

Workforce Mobility and Skills in the UK Construction Sector

South West Report

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1 Background, Objectives and Methodology

1.1 Introduction

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

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

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

1.2 Key objectives of the research

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

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

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

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

1.3 Methodology

The key elements of the research approach were as follows:

1.3.1 Desk research

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

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

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

1.3.2 Sampling

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

From the projects identified as being eligible for inclusion in the survey (the steps taken to select eligible records from Glenigan are detailed in the technical report), a stratified random sample of 99 postcode districts (e.g. NR2) was drawn to produce a representative sample of locations across the UK. For each selected district six eligible projects were identified. Projects were selected on the basis of value, 35% of sites with a value of less than £1 million and 65% of sites with a value of more than £1 million. 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 is based on fieldwork conducted in the South West from February to July 2007. This consisted of a total of 255 face-to-face interviews with site based workers obtained across 24 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 South West accounted for approximately 8% of the UK/ROI workforce.

Figures from the site managers interviewed at the telephone fieldwork stage indicated that there were 829 workers across the 24 sites. Using this figure it would appear that around 31% 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 a 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 it.

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 South West from February to July 2007. This consisted of a total of 255 face-to-face interviews with site based workers obtained across 24 sites.

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

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

2.1 The profile of the workforce

The workforce in the South West had an older profile than that of the overall workforce with almost a third (31%) aged 45 or over compared with around a quarter (26%) of the UK/ROI workforce. Probably as a result of this older profile a higher proportion were also more likely to have more than 20 years experience (32% in the South West compared with 27% of the overall workforce).

A wide range of occupations was covered in the research with the most prevalent being plant/machine operatives (18%), carpenters/joiners (16%) and bricklayers (15%). Together these occupations accounted for around half of the construction workforce interviewed in the South West.

The South West had one of the highest proportions of self-employed workers in the UK (37%), almost three-fifths (59%) were employed directly by a company while just 4% worked for agencies which were most likely to be used for labouring/general operative positions (15% of these workers were employed by agencies).

2.2 Qualifications and skills

The proportion of those in the South West who had either a construction skill card or certificate grew from 55% in 2004 to 70% in 2007, a rate of growth slightly higher than that seen for the overall workforce. As for the UK and ROI as a whole, the South West has seen particularly strong growth in the proportion of self-employed workers having one of these qualifications with almost three-quarters (74%) having one in 2007 compared to just over half (52%) in 2004.

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

In contrast, the proportion with a qualification relevant to construction other than a skill card or certificate fell from 2004 to 2007 (it remained relatively stable in the UK and ROI as a whole). Around half (49%) held such a qualification in 2007 compared to almost three-fifths (58%) in 2004. This decline is mainly due to a fall in the proportion of the directly-employed who hold this type of qualification.

As for the UK as a whole workers in the South West were more likely to hold an NVQ or SVQ in 2007 than 2004 (46% had one in 2007 compared to 23% in 2004). However, the proportion holding City and Guilds qualifications in the South West had not fallen as quickly as the rest of the UK, perhaps due to the slightly older profile of the workforce. Over two-fifths (42%) still had a City and Guilds in 2007 compared to just under half (47%) who had one in 2004.

Just over a fifth (21%) of workers in the South West said they had supervisory or managerial duties on site. The proportion of this group that had received training to improve their skills in this area had increased since 2004 (up to 45% from 24%) and was at a similar level to the rest of the UK and ROI. However, it was still the case that over half do not receive this type of training.

The proportion of the workforce that were working towards a construction qualification (most commonly an NVQ or SVQ) was 16%, around the same level as for the UK and ROI as a whole. Around two-thirds of those working towards a qualification did not already have one. This means that a tenth of the overall workforce in the South West did not currently have a qualification but were working towards one.

Those in the South West were slightly more likely than the workforce across the UK and the ROI to have said that they need more training and qualifications in their current job (17% vs. 13%).

Just under a fifth (18%) felt they needed training in basic skills, a slightly lower proportion than for the UK and ROI as a whole (21%). In particular there seemed to be less of a need for training in reading, writing and speaking English perhaps due to the small proportion of workers in the region who come from outside the UK or ROI.

