

Workforce Mobility and Skills in the UK Construction Sector

Northern Ireland Report

September 2007

Prepared for:

ConstructionSkills, Foras Áiseanna Saothair (FÁS) and COI

COI Job Number: 277046

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BMRB/SN/45105653

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Table of Contents

1	Background, Objectives and Methodology	1
1.1	Introduction	1
1.2	Key objectives of the research	1
1.3	Methodology	2
1.3.1	Desk Research	2
1.3.2	Sampling.....	2
1.3.3	Telephone survey	3
1.3.4	Site visits	3
1.3.5	Challenges.....	3
1.4	Details of sites covered in the research	3
1.5	Structure of the report.....	4
1.6	Notes on tables	4
2	Management Summary	6
2.1	The profile of the workforce.....	6
2.2	Qualifications and skills.....	7
2.3	Mobility.....	8
3	Profile, Work Status and Work Histories of the Construction Workforce	9
3.1	Demographic profile of the sample.....	9
3.2	Work status.....	11
3.3	Occupational profile	12
3.4	Years working in construction	12
3.4.1	Employment pre-construction	13
3.4.2	Occupational switching and progression.....	14
4	Qualifications and Skills	15

4.1	Construction skill cards and certificates	15
4.2	Construction qualifications held	17
4.3	Working towards construction qualifications.....	19
4.4	Managerial qualifications	20
4.5	Summary of qualification and skills card status	21
4.6	Competence/qualification level of the construction workforce	22
4.7	Self assessment of skill level	23
5	Mobility.....	26
5.1	Worker origin.....	26
5.2	Location of workplace, current and permanent residence.....	27
5.3	Temporary accommodation	29
5.4	Proportion of career spent in current location	30
5.5	Travel to work distances	30
5.6	Sub-sector mobility.....	31
5.7	Leaving the industry	32

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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 Northern Ireland.

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. The 2004 survey focused on sites valued at over £1 million and the sampling process aimed to ensure a mix of sites by stage of development (first six months, midway, last six months). In 2007 the requirement was to also sample sites under £1 million, so this criterion needed to be reconsidered in that light. The 2004 definition of stage of development clearly assumed quite large, lengthy projects, appropriate for sites with minimum value of £1 million. With the introduction of smaller sites, some would be completely finished in six months. Therefore it was decided that an appropriate alternative definition would be to select according to value.

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

Glenigan details UK-based projects only; therefore an alternative sample source was required for the ROI element of the research. The most appropriate route to the construction workforce in ROI was found to be through interviewing Safe Pass² awareness training attendees. Safe Pass is a one day safety awareness programme aimed at all who work on construction sites.

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 Northern Ireland from February to July 2007. This consisted of a total of 263 face-to-face interviews with site based workers obtained across 23 sites.

At the analysis stage, weighting was applied to the data to ensure each nation/region was represented in its correct proportions based on the relative size of the construction workforce. Labour Force Survey figures were used for UK regions/areas, (average profiles from the period October 2006 - June 2007). Unless otherwise stated, with the exception of base totals,

² The Safe Pass Health and Safety Awareness Training Programme is a one-day programme run by Floras Ásana Saothair (FÁS), the Republic of Ireland's national training and employment authority. Safe Pass aims to ensure that all construction workers in Ireland have a basic knowledge of health and safety. This is to enable them to work on construction sites without being a risk to themselves or others who might be affected by their actions.

the figures in this report are based on weighted data. Weighted, Northern Ireland accounted for approximately 3% of the UK/ROI workforce.

Figures from the site managers interviewed at the telephone fieldwork stage indicated that there were 960 workers across the 23 sites. Using this figure it would appear that around 27% of the potential workforce across the 23 sites 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 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	Qualifications 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 reporting, only results based on 15 workers or more have been referenced in either tables or the text.

2 Management Summary

This report presents the findings of a survey conducted by BMRB on behalf of ConstructionSkills, Foras Áiseanna Saothair (FÁS) and the COI. The survey in Northern Ireland consisted of interviews with 263 construction workers employed across 23 sites, taking place between February to July 2007. Quotas were set on sites in terms of the value of the construction project. A full technical report is available containing full details of sampling and methodology.

The project sought to establish reliable information on the qualification and skill levels of the UK/ROI construction workforce, and also geographic and occupational mobility.

2.1 The profile of the workforce

A wide range of occupations was covered in the research, broadly in line with the UK/ROI profile and the Northern Ireland profile in 2004, with almost half of the sample accounted for by labourers/operatives (20%), carpenters/joiners (15%) and plant/machine operatives (13%).

The age profile of Northern Ireland construction workers was in line with that across the UK/ROI, with a quarter (25%) under the age of 25 and a further quarter (25%) aged 45 and over. The entirety of the sampled workforce were male, virtually all (99%) described themselves as white (with 35% specifying white Irish), and only four workers in the sample were non-UK/ROI nationals.

Almost three in ten (27%) have worked in the construction industry for over 20 years (33% in 2004). Compared with the UK/ROI profile, workers in Northern Ireland have a greater average amount of experience; only a quarter (26%) have five years or less experience (as in 2004), compared with a third (33%) across the UK/ROI. Construction work was the first serious job after leaving full-time education for 71% of the workforce, and 89% of those for whom their current job was not their first job said they have worked in construction pretty much continuously (compared with 61% and 79% respectively for the UK/ROI overall). Two-thirds (66%) said they had always worked in the same occupational area within construction.

