

# **Workforce Mobility and Skills in the UK Construction Sector**

## **North East Report**

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# 1 Background, Objectives and Methodology

## 1.1 Introduction

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

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

Where available, results from the 2007 survey have been compared with those from similar previous research conducted by IFF Research in 2004<sup>1</sup>.

## 1.2 Key objectives of the research

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

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

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

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

## **1.3 Methodology**

The key elements of the research approach were as follows:

### **1.3.1 Desk research**

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

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

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

### **1.3.2 Sampling**

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

From the projects identified as being eligible for inclusion in the survey (the steps taken to select eligible records from Glenigan are detailed in the technical report), a stratified random sample of 99 postcode districts (e.g.NR 2) was drawn to produce a representative sample of locations across the UK. For each selected district six eligible projects were identified. Projects were selected on the basis of value, 35% of sites with a value of less than £1million and 65% of sites with a value of more than £1million. In 2004, the survey focused on sites valued at over £1 million and the sampling process aimed to ensure a mix of sites by stage of development (first six months, midway, last six months). In 2007 the requirement was to also sample sites under £1 million, so this criterion needed to be reconsidered in that light. The 2004 definition of stage of development clearly assumed quite large, lengthy projects, appropriate for sites with a minimum value of £1 million. With the introduction of smaller sites, some would be completely finished in six months. Therefore it was decided that an appropriate alternative definition would be to select according to value.

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

### **1.3.3 Telephone survey**

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

### **1.3.4 Site visits**

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

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

### **1.3.5 Challenges**

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

## **1.4 Details of sites covered in the research**

The survey results presented in this report are based on fieldwork conducted in the North East from February to July 2007. This consisted of a total of 427 face-to-face interviews with site based workers obtained across 32 sites.

At the analysis stage, weighting was applied to the data to ensure each nation/region was represented in its correct proportions based on the relative size of the construction workforce. Labour Force Survey figures were used for UK regions/nations, (average profiles from the period October 2006 – June 2007). Unless otherwise stated, with the exception of base totals, the figures in this report are based on weighted data. Weighted, the North East accounted for approximately 4% of the UK/ROI workforce.

Figures from the site managers interviewed at the telephone fieldwork stage indicated that there were 974 workers across the 32 sites. Using this figure it would appear that around 44% of the potential workforce took part in the research, however it should be noted that there were instances where on the day the site was visited many fewer workers were present than indicated by the site manager when first contacted. This was due to number of factors, for example the site may have entered into another phase of the project by the time the interviewer was able to visit the site.

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

## **1.5 Structure of the report**

The report is structured as follows:

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

A separate technical report has been produced.

## **1.6 Notes on tables**

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

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

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

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

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

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

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

## 2 Management Summary

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

The survey results presented in this summary are based on fieldwork conducted in the North East from February to July 2007. This consisted of a total of 427 face-to-face interviews with site based workers obtained across 32 sites.

This summary highlights the key findings for each of the major themes covered. Where available, results from the 2007 survey have been compared with those from similar previous research conducted by IFF Research in 2004<sup>2</sup>.

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

### 2.1 The profile of the workforce

The workforce in the North East had a relatively mature profile. Almost two-fifths (38%) were aged 45 or over compared with around a quarter (26%) of the UK/ROI workforce. Consistent with this older profile the proportion having had more than 20 years experience was higher in the North East (39%) than across the UK and ROI (27%). There were relatively few recent entrants to the industry in the region with just 5% having had no more than a year's experience (compared with 11% of those overall).

The most common occupations within the industry in the North East were bricklayers and labourer/operatives with just over a fifth (22%) working in each of these roles. Both of these groups make up a higher proportion of the North East workforce than is the case for the UK and ROI as a whole where 13% were bricklayers and 17% labourers. As for the overall workforce the proportion of plant/machine operatives rose in the North East (up from 4% to 11%).

Construction workers in the North East were more likely to be employed directly by a company than those in any other region (85% were employed directly compared with 64% of the overall workforce). A tenth were self-employed while 4% worked for an agency.

### 2.2 Qualifications and skills

The proportion that held a skill card or certificate in the North East was 68%, the same as for the UK and ROI as a whole. The rate in growth of ownership since 2004 (when 60% held a card or certificate) was also similar to that for the overall workforce. Younger workers in the North East were more likely to have a skill card or certificate than average, with 70% of 16–

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



24s having one compared with 56% across the UK and ROI. As for the overall workforce, the North East has seen particularly strong growth in the proportion of self-employed workers having one of these qualifications with almost two-thirds (66%) having one in 2007 compared with just under half (48%) in 2004.

The North East was still the region where workers were most likely to hold a qualification relevant to construction other than a skill card or certificate although this proportion (66%) has remained virtually stable since 2004. A particularly high level of self-employed workers in the region held a formal qualification. (80% vs. 54% of the overall workforce).

The shift towards NVQs/SVQs seen for the overall workforce was also seen in the North East where just over half (53%) of those with a qualification had an NVQ or SVQ compared with around a third (34%) in 2004.

Workers in the North East were less likely to have supervisory or managerial duties on site than average (10% vs. 18% across the UK and ROI). Those with supervisory or managerial duties were, though, more likely to have received training designed to improve their skills in this area. Around two-thirds (68%) had received this sort of training compared with just over half (53%) of the UK and ROI workforce. In 2004 only around one in six (17%) had received this sort of training in the North East.