There may be some potential demand for training from those who are looking to change their roles within the construction industry. Just over a tenth (12%) of those in the South West said they would like to change the work they do and the vast majority of them (93%) 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. Workers in the South West were slightly more likely to say they will stay at their site for no longer than three months than average (36% vs. 31%) although they were also more likely to say that they will stay at the same site for more than a year (24% vs. 20%).

2.3 Mobility

The South West had one of the lowest proportions of native workers across all regions (only the East of England, the South East and London had a lower proportion) with just three-fifths of workers coming from the region. However, a very small minority (1%) of workers in the South West came from outside the UK and ROI.

Construction sites in the South West appear to have provided more work for both those within the region and outside of it in 2007 than was the case in 2004. Workers from the South West were some of the least likely to work outside their own region (15% vs. 27% in 2004). Also, just over a fifth (22%) of workers in the South West did not permanently live in the region, an increase from 13% in 2004.

The average distance travelled to work was 21 miles, slightly lower than for the UK and ROI as a whole (24 miles). Workers in the South West were more likely than average to travel less than five miles to work (33% vs. 24% for the UK and ROI) but were just as likely to travel over 50 miles (11%).

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
- the proportion working directly for a company, self-employed or for an agency, and the extent to which they are working on a permanent or temporary basis
- the occupational profile of the sample and career histories 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 South West and compares this to the profile in 2004 and the overall workforce interviewed in the survey.

Table 3.1 Demographic profile of the sample			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
<i>Age: 16–19</i>	7	20	8
20–24	16		16
25–34	20	24	25
35–44	25	28	25
45–54	20	16	16
55+	11	12	10
<i>Ethnicity: White</i>	98	99	96
Black	2	1	2
Asian	-	N/A	1
Other	-	N/A	1
<i>Gender: Male</i>	99	100	99
Female	1	*	*
<i>Base: South West respondents (2007: 255; 2004: 509); Overall workforce (3,877)</i>			

As for the construction workforce across the UK/ROI the age profile of workers in the South West was broadly spread. The South West had a somewhat older site-based construction workforce with almost a third (31%) aged 45 or older (compared with 26% of the UK/ROI workforce) with this proportion increasing slightly since 2004 (28%). However, 16–24s now make up 23% of the workforce compared with 20% in 2004.

It was still the case that the workforce was overwhelmingly male (99%) and white (98%). Only two women and five black respondents were interviewed in the South West.

3.2 Work status

Although around three-fifths (59%) of site workers were employed directly by a company, workers in the South West were more likely to be self-employed than the UK and ROI as a whole (37% versus 29% overall).

As for the overall sample those who have been in construction the longest were most likely to be self-employed (40% of those with at least five years experience were self-employed compared with 26% with less experience). Those with less than a years experience were most likely to work for an agency (9% did so compared with 3% of those with at least five years experience).

Table 3.2 Work status						
	South West 2007 %	Overall Workforce (UK/ROI) 2007 %	Years working in construction			
			<1 year %	1–2 %	3–4 %	5+ %
Employed by a company	59	64	64	74	71	57
Self-employed	37	29	27	21	29	40
Work for an agency	4	5	9	5	-	3
Unemployed (all ROI)	-	1	-	-	-	-

Base: South West respondents (255); Overall workforce (3,877)

Agency workers account for 4% of the total. They were most likely to be used for labouring/general operative positions where 15% of workers were employed by an agency.

Table 3.3 Level of self-employment by occupation			
High		Low	
2007	2004	2007	2004
Dry-liners (71%)	Bricklayers (77%)	Electrician (11%)	Managers (13%)
Bricklayers (68%)	Carpenters/Joiners (77%)	Plant/Machine Operatives (15%)	Scaffolders (14%)
Carpenters/Joiners (50%)	Dry-liners (77%)	Labourer/General Operatives (19%)	Groundworkers (20%)
		Supervisors (19%)	

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

As in 2004, dry-liners, bricklayers and carpenters and joiners were most likely to be self-employed. The occupations where workers were least likely to be self-employed were electricians and plant/machine operatives.

3.3 Occupational profile

Table 3.4 below shows how construction workers in the South West classify their current role or occupation.

The most common occupation was plant/machine operative (18%), followed by carpenters/joiners (16%) and bricklayers (15%). The growth in the proportion of plant/machine operatives in the South West (up to 18% from 7% in 2004) was even stronger than the growth seen across the UK and ROI as a whole (up to 13% from 7% in 2004).