Seven in ten (72%) were employed directly by a company, higher than the proportion for the UK/ROI overall (64%) and in 2004 (58%). A similar proportion to the overall profile were self-employed (27% compared with 29%), this proportion was much higher in 2004 (41%). The greater part of the difference was accounted for by a lack of any agency workers in the Northern Ireland sample (compared with 5% overall and 1% in 2004).

2.2 Qualifications and skills

Over four in five (84%) of the Northern Ireland workforce possess a skill card or certificate, an increase from 64% in 2004, and much higher than the UK/ROI average of 68%. There is a considerable difference between workers with less than a year's experience of construction, a fifth (22%) of whom possess a skill card, and those with a year or more, at least four out of five of whom do so. By far the most commonly held was the CSCS/CSR card, held by 79% of the workforce; most commonly these were green (new entrant/general operative Level 1), or gold (craft/supervisor Level 3), followed by blue (skilled construction/plant operative Level 2), although a fair number were unsure as to the colour of their card.

Just under half (46%) held a relevant formal qualification, in line with the UK/ROI average and the proportion in 2004. In two-thirds (61%) of cases this was an NVQ/SVQ, followed by 25% holding City and Guilds. Those aged 20–24 were most likely to hold formal qualifications (62%), and half (48%) of those aged under 20 did so; this is a younger age profile than the UK/ROI one, where those aged over 25 were the most likely to be qualified. Carpenters/joiners (75%) and bricklayers (70%) were the most likely to have formal qualifications; labourers/operatives (8%) and plant/ machine operatives (13%) the least. One in ten (10%) were currently working towards a construction qualification, considerably lower than the UK/ROI average (17%).

A fifth of workers (18%) said they had supervisory or managerial duties on site. Two-thirds (68%) of these workers had received training designed to improve skill in this area, which was as likely to have been in-house (27%) as any industry-recognised course (27% took the Site Safety Supervisors course, and 17% took Managing Safely in the Construction Industry). This differs from the UK/ROI overall results where workers were far more likely to receive in-house training than any industry recognised course.

Two in five workers (39%) held a Level 2 competence/qualification level, with 34% attaining a higher level. These results are broadly in line with the UK/ROI average, with Northern Ireland workers being slightly less likely to have no qualifications at all (3% compared with 8%).

Nine out of ten (88%) workers believe they have all the skills they require for their current jobs, higher than the UK/ROI average (76%). Just under one in five (17%) expressed a need for training in any basic skills (for example, training in reading, writing, speaking English or maths).

One challenge to delivering training to site-based workers is the relatively short time that workers stay at one site. This is less of an issue in Northern Ireland than across the UK/ROI as a whole; 35% of Northern Ireland workers said they expected to be at their current site for more than a year (20% across UK/ROI), and almost three in five (57%) say they will be there at least six months (47% across UK/ROI), and these levels are much higher than the UK/ROI average.

2.3 Mobility

Northern Ireland has an extremely 'self-contained' workforce: 99% of the workers interviewed had their permanent residence in Northern Ireland and 92% of them were originally from Northern Ireland, higher in each case than for any other nation/region in the survey. Only 3% were in temporary accommodation, compared with 7% in the UK/ROI overall. Nine in ten (92%) had spent most or all of their construction career in Northern Ireland, compared with 76% for the UK/ROI workforce as a whole. Conversely, only 4% of the entire UK/ROI workforce comprised workers whose permanent address was in Northern Ireland, but who were working in another nation/region (overall 18% of the sample were working in a nation/region other than the one they had their permanent address in).

The average (mean) distance travelled to work was 20 miles each way, compared to a UK/ROI average of 24. However, Northern Ireland workers were less likely than average to have extremely short journeys; 14% travelled less than five miles, compared with 24% across the UK/ROI.

Construction workers in Northern Ireland were more likely than average to have only worked on one or two types of construction project (67% compared with 53% on average). Understandably this varied with length of experience, with 63% of those with up to two years' experience having only worked on one type of project, falling to 41% of those with more experience.

Three in five (61%) of workers aged under 60 said they would definitely still be working in construction in five years' time, much higher than the UK/ROI average (44%) and the proportion in 2004 (46%). Only one in twenty (5%) think it unlikely they will still be doing so.

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 Northern Ireland, and compares this to the profile in 2004 and the overall workforce interviewed in the survey.

Table 3.1 Demographic profile of the sample			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
<i>Age: 16–19</i>	8	31	8
20–24	16		16
25–34	26	26	25
35–44	25	23	25
45–54	16	13	16
55+	8	8	10
<i>Ethnicity: White – British</i>	60	99	96
White – Irish	35		2
White – other	4		1
Non-white	*		1
<i>Gender: Male</i>	100	99	99
Female	0	1	*
<i>Base: Northern Ireland respondents (2007: 263; 2004: 403); Overall workforce (3,877)</i>			

There is a broad spread of construction workers by age, with approximately one in four (25%) under 25 and a further one in four (25%) aged 45 and over. The age profile within Northern Ireland is very similar to that of the overall UK/ROI workforce. There has been no significant change in the age profile of Northern Ireland since 2004.

Virtually all (99%) of the Northern Ireland sample described themselves as white, as was the case for the UK/ROI workforce as a whole (96%), with a third (35%) specifying white Irish. Less than 1% chose any other background, with none of this sample selecting any black or Asian categories (compared with 3% of the overall UK/ROI workforce).

Predictably, the workforce interviewed was male dominated; indeed, no female workers were interviewed in Northern Ireland (only 16 female workers were interviewed across the UK/ROI).

