

Workforce Mobility and Skills in the UK Construction Sector

South East 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 East of England.

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

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

1.2 Key objectives of the research

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

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

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

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

1.3 Methodology

The key elements of the research approach were as follows:

1.3.1 Desk research

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

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

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

1.3.2 Sampling

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

From the projects identified as being eligible for inclusion in the survey (the steps taken to select eligible records from Glenigan are detailed in the technical report), a stratified random sample of 99 postcode districts (e.g. NR2) was drawn to produce a representative sample of locations across the UK. For each selected district six eligible projects were identified. Projects were selected on the basis of value, 35% of sites with a value of less than £1million and 65% of sites with a value of more than £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 minimum value of £1 million. With the introduction of smaller sites, some would be completely finished in six months. Therefore it was decided that an appropriate alternative definition would be to select according to value.

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

1.3.3 Telephone survey

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

1.3.4 Site visits

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

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

1.3.5 Challenges

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

1.4 Details of sites covered in the research

The survey results presented in this report are based on fieldwork conducted in the South East from February to July 2007. This consisted of a total of 331 face-to-face interviews with site based workers obtained across 26 sites.

At the analysis stage, weighting was applied to the data to ensure each nation/region was represented in its correct proportions based on the relative size of the construction workforce. Labour Force Survey figures were used for UK regions/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 responses from those working in the South East accounted for approximately 12% of the UK/ROI workforce.

Figures from the site managers interviewed at the telephone fieldwork stage indicated that there were 1231 workers across the 26 sites. Using this figure it would appear that around 27% 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 the site.

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 East from February to July 2007. This consisted of a total of 331 face-to-face interviews with site based workers obtained across 26 sites.

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

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

2.1 The profile of the workforce

Construction workers interviewed in the South East were slightly older than those interviewed in the UK/ROI overall, with fewer being below 24 (16%), and more being 25–34 (30% compared with 25% overall). The profile of workers in the South East was also slightly more experienced than the UK/ROI average (33% cf. 27% had more than 20 years experience).

The South East had one of the highest proportions of self-employed workers in the UK/ROI (40% compared with 29% overall), half were employed directly by a company, while 9% worked for an agency.

A wide range of occupations was covered in the research the most prevalent being labourers (20%), bricklayers (16%) and carpenters/joiners (15%). Together these occupations accounted for around half of the construction workforce interviewed in the South East.

2.2 Qualifications and skills

The proportion of those in the South East who had either a construction skill card or certificate grew from 48% among workers in London and the South East in 2004, to 71% in 2007. This is also slightly above the UK/ROI figure of 68%. Older workers (82% of those aged 45+ had a skill card/certificate), and those employed directly by a company (78%) were most likely to hold a construction skill card/certificate.

Half of workers who gave a response (52%) had a qualification relevant to the industry – slightly higher than the reported figure for the UK/ROI overall (48%). This is an increase from 2004, when 46% of construction workers in London and the South East held a formal

² Comparative findings should be treated as indicative only due to results from workers in London and the South East being combined in 2004. There were also 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.

qualification. Those who had been in the industry for five years or more were more likely to have a qualification compared with newer recruits (61% compared with 19% of those who had worked in construction for between one and two years).

Fifty-six percent of all those who have a formal qualification have an NVQ/SVQ, making this the most common qualification held (a third, held a City and Guilds qualification).

One in ten workers in the South East were working towards a qualification, slightly lower than the proportion studying in the UK/ROI overall (17%). Younger workers who have worked in the industry for between one and four years were most likely to be working towards a qualification.

A quarter of workers in the South East said that they were supervisors or managers on-site. Forty-three percent of these managers or supervisors had received training for their role, a slight increase from 2004 when 39% of managers in London and the South East had received training. However, it was still the case that over half do not receive this type of training.

Eight in ten workers in the South East believe that they have all the skills necessary for their current job, although 17% say they need more training or qualifications (compared with 13% overall), and 3% need more experience. Predictably older workers were more likely to say that they had enough skills and experience (89% of those aged 45+ claimed to have all the necessary skills).

Looking at the need for training in basic skills (either in speaking English, reading, writing or mathematics), one in ten workers in the South East thought that training in these competencies would be useful, compared with one in five workers across the UK/ROI as a whole.

There may be some potential demand for training from those who are looking to change their roles within the industry. A fifth of workers in the South East were looking to change their roles within the construction trade, and the majority of these 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. Over a third of workers in the South East expected to be on their current site for less than six months, and three in ten think that they will stay on site for more than a year. However, workers in the South East tend to be on one site for longer than those in the UK/ROI overall, where 20% expect to stay on their current site for over a year.

2.3 Mobility

The South East had one of the lowest proportions of native workers across all regions (only London had a lower proportion) with just half of workers originating from the region. London was the most likely external source of workers (12%) in the South East. Eight percent of workers in the South East came from outside the UK and ROI – a comparatively high proportion.

Sites in London and the South East were least likely to employ workers who also lived the region (68% respectively). A quarter of workers interviewed in the South East lived in neighbouring regions, and a third came from a different region. The results are broadly similar to those reported in 2004.

The average distance travelled to work (each way) was 29 miles in the South East –higher than the UK/ROI mean of 24 miles, and the distance reported in 2004 among workers in London and the South East (23 miles). Sixteen percent were travelling over 50 miles to get to work, again higher than the reported 10% of the overall workforce.