Table 3.4 Occupational Profile			
	South West 2007 % (No.)	South West 2004 % (No.)	Overall Workforce (UK/ROI) 2007 % (No.)
Plant/Machine Operative	18 (47)	7 (37)	13 (502)
Carpenter/Joiner	16 (40)	11 (56)	14 (559)
Bricklayer	15 (38)	12 (62)	13 (536)
Labourer/Operative	10 (26)	12 (63)	17 (674)
Dry-liner/Plasterer	8 (21)	4 (22)	5 (190)
Electrician	7 (19)	7 (38)	7 (247)
Supervisor	6 (16)	3 (15)	5 (192)
Roofer	3 (8)	N/A	4 (133)
Plumber	3 (8)	5 (24)	5 (183)
Pipe Fitter	3 (8)	3 (14)	3 (102)
Steel Erector/Rigger	2 (6)	N/A	2 (75)
Scaffolder	2 (6)	N/A	3 (112)
Ceiling Fixer	2 (5)	N/A	1 (27)
Technical	2 (5)	N/A	1 (38)
Landscaper	2 (5)	N/A	<1 (10)
Manager	2 (4)	5 (24)	3 (111)
Civil Engineering Operatives	2 (4)	N/A	2 (75)
Glazier	2 (4)	N/A	1 (32)
Floorer	2 (4)	N/A	1 (41)
Welder	1 (3)	N/A	1% (32)
Painter/Decorator	1 (3)	5 (27)	2 (97)
Banksman/Banksperson	1 (3)	N/A	2 (81)

Base: South West respondents (2007: 255; 2004: 509); Overall workforce (3,877)

3.4 Years working in construction

The proportion of new entrants working in the construction industry was lower for the South West than the UK and ROI as a whole with 7% of workers in the South West having no more than a year's experience compared with 11% of those across the whole sample.

Consistent with the slightly older profile of the workforce in the South West, the proportion having more than 20 years experience was higher in the South West than for the UK and ROI.

The table below summarise results using cumulative proportions:

Table 3.5 Years spent working in construction (cumulative)		
	South West 2007 %	Overall Workforce (UK/ROI) 2007 %
Less than 6 months	2	5
A year or less	7	11
2 years or less	15	17
5 years or less	31	33
10 years or less	44	50
20 years or less	67	71
More than 20 years	32	27
<i>Base: South West respondents (255); Overall workforce (3,877)</i>		

Labourers and plasterers or dry-liners were most likely to be new recruits to the industry (15% of labourers and 14% of plasterers or dry-liners 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 (22% had less than a year's experience).

3.4.1 Construction employment

Around two-fifths (39%) of those in the South West ended up in the construction industry after first starting in another field. This was around the same level as for the UK and ROI as a whole.

Labourers and plant/machine operatives were more likely than average to have worked in another field prior to starting in construction (69% and 57% respectively had previously worked in another industry). Conversely only around a fifth (21%) of bricklayers and a quarter of supervisors 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 4% working only in construction jobs but having periods of unemployment. The remainder (11%) 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.

Around two-thirds (65%) of those in the South West said that they had worked in the same trade since joining the construction industry. This compares to a figure of 60% for whole of the UK and ROI.

Bricklayers and labourers were the most likely occupations to have switched trades in the past, respectively two-fifths (42%) had previously had another role.

4 Qualifications and Skills

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

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

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

4.1 Construction skill cards and certificates

There is a general move in the industry for all persons working on, or visiting, construction sites to have a construction skills 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 had grown slightly more quickly since 2004 in the South West than in the UK and ROI as a whole. Seventy percent of workers in the South West said they held a skill card or certificate compared with 55% in 2004. Sixty-eight percent of the overall workforce across the UK and ROI had a skill card or certificate compared with 57% in 2004.

20–24 year olds in the South West were more likely to have a skill card or certificate than average (67% vs. 62%). The South West has also seen strong growth in the proportion of self-employed construction workers with skill cards/certificates since 2004. Almost three-quarters (74%) of these workers held a skill card/certificate compared with just over a half (52%) in 2004. In contrast the proportion of directly employed workers with a skill card or certificate had only increased by 10 percentage points (up to 68% from 58% in 2004). These increases mirror what was happening across the UK/ROI where the growth in self-employed workers with skill cards or certificates exceeded that for employees.