Only a very small number (four workers) of Northern Ireland workers in the sample were non-UK/ROI nationals.

3.2 Work status

Just over seven in ten (72%) of workers interviewed were employed directly by a company, with just under three in ten (27%) self-employed. This profile differs considerably from that seen across the UK/ROI as a whole and the profile reported in 2004, with workers in Northern Ireland being considerably more likely to be directly employed. However, they were very nearly as likely to say they were self-employed as were the overall UK/ROI workforce, with the greater part of the difference accounted for by a lack of any agency workers in the Northern Ireland sample (compared with 5% overall and 1% in 2004).

	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %	Years working in construction			
				<1 year %	1-2 %	3-4 %	5+ %
Employed by a company	72	58	64	100	88	83	68
Self-employed	27	41	29	0	12	13	32
Work for an agency	0	1	5	0	0	0	0
Unemployed	0	N/A	1	0	0	0	0
Other	1	N/A	*	0	0	4	0

Base: Northern Ireland respondents (2007: 263; 2004: 403); Overall workforce (3,877)

There is a notable effect on the level of self-employment by how long people have worked in the industry. No-one in the sample with under a years experience of construction said they were self-employed, rising to just over one in ten of those with between one and five years experience, and then to around a third (32%) of those with five or more years experience. A similar correlation can be seen at the overall level, both at this survey and in 2004. As would be expected from this result, levels of self-employment tend to be higher among older workers, rising from just 5% of those aged under 20, to 28% of 20-44 year olds, to 34% of those aged 45 and over.

Analysis of levels of self-employment within occupation on site is limited because of the low base sizes within many of the occupations. However, of those occupations with comparatively large base sizes, levels of self-employment are particularly high among plasterers/dry-liners (53%), bricklayers (50%), carpenters and joiners (45%) and painters and decorators (41%), and particularly low among labourers/operatives (4%) and plant/machine operatives (6%). These last two figures are even lower than the low overall figures of 17% for labourers/ operatives and 13% for plant/machine operatives across the UK/ROI.

3.3 Occupational profile

Workers' classification of their current role or occupation are shown in table 3.3, which lists those occupations given by 1% or more of the Northern Ireland sample. Later in the report, differences are sometimes discussed by occupation; not all occupations shown are used in those discussions as many of the base sizes are too low to allow for reliable analysis. The most frequently given classification was 'labourer/general operative', accounting for one in five (20%) of the sample. Results are broadly in line with the occupational profile across the overall UK/ROI sample and comprises a slightly broader representation of trades than in 2004.

Table 3.3 Occupational Profile			
	Northern Ireland 2007 % (No.)	Northern Ireland 2004 % (No.)	Overall Workforce (UK/ROI) 2007 % (No.)
Labourer/Operative	20 (52)	17 (67)	17 (674)
Carpenter/Joiner	15 (40)	10 (40)	14 (559)
Plant/Machine Operator	13 (35)	9 (38)	13 (502)
Electrician	10 (25)	10 (42)	7 (247)
Bricklayer	9 (24)	10 (42)	13 (536)
Dry-liner/Plasterer	7 (19)	5% (19)	5 (190)
Painter/Decorator	6 (17)	3 (11)	2 (97)
Plumber	5 (14)	5 (19)	5 (183)
Supervisor	5% (13)	3 (11)	5 (192)
Roofer	3% (7)	N/A	4 (133)
Scaffolder	2 (6)	N/A	3 (112)
Manager	2 (4)	3 (12)	3 (111)
Pipe fitter	2% (4)	N/A	3 (102)
Banksman/Banksperson	1 (3)	N/A	2 (81)
Civil Engineering Operatives	1 (3)	N/A	2 (75)
Floorer	1 (2)	N/A	1 (40)
Welder	1 (2)	3 (14)	1 (32)

Base: Northern Ireland respondents (2007: 263; 2004: 403; Overall workforce (3,877))

3.4 Years working in construction

The length of time spent working in construction ranges from one in twenty (5%) of new entrants who have worked in the industry for less than a year to almost three in ten (27%) who have worked in the industry for over 20 years. Compared with the overall profile,

construction workers in Northern Ireland have a greater average length of experience of the industry; only a quarter (26%) have five years or less experience (as in 2004), compared with a third (33%) across the UK/ROI. Table 3.4 summarises these findings, showing cumulative proportions.

Table 3.4 Years spent working in construction (cumulative)			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
Less than 6 months	2	5	5
A year or less	5	8	11
2 years or less	12	18	17
5 years or less	26	26	33
10 years or less	46	41	50
20 years or less	73	67	71
More than 20 years	27	33	27

Base: Northern Ireland respondents (263); Overall workforce (3,877)

Labourers/general operatives were much more likely to be recent recruits to the industry (12% had worked in the sector for a year or less, and 23% had no more than two years' experience), indicating that people are likely to start out doing this type of work before moving on to more skilled occupations in the industry. However, there are still a considerable proportion of labourers/general operatives who have worked in the industry for many years (15% have worked in construction for over 20 years).

3.4.1 Employment pre-construction

Construction work was the first serious job after leaving full-time education for the majority of the workforce (71%), including one in five (18%) who said this work was with their current employer. The Northern Ireland workforce were more likely to say their first serious job was in construction than the average for the UK/ROI workforce overall (61%, with 11% saying it was with their current employer).

The remaining three in ten (29%) ended up in the construction industry after starting their working life in another field. This was particularly the case for labourers/operatives (56%) and plant/ machine operatives (49%). Of those who came to construction from another field, these were most commonly agricultural trades (12%), followed by transport, and elementary process plant operatives (8% each).