The proportion of the workforce that was working towards a construction qualification (most commonly an NVQ or SVQ) was 13%, slightly lower than for the UK and ROI as a whole (15%). Only three tenths of those working towards a qualification did not already have one (equivalent to 4% of the total workforce in the North East compared with 8% of the UK/ROI workforce). This may be due to the more experienced nature of the North East workforce together with their higher likelihood of already holding a formal qualification other than a skill card or certificate.

The relatively highly qualified and experienced nature of the workforce in the North East was reflected in the fact that nine in 10 of them said that they had all the skills needed for their current job. This compares to around three-quarters (76%) of the overall UK/ROI workforce that felt the same way.

Those in the North East were also a lot less likely than average to feel they needed training in basic skills with just 6% having identified a need (compared with 21% of the overall workforce).

The potential demand for training from those who were looking to change their roles with the construction industry looked to be relatively low in the North East. Just under a tenth (8%) of those in the North East said they would like to change the work they do (compared with 14% of workers across the UK and ROI) although the vast majority of them (91%) said that they would need further training and qualifications for their prospective new role.

The relatively short time that workers are on site is a potential barrier to the uptake and delivery of training. However, workers in the North East show a greater stability than average on this measure. Less than a quarter (23%) said that they will be at their current site for three months or less (compared with 31% of the overall workforce). They are also more likely to

have said they will be at their current site for more than a year (30% vs. 20% of the overall workforce).

### **2.3 Mobility**

The North East was relatively self-sufficient in terms of construction workers with the vast majority (84%) originally from the region (only Northern Ireland had a higher proportion of native workers). The vast majority of the workforce in the North East also had a permanent residence within the region (91%).

Relatively few of those originally from the North East went outside of the region to work with just 16% doing so (compared with 31% of those from the West Midlands, the region that exported the highest proportion of native workers).

The mean number of miles travelled to work (distance from home to work) was 23, virtually the same as the UK and ROI average of 24 miles. Workers in the North East were less likely than average to travel less than five miles to work (14% vs. 24% for the UK/ROI). However, only 7% travelled over 50 miles compared with 10% of the overall workforce.

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

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

#### 3.1 Demographic profile of the sample

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

<b>Table 3.1 Demographic profile of the sample</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
<i>Age: 16–19</i>	<b>7</b>	28	8
20–24	<b>11</b>		16
25–34	<b>19</b>	22	25
35–44	<b>26</b>	18	25
45–54	<b>23</b>	20	16
55+	<b>15</b>	11	10
<i>Ethnicity: White</i>			
	<b>100</b>	99	96
Black	<b>&lt;1</b>	N/A	2
Asian	<b>-</b>	N/A	1
Other	<b>-</b>	N/A	1
<i>Gender: Male</i>			
	<b>100</b>	99	99
Female	<b>&lt;1</b>	1	<1
<i>Base: North East respondents (2007: 427; 2004: 379); Overall workforce (3,877)</i>			

The age profile of construction workers in the North East appears to have changed somewhat between 2004 and 2007, becoming older. Almost two-fifths (38%) of the workforce were 45 or over, compared with less than a third (31%) in 2004. The proportion of younger workers also fell with 16–24s accounting for 18% of the workforce in 2007 compared with 28% in 2004.

The profile was also older than that for the UK and ROI. Around a quarter (26%) of the overall workforce was 45 or over compared with just under two-fifths (38%) of those in the North East.

It was still the case that the workforce was overwhelmingly male and white. Just one respondent interviewed in the North East was black and one female.

### 3.2 Work status

Workers in the North East were more likely to be directly employed by a company than those from any other region (85% were employed directly by a company compared with 64% of the overall workforce). Just a tenth were self-employed while 4% worked for an agency. The proportion directly employed was relatively high in 2004 (74%) but has increased further.

Table 3.2 Work status						
	North East 2007 %	Overall Workforce (UK/ROI) 2007 %	Years working in construction			
			<1 year %	1–2 %	3–4 %	5+ %
Employed by a company	85	64	71	100	87	84
Self-employed	10	29	5	-	13	11
Work for an agency	4	5	19	-	-	4
Unemployed (all ROI)	-	1	-	-	-	-

*Base: North East respondents (427); Overall workforce (3,877)*

In the North East there was little difference in the level of those directly employed by their experience in the industry. However, those working for an agency were highly likely to have less than three year's experience.

<b>Table 3.3 Level of self-employment by occupation</b>			
<b>High</b>		<b>Low</b>	
<b>2007</b>	<b>2004</b>	<b>2007</b>	<b>2004</b>
<b>Carpenters/Joiners (18%)</b>	Bricklayers (45%)	<b>Electrician (0%)</b>	Painters/Decorators (0%)
<b>Bricklayer (14%)</b>	Roofers (33%)	<b>Plant/Machine Operative (4%)</b>	Plumbers (0%)
	Groundworkers (21%)	<b>Labourer/General Operative (7%)</b>	Labourers (9%)

Owing to low base sizes in a number of occupations, only those occupations where we interviewed 15 or more workers have been referenced.