Table 4.1 Whether have a skill card/certificate by other variables			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	70	55	68
<1 year in construction	23	40	39
1–2 years	58	38	60
3–4 years	71	53	65
5+ years	75	60	75
16–19	39	N/A	43
20–24	67		62
25–44	74	60	73
45+	72	57	72
Employed directly	68	58	70
Self-employed	74	52	69
Agency worker	-	53	62
<i>Base: South West respondents (2007: 255; 2004: 509); Overall workforce (3,877)</i>			

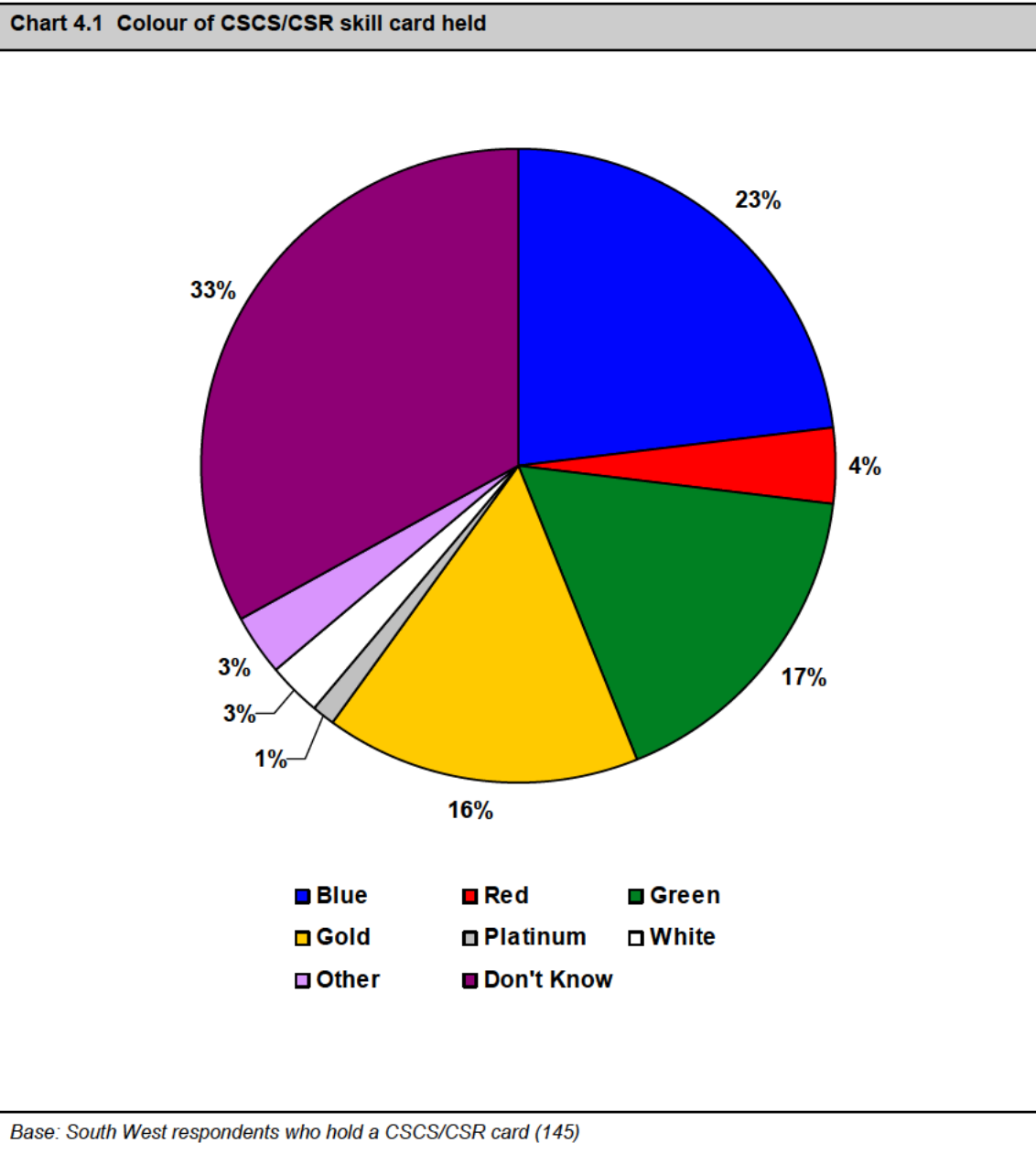
The main differences by occupation are shown in the following table which lists occupations with the highest and lowest penetrations from the 2004 and the 2007 surveys.