Since starting their first job in construction, the vast majority had only ever worked in this sector; nine in ten (89%) of those for whom their current job was not their first job said they have worked in construction pretty much continuously (compared with 79% across the UK/ROI), with a further 2% saying they have only worked in construction, but have had spells of being out of work. Overall 9% had dipped in and out of the construction sector since their

first construction job, this being particularly the case for labourer/operatives (21%) indicating that this is more common among the relatively unskilled occupations.

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.

Two-thirds (66%) of Northern Ireland workers said they had always worked in the same occupational area as their current job, slightly higher than the overall UK/ROI level of 60%.

As would be expected, those who had spent less time in construction were more likely to say they had always had the same trade, falling from 79% of those with up to two years' experience to 63% of those with five or more years in the industry.

4 Qualifications and Skills

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

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

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

4.1 Construction skill cards and certificates

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

Over four in five (84%) of the Northern Ireland workforce possess a skill card or certificate, an encouraging increase compared with the proportion in Northern Ireland who said they possessed a card or certificate in 2004 (64%). This level is also much higher than the UK/ROI average of 68% (which in turn has increased from 57% in 2004). It should be noted that one of the main skill cards in Northern Ireland (CSR) has different requirements for attainment than CSCS cards which is likely to be an influence on the higher percentage of the Northern Ireland workforce that possess a skill card in comparison to the UK/ROI average. Most CSR cards can be obtained through an occupational assessment interview set against National Occupational Standards (except scaffolding and plant cards), or through holding the relevant NVQ/SVQ. Therefore a significant proportion of CSR cards are achieved through the assessment interview route instead of the NVQ/SVQ route.

Table 4.1 shows how results vary by key demographics.

Table 4.1 Whether have a skill card/certificate by other variables		
	Northern Ireland 2007 %	Overall Workforce (UK/ROI) 2007 %
Overall	84	68
<1 year in construction	22	39
1–2 years	82	60
3–4 years	87	65
5+ years	88	75
16–19	73	43
20–24	74	62
25–44	89	73
45+	83	72
Employed directly	83	70
Self-employed	87	69
Agency worker	N/A	62
<i>Base: Northern Ireland respondents (263); Overall workforce (3,877)</i>		

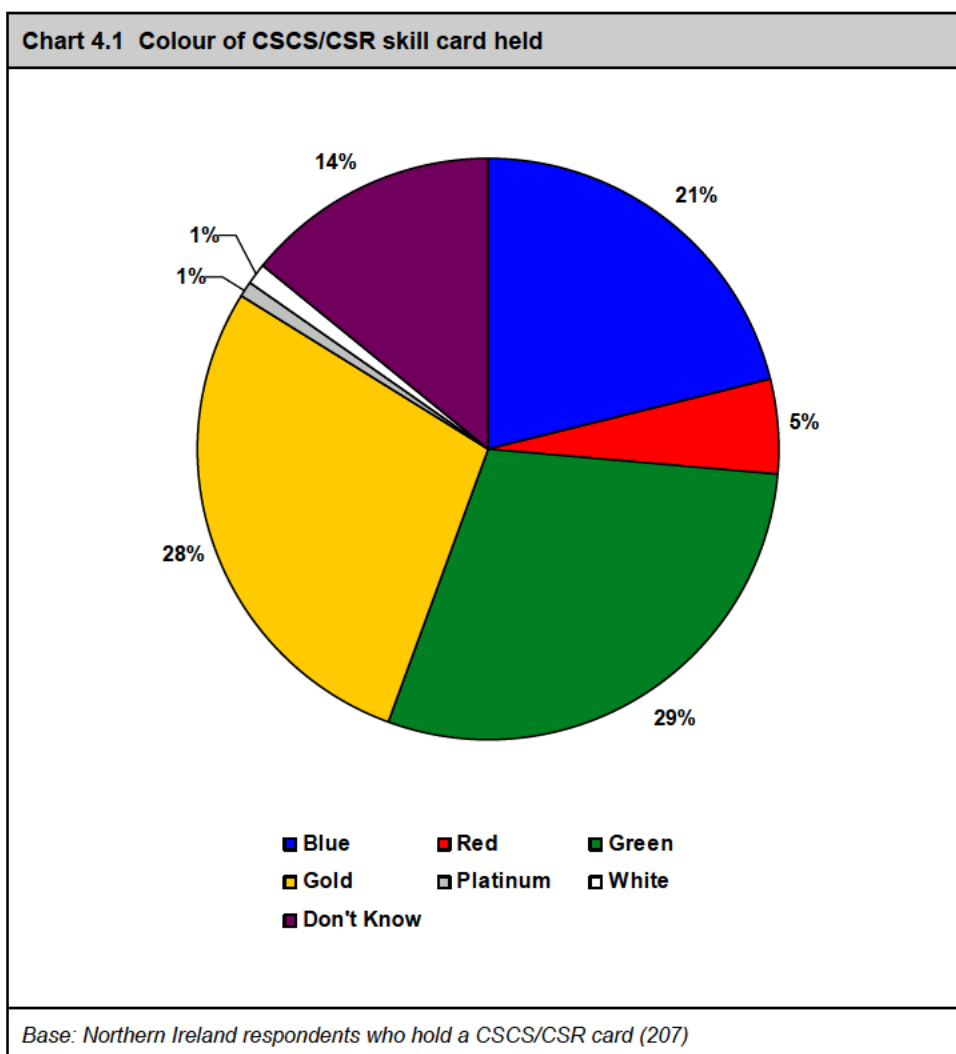
There is a considerable difference between workers with less than a years experience of construction, only one in five (22%) of whom possess a skill card/ certificate, and those with a year or more, at least four out of five of whom do so. Although a similar division is seen between those with more or less than a year in the industry across the UK/ROI as a whole, it is much more marked within Northern Ireland, and indeed those with less than a years experience in Northern Ireland are actually less likely than the UK/ROI average to possess a skill card/ certificate. This does not seem to be directly related to age, as possession of a card or certificate is more likely within each age group in Northern Ireland compared with the UK/ROI average, with the difference particularly marked for those aged 16–19.