Carpenters/joiners and bricklayers were the most likely occupations to be self-employed although less than a fifth of both of these groups worked for themselves. None of the electricians interviewed were self-employed.

### **3.3 Occupational profile**

Table 3.4 shows how construction workers in the North East classify their current role or occupation.

The most common occupations were bricklayer and labourer/operative with just over a fifth (22%) working in each of these roles. The proportions of each had risen since 2004 when 12% worked as bricklayers and 15% as labourers/operatives. Both of these groups also made up a higher proportion of the North East workforce than is the case for the UK and ROI as a whole where 13% were bricklayers and 17% labourers. As for the UK and ROI as a whole the proportion of plant/machine operatives rose in the North East (up from 4% to 11%).

<b>Table 3.4 Occupational Profile</b>			
	<b>North East 2007 % (No.)</b>	<b>North East 2004 % (No.)</b>	<b>Overall Workforce (UK/ROI) % (No.)</b>
Bricklayer	22 (96)	12 (44)	13 (536)
Labourer/General Operative	22 (92)	15 (56)	17 (674)
Carpenter/Joiner	16 (67)	19 (72)	14 (559)
Plant/Machine Operative	11 (49)	4 (16)	13 (502)
Plumber	5 (22)	N/A	5 (183)
Electrician	4 (17)	8 (32)	7 (247)
Plasterer/Dry-liner	3 (13)	4 (15)	5 (190)
Civil Engineering Operative	3 (11)	N/A	2 (75)
Supervisor	2 (9)	N/A	5 (192)
Banksman/Banksperson	2 (8)	N/A	2 (81)
Manager	2 (8)	N/A	3 (111)
Painter/Decorator	2 (8)	5 (20)	2 (97)
Roofer	1 (6)	4 (15)	4 (133)
Pipe Fitter	1 (5)	4 (14)	3 (102)
Welder	1 (4)	N/A	1 (32)
Steel Erector/Rigger	1 (3)	N/A	2 (75)
Scaffolder	1 (3)	3 (13)	3 (112)
Glazier	1% (3)	N/A	1 (32)

*Base: North East respondents (2007: 427; 2004: 379); Overall workforce (3,877)*

### **3.4 Years working in construction**

The proportion of new entrants working in the construction industry in the North East was lower than for the UK and ROI as a whole with 5% of workers in the North East having had no more than a year's experience compared with 11% of those across the whole sample.

Consistent with the older profile of the workforce in the North East, the proportion having had more than 20 years experience was higher in the North East than for the UK and ROI (39% in the North East vs. 27% across the UK and ROI).

The table below summarises results using cumulative proportions:

<b>Table 3.5 Years spent working in construction (cumulative)</b>		
	<b>North East 2007 %</b>	<b>Overall Workforce (UK/ROI) %</b>
Less than 6 months	1	5
A year or less	5	11
2 years or less	11	17
5 years or less	23	33
10 years or less	38	50
20 years or less	60	71
More than 20 years	39	27
<i>Base: North East respondents (427); Overall workforce (3,877)</i>		

Labourers were most likely to be new recruits to the industry (11% of labourers had worked in the sector for a year or less). Agency workers were also more likely than average to be relatively new to the industry (21% had less than a year's experience).

#### **3.4.1 Construction employment**

Around a third (34%) of those in the North East ended up in the construction industry after first starting in another field. This is slightly below the figure for the UK and ROI as a whole (38%).

Labourers and plant/machine operatives were more likely than average to have worked in another field prior to starting in construction. Around three-fifths (61%) of labourers and almost two-fifths (41%) of plant machine operatives had previously worked in another industry. Conversely less than a fifth of bricklayers and carpenters/joiners had started out in a non-construction occupation.

Of those who did not start in construction, the vast majority (85%) had worked only in construction since joining the industry with a further 5% working only in construction jobs but having periods of unemployment. The remainder (10%) had dipped in and out of the industry occasionally taking work in other fields. This was a slightly lower proportion than for the UK and ROI as whole (13%).

#### **3.4.2 Occupational switching and progression**

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

North East construction workers were much more likely than average to have always had the same trade (81% vs. 60% of the overall workforce).

Plant/machine operatives and pipe fitters were the most likely occupations to have switched trades in the past. Around two-fifths (43%) of plant machine operatives had previously had another role as had around a third (32%) of pipe fitters.



## 4 Qualifications and Skills

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

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

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

Where possible results are compared with the findings from the research conducted in 2004.

### 4.1 Construction skill cards and certificates

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

The proportion holding a skill card or certificate in the North East was 68%, the same as for the UK and ROI as a whole. The rate in growth of ownership since 2004 was also similar to that for the overall workforce.

Younger workers in the North East were more likely to have a skill card or certificate than average with 70% of 16–24s having one compared with 56% across the UK and ROI.

As for the UK and ROI as a whole the North East has also seen strong growth in the proportion of self-employed construction workers with skill cards or certificates since 2004. Around two-thirds (66%) of these workers had a skill card or certificate compared with just under half (48%) in 2004. In contrast the proportion of directly employed workers with a skill card or certificate was virtually unchanged (up to 67% in 2007 from 64% in 2004).