Table 4.2 Whether have a skill card/certificate by occupation			
<i>High likelihood</i>		<i>Low likelihood</i>	
2007	2004	2007	2004
Electricians (84%)	Supervisors (87%)	Supervisors (56%)	Labourers/General Operatives (33%)
Bricklayers (74%)	Plant/Machine Operatives (86%)	Labourers/General Operatives (62%)	Carpenters/Joiners (39%)
	Managers (75%)		Bricklayers (39%)

Small base sizes make it difficult to draw any firm conclusions here. However, it appears that the proportion of supervisors with these cards/certificates has fallen and although labourers were still amongst those least likely to have a skill card or certificate the proportion with at least one card/certificate had almost doubled (up from 33% to 62%).

The main type of card held in the South West was the CSCS card, held by 57% of workers. The occupation most likely to hold this card was bricklayers (71%) followed by plasterers/dry-liners (67%) and carpenters/joiners (65%).

In the South West, a higher proportion of CSCS or CSR card holders than in the UK and ROI as a whole did not know what colour their card was (33% in the South West vs. 20% in the UK and ROI). Almost a quarter (23%) said they had a blue card (NVQ/SVQ Level 2), 17% a green, general site workers card and 16% a gold card (NVQ/SVQ Level 3). These results are shown in chart 4.1.



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 (4% in the South West; 8% overall) did not give an answer to this question, results in this section are based on those who gave an answer. Around half (49%) had such a qualification, virtually the same level as for the UK and ROI as a whole but a drop on the 2004 level of 58%.

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

Table 4.3 Hold any construction specific qualification			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	49	58	48
<1 year in construction	9	7	15
1–2 years	26	24	30
3–4 years	42	44	39
5+ years	56	65	57
16–19	33	N/A	30
20–24	36		40
25–44	54	62	54
45+	54	66	50
Employed directly	43	56	48
Self-employed	60	60	54
Agency worker	-	47	30
<i>Base: South West respondents who gave a response 2007 (245); All South West Respondents 2004 (509); All UK/ROI respondents who gave response (3,594)</i>			

As for the UK and ROI as a whole, for those aged over 25 there was little difference in the proportions holding a construction 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.

As for the rest of the UK and ROI, the proportion of self-employed construction workers with a formal qualification relevant to construction remained at the same level as 2004 (60%). However, unlike the UK and ROI as a whole, the proportion of qualified employees had fallen in the South West (down to 43% from 56% in 2004).

Table 4.4 Whether have construction qualifications			
<i>High likelihood</i>		<i>Low likelihood</i>	
2007	2004	2007	2004
Bricklayers (82%)	Plumbers (88%)	Labourers/General Operatives (23%)	Labourers/General Operatives (24%)
Supervisor (80%)	Electricians (82%)	Plant/machine Operatives (24%)	Groundworkers (30%)
Electrician (78%)	Supervisors (80%)	Plasterers/Dry-liners (33%)	
	Carpenters/Joiners (79%)		

Supervisors and electricians were still among the most likely occupations to have a formal qualification, although bricklayers were most likely to have one in 2007. Although plant/machine operatives were most likely to have a skill card or certificate, they were among the least likely occupation to have a formal qualification. Only around a quarter of labourers had a formal qualification, the same proportion as in 2004.

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

Table 4.5 Main type of highest qualification held			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
NVQ/SVQ	46	23	51
City and Guilds	42	47	34
Construction Award	2	N/A	2
Apprenticeship	3	7	4
HNC/HND/BTEC higher	4	2	1
Degree	1	N/A	1

Base: South West respondents with qualification (2007: 121, 2004: 295); All UK/ROI respondents who gave response (1,810)

The shift towards NVQs/SVQs seen for the overall workforce was reflected in the results for the South West where 46% of those with a qualification had an NVQ or SVQ. However, perhaps as a result of the slightly older profile of the workforce, we haven't seen the same shift away from City and Guilds in the South West. Forty-two percent had a City and Guilds in this region compared to 47% in 2004. In comparison this proportion fell from 46% to 34% in the UK and ROI as a whole.