Of those occupations with sufficient base sizes for reliable analysis, the highest penetrations of skill cards/certificates are for bricklayers (92%) and plant/ machine operatives (89%). Levels are lowest – although still comparatively high – for labourer/operatives (77%) and plasterers/dry-liners (79%).

By far the most commonly held skill certificate/card for workers in Northern Ireland was the CSCS/CSR, held by 79% of all workers (compared with 55% across the UK/ROI holding either the CSR or CSCS); the next most commonly held was the Safe-Pass, with just 4% having one of these.

Workers with a CSCS/CSR skill card were asked its colour/level. Just under three in ten held a green, general site workers card (29%), with a similar proportion having a gold, craft/supervisor NVQ/SVQ Level 3 card (28%), and two in ten (21%) possessing a blue,

skilled construction/plant operative NVQ/SVQ Level 2 card. Despite saying they held a CSR card, one in seven (14%) were not sure what colour or level it was.



4.2 Construction qualifications held

In addition to being asked to describe which skill card or certificate they held (if any), workers were also asked what other formal qualifications relevant to construction they held (excluding first aid certificates). As a relatively high proportion (6% in Northern Ireland; 8% overall) did not give an answer to this question, results in this section are based on those who gave an answer. As in 2004, just under half (46%) of Northern Ireland workers who gave an answer held a relevant formal qualification, in line with the overall average.

As with skill cards/certificates, there were differences by age and length of time worked in the industry. Again, there was a marked difference between those with less than a year's experience of construction, just 16% of whom had a qualification, and those with at least a year's experience, at least four in ten of whom did so (rising to half of those with at least three years' experience). Those aged 20–24 were the most likely to hold qualifications (62%), and half (48%) of those aged under 20 did so. This is a younger profile than the UK/ROI one, where 25–44 year olds are the most likely to be qualified. Indeed, only 18% of those aged

45+ in Northern Ireland possessed relevant formal qualifications, compared with 50% across the UK/ROI.

Table 4.2 Hold any construction specific qualification			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	46	46	48
<1 year in construction	16	6	15
1–2 years	41	31	30
3–4 years	48	N/A	39
5+ years	48	N/A	57
16–19	48	N/A	30
20–24	62	N/A	40
25–44	53	54	54
45+	18	44	50
Employed directly	43	46	48
Self-employed	58	46	54
Agency worker	N/A	N/A	30

Base: Northern Ireland respondents who gave a response 2007 (246); All Northern Ireland respondents 2004 (403); All UK/ROI respondents who gave response (3,594)

Among those occupations with sufficient base sizes for analysis, carpenters/ joiners (75%) and bricklayers (70%) were particularly likely to hold formal qualifications; at the other end of the scale were labourers/operatives (8%) and plant/machine operatives (13%).

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

Table 4.3 Main type of highest qualification held			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
NVQ/SVQ	61	24	51
City and Guilds	25	41	34
Apprenticeship	6	2	4
Construction Award	2	N/A	2
HNC/HND/BTEC higher	2	5	1
Degree	0	0	1
<i>Base: Northern Ireland respondents with qualification (2007: 112; 2004: 185); All UK/ROI respondents who gave response (1,810)</i>			

In Northern Ireland, three in five workers with a qualification have an NVQ/SVQ, which is higher than the UK/ROI average (61% vs. 51% overall), while the proportion with a City and Guilds is lower than the UK/ROI average, with a quarter (25%) holding this type of qualification (34% overall). As seen across the UK/ROI, there has been a significant switch towards NVQs/SVQs away from City and Guilds, with two in five workers (41%) with a qualification holding City and Guilds when the survey was conducted in 2004.

4.3 Working towards construction qualifications

One in ten (10%) of the Northern Ireland workforce said they were working towards a construction qualification, considerably lower than the UK/ROI average and the proportion reported in 2004 (17% respectively). As might be expected, there was a marked relationship with age on this measure, with over half (55%) of 16–19 year olds saying they were working towards a qualification, falling sharply to one in ten or fewer among older workers. This was understandably related to length of time in the industry, with half of those who had been working 1–2 years (53%) saying they were working towards a qualification.

Table 4.4 Working towards a construction specific qualification			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
Overall	10	17	17
<1 year in construction	33	68	28
1–2 years	53	59	32
3–4 years	13	39	36
5+ years	4	4	11
16–19	55	N/A	47
20–24	9		27
25+	5		12
<i>Base: Northern Ireland respondents (2007: 263; 2004: 403); Overall workforce (3,877)</i>			

In terms of the qualifications being worked towards, NVQs/SVQs were by far the most commonly cited, being mentioned by three-fifths (62%) of those working towards qualifications (although base sizes here are low and precise percentages should be treated with caution).