<b>Table 4.1 Whether have a skill card/certificate by other variables</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
<b>Overall</b>	<b>68</b>	60	68
<1 year in construction	<b>38</b>	21	39
1–2 years	<b>67</b>	48	60
3–4 years	<b>71</b>	60	65
5+ years	<b>69</b>	67	75
16–19	<b>66</b>	N/A	43
20–24	<b>73</b>		62
25–44	<b>70</b>	62	73
45+	<b>64</b>	62	72
Employed directly	<b>67</b>	64	70
Self-employed	<b>66</b>	48	69
Agency worker	<b>84</b>	54	62
<i>Base: North East respondents (2007: 427; 2004: 379); Overall workforce (3,877)</i>			

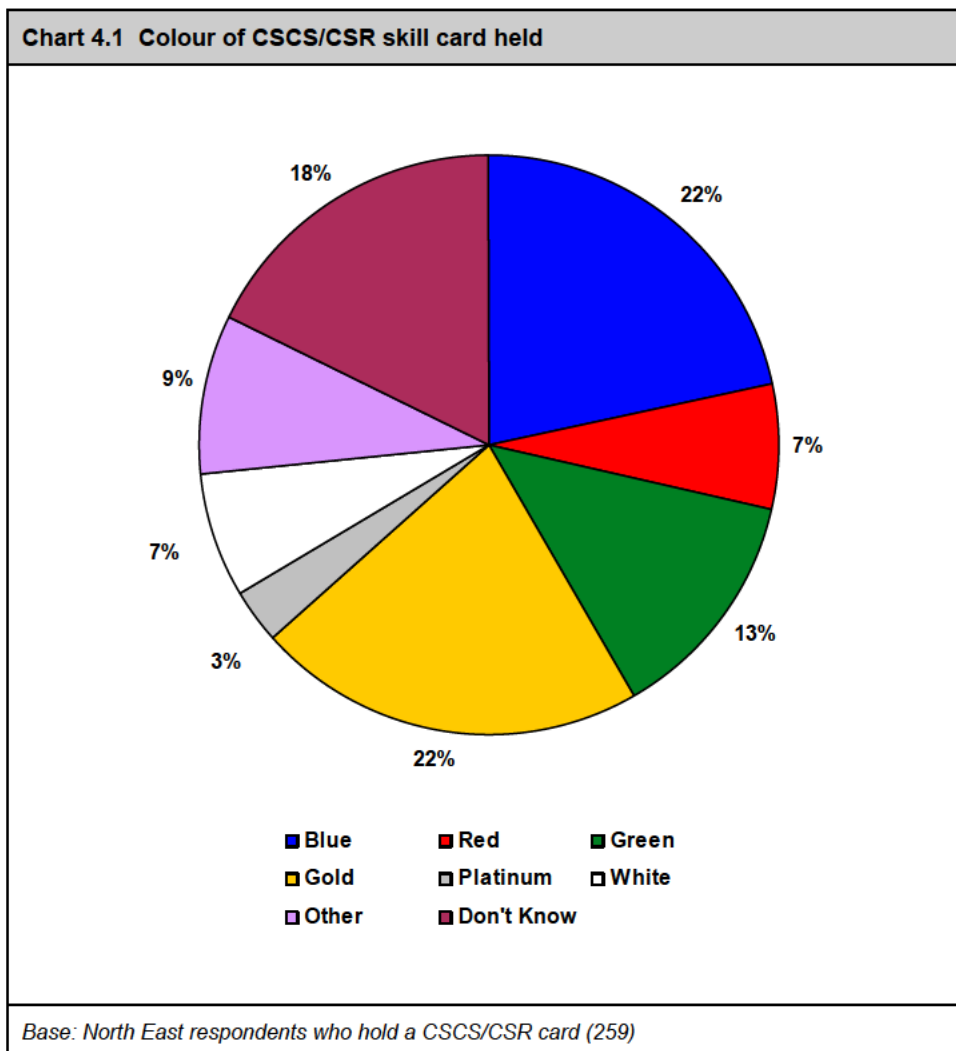
The main differences by occupation are shown in the following table which lists occupations with the highest and lowest penetrations from the 2004 and the 2007 surveys.

<b>Table 4.2 Whether have a skill card/certificate by occupation</b>			
<i>High likelihood</i>		<i>Low likelihood</i>	
<b>2007</b>	<b>2004</b>	<b>2007</b>	<b>2004</b>
<b>Plant/Machine Operatives (86%)</b>	Plant/Machine Operatives (94%)	<b>Labourers/General Operatives (60%)</b>	Painters/Decorators (40%)
<b>Plumbers (82%)</b>	Electricians (75%)	<b>Bricklayers (60%)</b>	Roofers (40%)
<b>Electricians (76%)</b>	Plumbers (71%)	<b>Carpenters/Joiners (61%)</b>	Labourers/General Operatives (41%)
	Carpenters/Joiners (68%)		Plasterers (47%)

Plant/machine operatives continued to be highly likely to have a skill card or certificate. Plumbers (82%) and electricians (76%) were next most likely to hold a card or certificate. Labourers were still among the least likely to have a card or certificate although the proportion of this group holding one had risen from 41% in 2004 to 60% in 2007.

The main type of card held in the North East was the CSCS card, held by 61% of workers. The occupation most likely to hold this card was plant/machine operatives (71%).