4.3 Working towards construction qualifications

Around one in six (16%) of the South West workforce were working towards a construction qualification, around the same level as for the UK and ROI as a whole.

Table 4.6 Working towards a construction specific qualification			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	16	14	17
<1 year in construction	23	37	28
1–2 years	26	48	32
3–4 years	67	33	36
5+ years	9	8	11
16–19	50	N/A	47
20–24	29		27
25+	11	8	12
<i>Base: South West respondents (2007: 255; 2004: 509); Overall workforce (3,877)</i>			

As we would expect, younger workers were most likely to be working towards a qualification (50% of 16–19s compared with just 11% of over 25s). Around two-thirds of those working towards a qualification did not already have one (equivalent to 10% of the total workforce in the South West).

Just under two-thirds (64%) were working towards an NVQ or SVQ. Only 7% 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.

Around a fifth (21%) of workers in the South West said they had supervisory or managerial duties on site. Unsurprisingly, those with over five years experience in the industry were more likely to have supervisory or managerial responsibilities (26% vs. 5% of those with less than five years experience).

Over half (55%) of those with supervisory or managerial duties had not received any training designed to improve their skills in this area although this proportion was lower than seen in 2004 (66%).

Those who had received some training were most 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.

Table 4.7 Type of training received to improve management or supervisory skills			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
None/can't remember	55	66	47
In-house training	28	21	31
Site Safety Supervisors Course (for CSR)	6	N/A	7
Chargehand and Team Leader Training	2	4	10
SMSTS (Site Manager Safety Training Scheme)	2	18	8
Assessor and Verifier Training	2	2	5
Project Management Short Courses	2	2	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	2	2
CSCS training	2	N/A	1

Base: All with management and supervisory duties South West (2007: 53, 2004: 111); 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 South West are compared with the results in 2004 and the overall results in 2007.

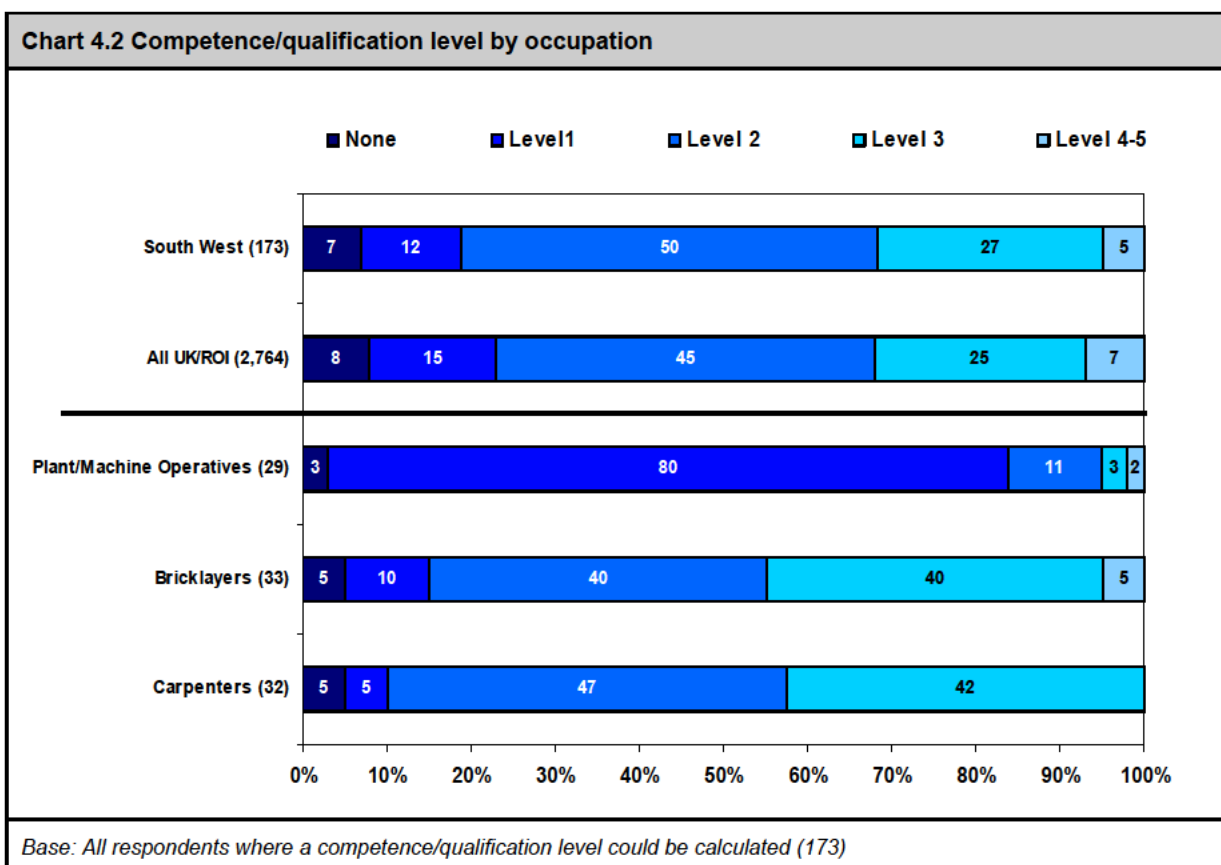
Table 4.8 Qualification status			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
Hold a formal construction qualification or a skills card/certificate or working towards a qualification	82	81	82
Hold a formal construction qualification or a skills card/certificate	78	76	78
Hold a skills card/certificate	70	55	68
Hold a skills card/certificate but no other construction qualification	31	18	33
Working towards a qualification	16	14	17