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 under a fifth (18%) of workers said they had supervisory or managerial duties on site. Predictably, almost all of those saying their job title was a manager or supervisor indicated this was the case, although the figure was also higher in some trades including electricians (32%) and carpenters (25%). Every one of the workers in the Northern Ireland sample who said they had supervisory or managerial duties on site had been working in construction for at least five years (23% of all those with five or more years experience).

Two-thirds (68%) of those with managerial and supervisory duties had received training designed to improve skills in this area. This is considerably higher than the proportion seen across the UK/ROI (53%) and in 2004 (35%). Across the UK/ROI as a whole, 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. This was not the case in Northern Ireland, although in-house training was as common as any industry-recognised course. The most commonly undertaken types of training (those taken by more than one respondent) are shown in table 4.5. (Note that base sizes here are low;

precise percentages should be treated with caution and it is not possible to analyse these results reliably by occupational group).

Table 4.5 Type of training received to improve management or supervisory skills			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
Have not received any training	33	65	47
In-house training	27	12	31
Site Safety Supervisors Course (for CSR)	27	N/A	7
Managing Safely in the Construction Industry (for CSR)	17	N/A	3

Base: All with management and supervisory duties Northern Ireland (2007: 48; 2004: 94); All UK/ROI respondents who gave response (678)

4.5 Summary of qualification and skills card status

Table 4.6 summarises the situation regarding qualifications and skill cards/certificates attained and working towards. The results for Northern Ireland are compared with the overall results in 2007.

Table 4.6 Qualification status		
	Northern Ireland 2007 %	Overall Workforce (UK/ROI) 2007 %
Hold a formal construction qualification or a skills card/certificate or working towards a qualification	90	82
Hold a formal construction qualification or a skills card/certificate	89	78
Hold a skills card/certificate	84	68
Hold a skills card/certificate but no other construction qualification	45	33
Working towards a qualification	10	17

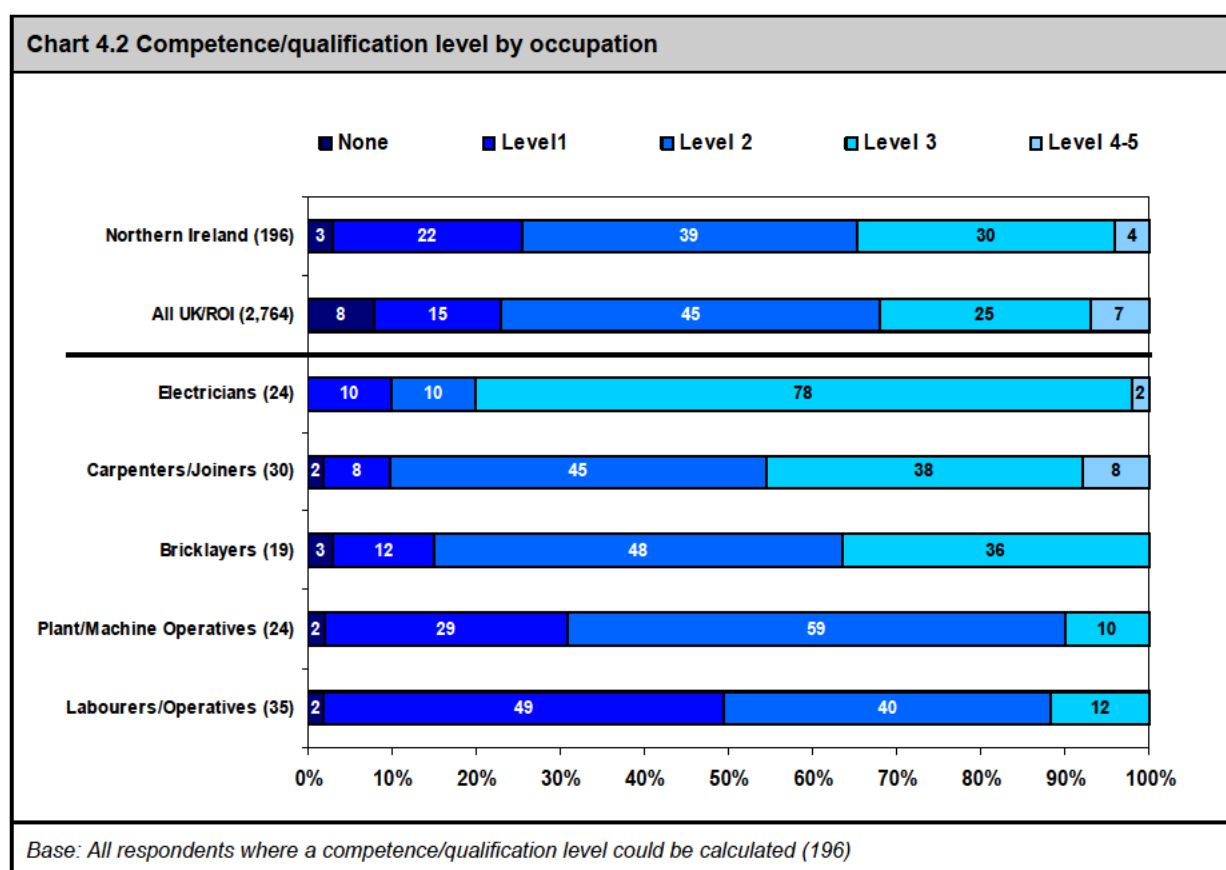
Base: Northern Ireland respondents (263); Overall workforce (3,877)

Overall, Northern Ireland workers are more likely to hold a qualification or skills card/certificate than the average across UK/ROI. Nine out of ten workers in Northern Ireland hold a formal construction qualification or skills card/certificate (89%), with a further 1% not having either but working towards a qualification. This is higher than the level of eight in ten (78%, with 4% having no qualification/certificate/card but working towards one) seen across the UK/ROI as a whole. However, almost half (45%) hold a skills card/certificate but no other qualifications, compared with a third (33%) of the overall workforce.