Just over one in five (22%) of CSCS card holders said they had a blue, NVQ/SVQ Level 2 card, the same proportion said they had a gold, NVQ/SVQ Level 3 card. Just over a tenth (13%) had a green, general site workers card, a lower proportion than seen for the UK and ROI as a whole (21%), perhaps due to the lower proportion of less experienced workers in the North East. Despite saying they held a CSCS/CSR card, almost one in five (18%) were not sure what colour or level it was. Chart 4.1 shows the proportion of card-holders with each colour of card.



## 4.2 Construction qualifications held

Having been asked to describe which skill card or certificate they had obtained (if any), workers were also asked what other formal qualifications relevant to construction they held (excluding first aid certificates). As a relatively high proportion (5% in the North East; 8% overall) did not give an answer to this question in 2007, results in this section are based on those who gave an answer. Around two-thirds (66%) of workers who gave a response had one of these qualifications, virtually the same proportion as in 2004. However, the North East was still the region where workers were most likely to have a construction related qualification.

As with skill cards/certificates, there were predictable differences by age and length of time worked in the industry.

<b>Table 4.3 Hold any construction specific qualification</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
<b>Overall</b>	<b>66</b>	67	48
<1 year in construction	33	12	15
1–2 years	42	42	30
3–4 years	62	52	39
5+ years	70	79	57
16-19	54	N/A	30
20–24	79		40
25–44	66	68	54
45+	65	83	50
Employed directly	65	66	48
Self-employed	80	73	54
Agency worker	56	68	30
<i>Base: North East respondents who gave a response 2007 (406); All North East respondents 2004 (379); All UK/ROI respondents who gave response (3,594)</i>			

Those aged under 20 and with less than two years experience were least likely to have a qualification. As for the UK and ROI as a whole, for those aged over 25 there was little difference in the proportions holding one of these types of qualification suggesting that if workers don't get one of these qualifications relatively early in their career they are unlikely to do so later on.

A particularly high level (80%) of self-employed workers had a formal qualification, far higher than the average across the whole of the UK and ROI (54%).

<b>Table 4.4 Whether have construction qualifications</b>			
<i>High likelihood</i>		<i>Low likelihood</i>	
2007	2004	2007	2004
<b>Carpenters/Joiners (89%)</b> <b>Bricklayers (83%)</b> <b>Plumbers (77%)</b>	Painter/Decorators (95%) Electricians (91%) Bricklayers (89%) Plumbers (86%)	<b>Labourers/General Operatives (30%)</b> <b>Plant/Machine Operatives (55%)</b>	Labourers/General Operatives (14%) Dry-liners (53%) Groundworkers (55%)

Bricklayers and plumbers were still among the most likely occupations to have a formal qualification, although carpenters/joiners were most likely to have one in 2007. Labourers were still the least likely to hold a formal qualification but around twice as high a proportion of this group had one in 2007 than 2004 (30% vs. 14%). Therefore the proportion of labourers with a skill card or certificate and the proportion with a formal qualification both saw large increases from 2004 to 2007.

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

<b>Table 4.5 Main type of highest qualification held</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
NVQ/SVQ	53	34	51
City and Guilds	35	37	34
Construction Award	3	N/A	2
Apprenticeship	3	19	4
HNC/HND/BTEC higher	3	1	1
Degree	1	N/A	1
<i>Base: North East respondents with qualification (2007: 276, 2004: 199); All UK/ROI respondents who gave response (1,810)</i>			

The shift towards NVQs/SVQs seen for the overall workforce was reflected in the results for the North East where 53% of those with a qualification had an NVQ or SVQ similar to the proportion of the overall workforce that held one (51%). The proportion holding a City and Guilds was also similar to that for the UK and ROI as a whole (35% vs. 34%).

There has been a sharp decline in the proportion of workers with apprenticeships in the North East. Almost one in five of those with a construction qualification said they had an apprenticeship in 2004 compared with just 3% now.

### **4.3 Working towards construction qualifications**

North East workers were less likely than average to be working towards a construction specific qualification (13% in the North East compared with 17% across the UK and ROI) and slightly less likely to be working towards a qualification than in 2004 when 15% were working towards one.

<b>Table 4.6 Working towards a construction specific qualification</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
<b>Overall</b>	<b>13</b>	15	17
<1 year in construction	<b>24</b>	45	28
1–2 years	<b>33</b>	45	32
3–4 years	<b>32</b>	24	36
5+ years	<b>9</b>	6	11
16–19	<b>41</b>	N/A	47
20–24	<b>22</b>		27
25+	<b>10</b>	6	12
<i>Base: North East respondents (2007: 427; 2004: 379); Overall workforce 2007 (3,877)</i>			

As we would expect younger workers were most likely to be working towards a qualification (41% of 16–19s compared with just 10% of over 25s). Only three-tenths of those working towards a qualification did not already have one (equivalent to 4% of the total workforce in the North East compared with 8% of the UK/ROI workforce). This may be due to the more experienced nature of the North East workforce together with their higher likelihood of already holding a formal qualification other than a skill card or certificate.

Just over two-thirds (68%) were working towards an NVQ or SVQ. Only 9% were working towards a City and Guilds qualification.