Base: South West respondents (2007: 255; 2004: 509); Overall workforce (3,877)

Overall competence/qualification levels in the South West were very similar to those seen across the UK and ROI. As for the overall workforce it is encouraging to see an increase in the proportion holding a skills card or certificate since 2004.

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 definitions for each level are largely the same as those used in the 2004 survey³ (the technical report shows the definitions of each level).



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

Just under a tenth (7%) had no competence/qualification level (i.e. they don't hold any qualification, management training or skill cards/certificates). Around three in five were qualified to level 1 or 2 with a third qualified to level 3 or higher. These proportions were very similar to those seen for the overall workforce in the UK and ROI.

³ In 2004 CSCS/CSR green cards were classified as Level 2, in 2007 they were classified as Level 1.

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.

Table 4.9 Self assessment of skill level and training needs for current job			
	South West 2007 %	No qualification, skill card/certificates nor working towards any 2007 %	Overall Workforce (UK/ROI) 2007 %
Have all the skills needed for current job	73	64	76
Need more training or qualifications	17	20	13
Need more experience	9	16	8
Don't know	*	-	3

Base: South West respondents (255); No qualification nor working towards any (45); Overall workforce (3,877)

Those in the South West were slightly more likely than the overall workforce across the UK and the ROI to say that they need more training and qualifications in their current job (17% vs. 13%). This was a much higher proportion than seen in 2004 when just 6% felt they needed more training and qualifications. In the South West those with no qualifications, and not working towards any, were slightly more likely than average to see the need for more training or qualifications in their current job.

Labourers were the most likely occupation to say they needed more training or qualifications (31% said they needed more training or qualifications).

All workers were also asked whether they felt they needed training in basic skills. Those in the South West were slightly less likely than average to feel they needed this type of training. In particular there appears to be less of a need for training in reading, writing and speaking English perhaps due to the small proportion of workers in the region who come from outside the UK or ROI.

Table 4.10 Need for training in basic skills			
	South West 2007 %	All identifying a need 2007 %	Overall Workforce (UK/ROI) 2007 %
Any need identified	18	100	21
Maths	10	55	10
Reading	8	45	12
Writing	7	41	10
Speaking English	5	29	12

Base: South West respondents (255); All identifying a training need (47); Overall workforce (3,877)

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 South West 12% of workers would like to change the type of work they do within the construction industry (slightly lower than the national average) and the vast majority of these workers (93%) said that they would need further training and qualifications to effect a switch in roles.

As was probably expected, labourers were the most likely occupation to say they want to change the work they do (38% of labourers in the South West said they would like a change). The most common roles workers want to switch to tend to be more skilled. 30% of those who wanted to switch said they would like a managerial position, 13% wanted to be plumbers and 10% electricians. The top two motivators given for switching were more interesting work (cited by 63%) and better pay (mentioned by 60%).

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 South West and overall.

