 16-19 (81%).



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

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

	NW 2018/19 %	UK 2018/9 %	Age			
			16 to 19 * %	20 to 24 %	25 to 44 %	45+ %
Definitely will be	48	48	44	47	46	52
Very likely	28	26	38	27	31	20
Quite likely	13	11	19	10	15	10
Quite unlikely	1	2	0	3	0	2
Very unlikely	1	2	0	3	0	1
Definitely will not be	1	1	0	0	1	1
Hope to be retired	4	4	0	0	0	11
Don't know	5	5	0	10	6	3
<i>Unweighted bases</i>	282	4048	16*	30	143	93

Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 48% believe they will definitely want to be working in the construction sector, 28% believe it is very likely they will want to be working in the construction sector, and 14% believe it is quite likely they will want to be working in the construction sector. Only 3% think on any level that they will not want to be working in the construction sector in 5 years' time which is less than in 2012 (7% in 2015 and 15% in 2012).

Overall, as above, 3% of all 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 work outside of construction might be less physical (57%, 4 respondents), while more than two-fifths thought they might find more interesting work outside of construction (or that they would be bored of what they are doing now and need a change) (43%, 3 respondents). Other reasons, each cited by 1 respondent, included expectations of better pay outside of construction and better use of skills/abilities.



The North West 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 but this is not as strongly reflected among the North West workforce. Within the North West there has been little change in the proportion of workers employed directly by companies, from 57% in 2015 to 56% in 2018/19 and little change in the proportion that are self-employed (39% in 2018/19 cf. 40% in 2015). Fewer workers in the North West than UK-wide are employed on a temporary basis in 2018/19 (10%, compared to 28%).

Workers in the region, on average, travel shorter distances to their current site than the UK average and the distance they travel has decreased since 2015 from 23 miles to 13 miles. Across the regions, they are amongst those least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (14%, compared with a UK average of 17%).

North West construction workers are more likely to report that they work at their current site because they have always lived in that area or their employer sent them there (60% and 46% respectively). They are more likely than the UK average to report being long term residents of the area in which they currently work and there is less recent mobility among North West workers compared with the UK as a whole in this respect. This is further highlighted by the fact that a similar higher proportion of North West workers in 2018/19 as in 2015 were also based in the region for their last job (93%, compared with 91% in 2015).

Longer term, over the course of careers in construction, North West workers compared with those in other regions, have a higher propensity to have remained in the same region in which they started their careers (87%, compared with 96% in Scotland and 44% in the East of England) or in which they obtained their first qualification/training in construction (85%, compared with 96% in Scotland and 41% in the South East).

There is some evidence of more uncertainty with regard to the duration of temporary employment within the region than average across the UK; 57% do not know how long they expect to continue with their current employer/agency, compared with a UK average of 38%.

Compared with 2015, North West workers were more likely to be confident that their next job will be at a location that will allow them to travel to work from their permanent home on a daily basis (86%, compared with 79%).

North West construction workers are more likely to have worked in more than one trade than they were in 2015 (39%, compared to 31% in 2015) and less likely to have worked in just one project area (28%, compared to 43%). In line with the UK trend, there appears to have been a widening in the range of experience in the region.

In terms of skills and qualifications, it is encouraging to note that the vast majority of North West construction workers continue to hold some form of skill card or certificate. This proportion is similar to the UK average (98%, compared with 97%). There also high levels of qualified workers in the region (78%) compared with the UK (71%) and a similar proportion



of workers in the North West to the UK average are working towards a construction qualification (18% cf. 15% across the UK).

One in sixteen construction workers in the North West in 2018/19 believe they would benefit from training in basic skills (6%) which is a smaller proportion to previous years (10% in 2015 and 17% in 2012).



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