#### **4.4 Managerial qualifications**

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

Just a tenth of workers in the North East said they had supervisory or managerial duties on site (compared with 18% across the UK and ROI). The vast majority (86%) of these managers had five years or more experience in the construction industry.

Around a third (32%) of those with supervisory or managerial duties had not received any training designed to improve their skills, lower than the proportion seen across the UK and ROI (47%) and far better than 2004 when 83% had not received any of this type of training.

Those who had received some training were more likely to have undertaken in-house training rather than anything that was part of any accredited, industry recognised programme. The types of training undertaken are shown in table 4.7.

<b>Table 4.7 Type of training received to improve management or supervisory skills</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
In-house training	36	7	31
None/can't remember	32	83	47
SMSTS (Site Manager Safety Training Scheme)	14	N/A	8
Site Safety Supervisors Course (for CSR)	14	N/A	7
Chargehand and Team Leader Training	11	4	10
Assessor and Verifier Training	7	N/A	5
CSCS training	7	N/A	1
Supervisory Management Training and Development	7	1	2
CIOB Site Supervisor (First Line Supervisor – FLS)	7	3	2
NVQ/SVQ Level 4 in Construction Site Management	7	N/A	1
IOSH (Institute of Occupational Safety and Health)	5	N/A	3
Civil engineering Site Managers Scheme	5	N/A	3
Project Management Short Courses	2	N/A	3
IOSH Managing Safely for Construction Managers	2	N/A	3
Managing Safely in the Construction Industry (for CSR)	2	N/A	3
CIOB Site Management Education and Training Scheme (SMETS)	2	N/A	2
Institute of Supervision and Management Workshops	2	N/A	1
IOSH Safely for Senior Executives	2	N/A	1

*Base: All with management and supervisory duties North East (2007: 44, 2004: 72); All UK/ROI respondents who gave response (678)*



## 4.5 Summary of qualification and skills card status

Table 4.8 summarises the situation regarding qualifications and skill cards/certificates attained and working towards. The results for the North East are compared with the results in 2004 and the overall results in 2007.

<b>Table 4.8 Qualification status</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
Hold a formal construction qualification or a skills card/certificate or working towards a qualification	<b>86</b>	88	82
Hold a formal construction qualification or a skills card/certificate	<b>84</b>	82	78
Hold a skills card/certificate	<b>68</b>	60	68
Hold a skills card/certificate but no other construction qualification	<b>22</b>	15	33
Working towards a qualification	<b>13</b>	15	17
<i>Base: North East respondents (2007: 427; 2004: 379); Overall workforce (3,877)</i>			

As there was a higher proportion of workers in the North East with formal qualifications apart from a skill card or certificate overall competence/qualification levels were slightly higher than average.

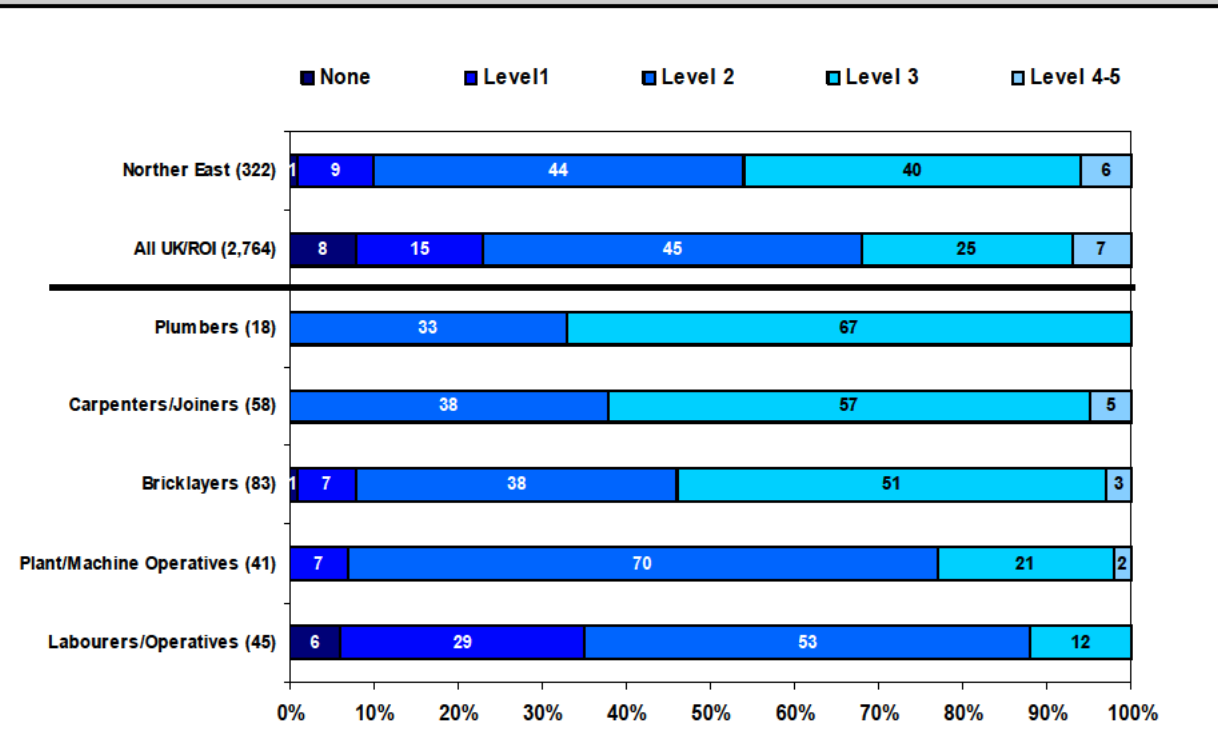
## 4.6 Competence/qualification level of the construction workforce

Using the responses given by workers for qualifications and skill cards/certificates held and managerial training undertaken, the highest competence/qualification levels have been derived for each worker. The technical report shows the definitions of each level, which are largely the same as those used in the 2004 survey<sup>3</sup>.