Table 4.11 Total length of time expect to work at site		
	South West 2007 %	Overall Workforce (UK/ROI) 2007 %
<1 month	12	11
1–3 months	24	20
>3 up to 6 months	13	16
>6 months up to a year	17	17
More than a year	24	20
Don't know	10	17
<i>Base: South West respondents (255); Overall workforce (3,877)</i>		

Workers in the South West were slightly more likely than average to say they will stay at the same site for more than a year (24% vs. 20%) but they were also slightly more likely to say they will only stay at the site for no more than three months (36% vs. 31%).

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

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

Only three-fifths of construction site workers in the South West were originally from that region. Only the East of England, the South East and London had a lower proportion of native workers.

The vast majority of incoming workers in the South West did come from Britain with just 1% coming from outside the UK and ROI.

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)

The South West appears to be increasingly reliant on workers from other regions. Just over a fifth (22%) of workers in the South West did not permanently live in the region, an increase from just over a tenth (13%) in 2004.

Looking at current residences (permanent plus temporary residences) the story was the same. Around one in six (17%) did not live and work in the South West and travelled from outside to do so. This was around double the proportion travelling from outside the region in 2004 (8%).

Table 5.3 shows the percentage of construction workers working outside the nation/region where they have a permanent residence. Workers from the South West were some of the least likely to work outside their own region with 15% doing so. Only those from the North West, Northern Ireland and Scotland were more likely to work in their own region.

Compared with 2004, those from the South West were around half as likely to work in other regions in 2007 (15% compared to 27% in 2004). Construction sites in the South West, 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.

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

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.

Just under a tenth (9%) of construction workers in the South West lived in temporary accommodation, a figure slightly above average (7%). This relatively high proportion may be due to the relative remoteness of parts of the region (within the UK, only Scotland, another region with relatively remote areas had as high a proportion of workers living in temporary accommodation) as well as a comparatively high level of imported workers.

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 South West were as likely as average to have spent all or most of their time in the construction industry within the region.

Those with some sort of construction specific qualification were about half as likely to have spent all of their time in the industry in the region than those without (25% of those with qualifications had not worked outside the region compared to 48% 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			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
All of it	36	41	43
Most of it	40	34	33
Around half	8	12	9
Small proportion	13	9	8
Only this job	3	N/A	3
Don't know	*	N/A	3
<i>Base: South West respondents (2007: 255; 2004: 509); Overall workforce (3,877)</i>			

5.5 Travel to work distances

The mean number of miles travelled to work (distance from home to work) was 21 miles, slightly lower than the UK and ROI average of 24 miles. Workers in the South West were more likely than average to travel less than five miles to work (33% vs. 24% for the UK/ROI). However, just over a tenth (11%) travel over 50 miles, virtually the same proportion as for 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 5.5⁴.

Table 5.5 Type of projects spent significant periods of construction career on		
	South West 2007 %	Overall Workforce (UK/ROI) 2007 %
New housing	81	73
Public non-housing	55	44
Commercial work	49	43
Private industrial	49	33
Housing repair and maintenance	42	38
Infrastructure	22	21
One type of project only	23	34
Two types of project only	18	19
Three types of project only	22	15
Four types of project only	16	12
Five types of project only	15	11
Worked on all six types of project	5	6
<i>Base: South West respondents (255); Overall workforce (3,877)</i>		

Consistent with the experienced nature of the workforce, those in the South West were more likely than average to have worked on all types of projects apart from infrastructure projects. Those in the South West were also less likely to have worked on just one type of project (23% vs. 34% across the UK and ROI).

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

5.7 Leaving the industry

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

Table 5.6 Likelihood of working in construction in five years time			
	South West 2007 %	South West 2004 %	Overall Workforce (UK/ROI) 2007 %
Definitely will	39	35	44
Very likely	37	40	32
Quite likely	14	12	10
Quite unlikely	3	2	2
Very unlikely	1	2	2
Definitely will not	1	3	2
Hope to be retired	2	N/A	2
Don't know	3	3	6

Base: South West workers aged under 60 (2007: 241; 2004: 488); All respondents aged under 60 (3,686)

The workforce in the South West appears to be as stable as that for the UK and ROI as a whole with construction site workers in the South West as likely to have said that they definitely will or are very likely to be in the industry in five years time as the overall workforce. Around three-quarters (76%) of workers fell into these two categories.