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 survey³.

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



Less than one in twenty (3%) of the Northern Ireland workforce had no competence/qualification level (i.e. no qualification, management training or skill cards/certificates held); this is much lower than the proportion reported in 2004 when just over a fifth of the workforce (22%) had no competence/qualification level. In 2007 a much higher proportion of the workforce had a level 1 or 2 competence/qualification level than in 2004 (62% in 2007 and 42% in 2004), with a similar proportion attaining a level 3 or above. Three in ten Northern Ireland workers (30%) had attained competence/qualification level 3 (28% in 2004) and just 4% had a level 4 or 5 (7% in 2004). These results are broadly in line with the UK/ROI average, with Northern Ireland workers being slightly less likely to have no competence/qualification level at all (3% compared with 8%).

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

Plant/ machine operatives and labourers/operatives were particularly likely to have reached no higher than Level 2 (90% and 91% respectively), whereas electricians were much more likely than average to have achieved Level 3 or higher (80%).

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 4.7 summarises the results.

Table 4.7 Self assessment of skill level and training needs for current job			
	Northern Ireland 2007 %	No skill card/ qualification/ nor working towards any 2007 %	Overall Workforce (UK/ROI) 2007 %
Have all the skills needed for current job	88	84	76
Need more training or qualifications	8	8	13
Need more experience	5	8	8
Don't know	0	0	3

Base: Northern Ireland respondents (263); No qualification nor working towards any (25); Overall workforce (3,877)

Almost nine out of ten workers (88%) believe they have all the skills they require for their current job, higher than the three-quarters of the UK/ROI workforce as a whole (76%) who said this. Those who do not are almost as likely to say they simply require more experience rather than more training or qualifications. Those in the youngest age category of 16–19 were the most likely to say they needed more qualifications (36%) or experience (14%), but still a half (50%) said they had all the skills necessary. Workers without a skill card or qualifications and not working towards any were no more likely than average to see the need for more training or experience.

Among occupation types with large enough base sizes for analysis, bricklayers and plant/machine operatives were particularly likely to say they already had all the skills they required (92% and 94% respectively).

All workers were also asked whether they felt they needed training in basic skills. Overall, just under one in five (17%) expressed a need for such training, similar to the UK/ROI average (21%). Those without construction qualifications were more likely to indicate such a need (23% compared with 11% of those with qualifications), as were younger workers (27% of those aged under 20, 17% of those aged 20+). Labourer/operatives were particularly likely to indicate a need for basic skills training (35%), in particular help in speaking English (29%).

Table 4.8 Need for training in basic skills			
	Northern Ireland 2007 %	All identifying a need 2007 %	Overall Workforce (UK/ROI) 2007 %
Any need identified	17	100	21
Speaking English	14	85	12
Reading	10	60	12
Writing	8	50	10
Maths	7	40	10

Base: Northern Ireland respondents (263); All identifying a training need (46); 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. Overall 7% say they want to change the work they do (half the overall UK/ROI level of 14%), and the large majority of these workers, equivalent to 5% of all workers interviewed, say that to achieve this aim will require further training and qualifications. There was little variation between occupational groups in the proportion who wanted to change their role, although this may be a factor of the low base sizes for these groups (differences were found at the overall UK/ROI level).

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, with results shown for Northern Ireland and UK/ROI overall.

Table 4.9 Total length of time expect to work at site		
	Northern Ireland 2007 %	Overall Workforce (UK/ROI) 2007 %
<1 month	6	11
1–3 months	18	20
>3 up to 6 months	17	16
>6 months up to a year	21	17
More than a year	35	20
Don't know	2	17

Base: Northern Ireland respondents (263); Overall workforce (3,877)

A third (35%) of Northern Ireland construction workers expect to work on their same site for more than a year, and almost three in five (57%) will be there for more than six months. These levels are much higher than those seen across the UK/ROI. Even after the 'Don't know' answers – which interestingly are many times more common across the UK/ROI than in Northern Ireland – are factored out, of those giving an answer 58% of Northern Ireland workers expect to be on site for more than six months compared with 44% across the UK/ROI.

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 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. Northern Ireland workers are also shaded (light).

Northern Ireland was by some way the nation/region where workers were most likely to have originated within the same nation/region; this was the case for nine out of ten (92%) workers, with 84% the highest proportion across the other nations/regions in the survey. One in twenty-five (4%) of the sample originally came from England, 2% from the Republic of Ireland, 1% from Scotland and 2% from outside the UK and ROI.

Workers who had been in the industry for no more than two years were less likely to have originated in Northern Ireland (71%) than those who had been in the industry for more than two years (88%). Interestingly, all those in the sample with less than two years' experience who originated outside Northern Ireland, in fact originated outside the UK and ROI entirely.

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 as their current work.

In each instance the corresponding percentages resident in different regions are shown to the left and the percentages resident in neighbouring regions to the right. However, it should be noted that 'neighbouring regions' were computed from postcode data, which were not applicable to sample from ROI; consequently there are no 'neighbouring regions' to Northern Ireland under this definition. The results from the 2004 survey are also included for comparison.