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

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

**Chart 4.2 Competence/qualification level by occupation**



*Base: All respondents where a competence/qualification level could be calculated (322)*

Only occupations with at least 15 respondents where a competence/qualification level could be calculated are shown.

Just 1% of the workforce in the North East had no qualifications (i.e. they don't hold any qualification, management training or skill cards/certificates), compared with 8% of the overall workforce across UK and ROI. Workers in the North East were also more likely to be qualified to at least grade three than average (46% compared with 32% for the UK/ROI).

Carpenters and Bricklayers were most likely to have a level 3 qualifications or above. Labourers were more likely than other occupations to have no qualifications (although this was still lower than average at 6%), with three in ten possessing a level 1 qualification and just over half having a level 2 qualification.

## 4.7 Self assessment of skill level

Workers' own perceptions as to whether they had all the skills they need to do their current job were ascertained after they were asked about the various qualifications they held or were working towards. Table 4.9 summarises the results.

<b>Table 4.9 Self assessment of skill level and training needs for current job</b>			
	<b>North East 2007 %</b>	<b>No qualification, skill card/certificates nor working towards any %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
Have all the skills needed for current job	90	93	76
Need more training or qualifications	4	3	13
Need more experience	5	3	8
Don't know	1	-	3
<i>Base: North East respondents (427); No qualification nor working towards any (58); Overall workforce (3,877)</i>			

The relatively highly qualified nature of the workforce in the North East is reflected in the fact that nine in 10 of them said that they had all the skills needed for their current job. This compares to around three-quarters (76%) of the overall UK/ROI workforce that felt the same way.

In the North East those with no qualifications and not working towards any were no more likely than average to see the need for more training or qualifications in their current job.

All workers were also asked whether they felt they needed training in basic skills. Those in the North East were a lot less likely than average to feel they needed this type of training with just 6% identifying a need.

<b>Table 4.10 Need for training in basic skills</b>			
	<b>North East 2007 %</b>	<b>All identifying a need 2007 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
<b>Any need identified</b>	<b>6</b>	100	21
Reading	4	72%	12
Writing	3	52%	10
Maths	3	48%	10
Speaking English	3	44%	12
<i>Base: North East respondents (427); No qualification nor working towards any (25); Overall workforce (3,877)</i>			

The other means by which increased training may arise from a demand-led worker angle is those wishing to change occupation within the sector and anticipating the need for re-training. In the North East 8% of workers said they would like to change the type of work they do within the construction industry (lower than the overall workforce average of 14%) and the vast majority of these workers (91%) said that they would need further training and qualifications to effect a switch in roles.

The most common roles workers wanted to switch to tended to be more skilled. 29% of those who wanted to switch said they would like a managerial position, 15% wanted to be bricklayers, and 12% supervisors. The top two motivators given for switching were better pay (mentioned by 50%) and more interesting work (cited by 44%).

One challenge to delivering training to site-based workers is the relatively short time that workers stay at one site as well as the uncertainty that exists about how long the work will last. The following table shows the results for the length of time workers expect to work at their current site, results are shown for the North East and overall.

<b>Table 4.11 Total length of time expect to work at site</b>		
	<b>North East 2007 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
<1 month	<b>6</b>	11
1–3 months	<b>17</b>	20
>3 up to 6 months	<b>14</b>	16
>6 months up to a year	<b>18</b>	17
More than a year	<b>30</b>	20
Don't know	<b>15</b>	17
<i>Base: North East respondents (427); Overall workforce (3,877)</i>		

Workers in the North East show a greater stability than average on this measure. Less than a quarter (23%) said that they will be at their current site for three months or less compared with almost a third (31%) of the overall workforce. They were also more likely to have said they will be at their current site for more than a year (30% vs. 20% of the overall workforce).

## 5 Mobility

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

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

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

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

## 5.1 Worker origin

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

Table 5.1 Where from originally/international and inter-region movement													
	Where currently working												
Where from originally	NI %	NE %	Scot %	Wales %	NW %	Y&H %	WM %	ROI %	EM %	SW %	EE %	SE %	Lon %
Northern Ireland	92	*	-	2	1	-	*	*	1	*	1	1	1
North East	*	84	4	1	*	5	2	*	1	1	1	1	1
Scotland	1	1	84	*	*	1	1	*	1	1	-	*	1
Wales	-	*	-	79	3	1	1	-	2	5	*	2	1
North West	*	1	4	2	74	5	2	-	2	8	1	1	1
Yorkshire and Humber	*	4	2	-	4	74	2	1	9	3	1	1	1
West Midlands	*	-	1	1	11	-	70	-	7	7	1	3	*
Republic of Ireland	2	*	-	1	1	2	5	67	2	2	5	5	5
East Midlands	*	*	*	1	1	6	7	-	65	4	2	2	1
South West	-	1	-	7	-	*	3	-	1	60	2	4	*
East of England	1	4	-	-	*	3	1	*	2	2	57	7	9
South East	-	1	-	1	*	1	1	*	2	8	6	49	15
London	-	*	1	1	*	*	1	*	1	3	13	12	33
Outside UK and ROI	2	1	2	4	-	1	3	29	2	1	8	8	22

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

The vast majority (84%) of workers within the North East were originally from the region. Only Northern Ireland had a higher proportion of native workers. Furthermore, incoming workers were most likely to come from the neighbouring regions of Yorkshire and Humber and the East of England.

## 5.2 Location of workplace, current and permanent residence

Respondents were all asked where they were living to get to their current place of work, whether this was their permanent address and, if not, where their permanent address was.

Table 5.2 presents results for *all* regions showing:

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

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

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

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

Again it was the vast majority of the workforce in the North East that have a permanent residence within the region (91%) while 92% have a permanent or temporary home within the region. However, the proportion that had a permanent residence outside of the region had almost doubled from 2004, rising from 5% to 9%.



Table 5.3 shows the percentage of construction workers working outside the nation/region where they have a permanent residence. Workers from the North East were some of the least likely to work outside their own region with 16% doing so. Compared with 2004, those from the North East were less likely to work in other regions in 2007 (16% compared with 21% in 2004). Construction sites in the North East therefore appear to have provided more work for those within the region as well as attracting more workers from other areas than was the case in 2004.

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

### 5.3 Temporary accommodation

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

Only 1% of construction workers in the North East lived in temporary accommodation, a figure well below the average of 7%. This again demonstrates the relatively low level of incoming workers to the region.

## 5.4 Proportion of career spent in current location

Workers were asked what proportion of the time they had worked in construction in the UK/ROI had been spent on sites in the nation/region where they were currently working. Workers in the North East were more likely than average to have spent all of their time in the construction industry within the region (54% vs. 45% of those across the UK and ROI).

Those with some sort of construction specific qualification were less likely to have spent all of their time in the industry in the region than those without (49% of those with qualifications had not worked outside the region compared with 63% without qualifications). This will be partly a function of age as younger respondents will have had less chance both to get qualifications and to have worked elsewhere but it does suggest that highly skilled workers are more mobile.

Table 5.4 Proportion of construction career spent in current nation/region			
	North East 2007 %	North East 2004 %	Overall Workforce (UK/ROI) 2007 %
All of it	54	45	43
Most of it	35	36	33
Around half	7	9	9
Small proportion	3	8	8
Only this job	1	N/A	3
Don't know	<1	N/A	3

*Base: North East respondents (2007: 427; 2004: 379); Overall workforce (3,877)*

## 5.5 Travel to work distances

The mean number of miles travelled to work (distance from home to work) was 23 miles, virtually the same as the UK and ROI average of 24 miles. Workers in the North East were less likely than average to travel less than five miles to work (14% vs. 24% for the UK/ROI). However, only 7% travelled over 50 miles compared with 10% of the overall workforce.

## 5.6 Sub-sector mobility

All workers were asked whether they had spent significant parts of their construction career on any of the following types of project: new housing; housing repair and maintenance; commercial work such as shops, offices, pubs etc.; private industrial such as warehousing, land reclamation etc.; public non-housing such as schools, landscaping etc. and infrastructure such as road, tunnel etc. Results are summarised in table 5.5<sup>4</sup>.

<b>Table 5.5 Type of projects spent significant periods of construction career on</b>		
	<b>North East 2007 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
New housing	83	73
Housing repair and maintenance	44	38
Public non-housing	39	44
Commercial work	38	43
Private industrial	29	33
Infrastructure	23	21
One type of project only	36	34
Two types of project only	22	19
Three types of project only	12	15
Four types of project only	12	12
Five types of project only	8	11
Worked on all six types of project	8	6
<i>Base: North East respondents (2007: 427; 2004: 379); All respondents (3,877)</i>		

Those in the North East were more likely than average to have worked on new housing and housing repair and maintenance projects. Though the profile of workers in relation to number of projects worked on is similar to the overall workforce.

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

## 5.7 Leaving the industry

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

<b>Table 5.6 Likelihood of working in construction in five years time</b>			
	<b>North East 2007 %</b>	<b>North East 2004 %</b>	<b>Overall Workforce (UK/ROI) 2007 %</b>
Definitely will	60	40	44
Very likely	26	36	32
Quite likely	6	11	10
Quite unlikely	1	3	2
Very unlikely	1	2	2
Definitely will not	1	3	2
Hope to be retired	3	N/A	2
Don't know	2	5	6
<i>Base: North East workers aged under 60 (2007: 397; 2004: 364); All respondents aged under 60 (3,686)</i>			

The workforce in the North East appears to be more stable than that for the UK and ROI as a whole with three-fifths of construction site workers aged 60 or below having said that they definitely will be in the industry in five years time compared with two-fifths of the overall workforce.