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

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

As was the case with nation/region of origin, workers in Northern Ireland were more likely than those in any other nation/region in the survey to have their permanent residence in the same nation/region; indeed, virtually all (99%) did so. The same was the case in 2004. As a corollary of this, virtually all (over 99%) said they were currently living in Northern Ireland.

Table 5.3 looks at the inverse of this, which is to say the percentage of construction workers working outside the nation/region where they have a permanent residence.

Table 5.3 Percentage working outside their nation/region of permanent or current residence		
Region of permanent address	Permanent 2007 %	Permanent 2004 %
West Midlands	31	27
London	30	35
South East	20	12
East Midlands	28	43
East of England	28	29
Yorkshire & 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>		

Just 4% of all UK/ROI construction workers who have their permanent address in Northern Ireland were working at sites outside of Northern Ireland, lower than for any other nation/region with the exception of Scotland (1%). A similar result was seen in 2004.

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 3% of Northern Ireland workers are in temporary accommodation, less than half the level seen across the UK/ROI as a whole (7%). The level was much higher among those with less experience of the industry; 14% of those with up to two years experience gave a temporary address, falling to 2% of those with over two years’ experience. Labourer/ operatives were more likely than average to be working from a temporary address (8%).

5.4 Proportion of career spent in current location

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

Table 5.4 Proportion of construction career spent in current region			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
All of it	64	52	43
Most of it	28	37	33
Around half	4	6	9
Small proportion	3	3	8
Only this job	1	N/A	3
Don't know	0	N/A	3
<i>Base: Northern Ireland respondents (2007: 263; 2004: 403); Overall workforce (3,877)</i>			

Two-thirds (64%) of Northern Ireland workers had spent their entire construction career working in Northern Ireland, and nine in ten (92%) had spent at least most of their career within the country (89% in 2004). These figures are much higher than the comparable figures for the UK/ROI workforce as a whole (43% and 76% respectively).

As would be expected, those with longer careers in construction were more likely to have spent any time working outside of Northern Ireland; only 59% of those with five or more years' experience had spent their entire construction career in Northern Ireland (compared with 83% of those with less experience), although they were just as likely as the overall result to say they had spent at least most of their career in the country (91%).

5.5 Travel to work distances

The mean average number of miles travelled to work (each way) by workers in Northern Ireland was 20 miles, compared with a mean of 24 miles across the UK/ROI, with a median average of 14 miles (17 across the UK/ROI). However, Northern Ireland workers were less likely than average to have extremely short journeys; the proportion who travelled less than five miles was lower than the comparable proportion across the UK/ROI workforce (14% compared with 24%). This may reflect the low level of workers in temporary accommodation in Northern Ireland compared with other nation/regions.

Two-thirds (65%) travelled less than 25 miles, similar to the overall UK/ROI proportion who did so (64%). One in twenty (6%) travelled over 50 miles to work (compared with 10% of the UK/ROI workforce as a whole).

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.

Table 5.5 Type of projects spent significant periods of construction career on		
	Northern Ireland 2007 %	Overall Workforce (UK/ROI) 2007 %
New Housing	82	73
Commercial work	41	43
Housing repair and maintenance	37	38
Private industrial	29	33
Public non-housing	27	44
Infrastructure	5	21
One type of project only	46	34
Two types of project only	21	19
Three types of project only	14	15
Four types of project only	6	12
Five types of project only	11	11
Worked on all six types of project	1	6
<i>Base: Northern Ireland respondents (263); Overall workforce (3,877)</i>		

Four out of five (82%) had worked on new housing projects, higher than the UK/ROI average (73%) and twice as many as had worked on commercial projects or housing repair/maintenance. At the other end of the scale only 5% had worked on infrastructure, far lower than across the UK/ROI (21%).

Workers in Northern Ireland were more likely than average to have only worked on one type of project, with nearly half (46%) saying this compared with only a third (34%) of the UK/ROI workforce; two-thirds (67%) had worked on one or two types, compared with half (53%) of the overall workforce. Understandably, this varied with length of experience in the industry; 63% of those with up to two years' experience had only worked on one type of project, falling to 41% of those with a greater length of experience. Related to this, labourer/operatives (63%) and bricklayers (54%) were particularly likely to have only worked on one type of project, as were plant/machine operatives (51%). At the other end of the scale, electricians were more likely than other occupations to have worked on five or six different types of project (40%, compared with an average of 12%).

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			
	Northern Ireland 2007 %	Northern Ireland 2004 %	Overall Workforce (UK/ROI) 2007 %
Definitely will	61	46	44
Very likely	28	30	32
Quite likely	5	20	10
Quite unlikely	1	2	2
Very unlikely	2	1	2
Definitely will not	2	*	2
Hope to be retired in 5 years	*	N/A	2
Don't know	1	1	6

Base: Northern Ireland workers aged under 60 (2007: 254; 2004: 391; All respondents aged under 60 (3,686))

Just five per cent of workers aged under 60 think it is unlikely they will be working in the industry in five years time. This is far outweighed by the majority (89%) who say they will definitely or are very likely to stay in construction, presenting a very stable picture for the industry within Northern Ireland. These results are an improvement on 2004 when just three-quarters were certain about staying, and are also more positive than seen across the UK/ROI as a whole (76% will definitely or are very likely to stay, respectively).

Workers aged 20–24 were the most likely to say they would definitely remain in construction (70%, compared with 59% of both younger and older workers), as were those with formal construction qualifications (71% compared with 57% of those without such qualifications).