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

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

3.1 Demographic profile of the sample

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

| Table 3.1 Demographic profile of the sample | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| <i>Age: 16–19</i> | 5 | 8 |
| 20–24 | 11 | 16 |
| 25–34 | 30 | 25 |
| 35–44 | 26 | 25 |
| 45–54 | 19 | 16 |
| 55+ | 10 | 10 |
| | | |
| <i>Ethnicity: White</i> | 96 | 96 |
| Black | 3 | 2 |
| Asian | 1 | 1 |
| Other | - | 1 |
| | | |
| <i>Gender: Male</i> | 98 | 99 |
| Female | - | * |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

The age profile of workers in the South East differs to the overall UK/ROI picture in that fewer younger workers were interviewed in the South East, (16% of workers in the South East and 24% of workers overall were aged 16–24) with workers more likely to be in the 25–34 year old age group (30% vs. 25% overall). The proportion of workers in the older age groups (45+) is very similar with the overall UK/ROI profile.

The ethnicity of workers in the South East closely matches the overall UK/ROI profile, with 96% of respondents defining themselves as white, 3% black, and 1% Asian.

Sixteen female workers were interviewed overall, though none were in the South East.

3.2 Work status

As table 3.2 shows, fewer construction workers in the South East are employed directly by a company (50%) compared with those in the rest of the UK/ROI (64%). Consequently, two-fifths of construction workers (40%) in the South East are self-employed, compared with 29% of construction workers across the UK/ROI. Agency workers represent nine percent of those in the construction industry, a slightly higher proportion than in the UK/ROI overall. One reason for these differences may be due in part to the high levels of construction-related work available in the South East, meaning that workers in the industry are more likely than those in other regions to find work on a self employed or agency basis.

| Table 3.2 Work status | | | | | | |
|-----------------------|-------------------------|--|-------------------------------|----------|----------|---------|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % | Years working in construction | | | |
| | | | <1 year % | 1–2 % | 3–4 % | 5+ % |
| Employed by a company | 50 | 64 | 39 | 50 | 55 | 50 |
| Self employed | 40 | 29 | 27 | 22 | 38 | 43 |
| Work for an agency | 9 | 5 | 30 | 11 | 7 | 7 |
| Unemployed (all ROI) | - | 1 | | | | |

Base: South East respondents (331); Overall workforce (3,877)

The level of self-employment appears to be linked to how long people have worked in the industry. Self-employment is far less common among those who have been in the industry for under a year (27%) and increases to 43% among those with five or more years' experience.

New recruits to the industry are more likely than others to work for an agency (30% of those with less than a years' experience compared with 7% of those with five or more years' experience are employed by an agency).

Results from the South East are similar to those found in London and the South East in 2004 (where 52% were employed directly by a company, 42% were self-employed, and 6% worked for an agency)³. In 2004 46% of those in the South East were self-employed – a slightly higher figure than the 40% found in 2007.

Plasterers (80%), bricklayers (63%), and carpenters (60%) were more likely than workers in other occupations to be self-employed. While labourers/operatives were among those least

³ Please note this figures are not directly comparable as results from London and the South East were combined in 2004.

likely to be self-employed (18%). These differences by occupation are similar to the results found across the UK/ROI. Agencies appear to be used mainly for labouring positions – 27% of labourers worked via an agency compared with 9% across all occupations.

Nearly three-quarters (73%) of construction workers were employed on a permanent, rather than temporary, basis. Predictably permanent employment was highest among those employed directly by a company (95%). This varied by occupation, as electricians (91%) and managers (100%) were more likely to be employed permanently, and carpenters (46%) among those least likely to be permanently employed. Similar trends by occupation were seen in figures from the UK/ROI overall.

3.3 Occupational profile

Results showing how workers classified their current role or occupation are shown in table 3.3, which lists those occupations mentioned by 1% or more of the sample. Elsewhere in the report, differences are sometimes discussed by occupation; only a small number of the occupations shown are used in those discussions as many of the base sizes are too low to allow for reliable analysis. The results are compared with overall UK/ROI profile of workers interviewed.

| Table 3.3 Occupational Profile | | |
|--|--|--|
| | South East 2007 % (No.) | Overall Workforce (UK/ROI) 2007 % (No.) |
| Labourer/General Operative | 20 (66) | 17 (674) |
| Bricklayer | 16 (54) | 13 (536) |
| Carpenter/Joiner | 15 (48) | 14 (559) |
| Plant/Machine Operative | 14 (46) | 13 (502) |
| Supervisor | 8 (26) | 5 (192) |
| Plasterer/Dry-liner | 6 (20) | 5 (190) |
| Plumber | 6 (19) | 5 (183) |
| Scaffolder | 4 (13) | 3 (112) |
| Electrician | 3 (11) | 7 (247) |
| Rofer | 3 (11) | 4 (133) |
| Manager | 3 (11) | 3 (111) |
| Painter/Decorator | 2 (6) | 2 (97) |
| Glazier | 2 (8) | 1 (32) |
| Banksman/Banksperson | 1 (3) | 2 (81) |
| Civil Engineering Operatives | 1 (3) | 2 (75) |
| Ceiling Fixer | 1 (3) | 1 (27) |
| Technical | 1 (2) | 1 (38) |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

A fifth of construction workers interviewed in the South East were labourers or operatives. Other relatively common occupations were bricklayers (16%), carpenters/joiners (15%), and plant/machine operatives (14%). The occupational profile of the South East workforce in 2007 is broadly in line with the overall UK/ROI profile

3.4 Years working in construction

The length of time spent working in construction ranges from seven percent of new entrants who have worked in the industry for less than a year, to a third (33%) having worked in the industry for over 20 years. Table 3.4 summarises findings showing cumulative proportions.

| Table 3.4 Years spent working in construction (cumulative) | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| Less than 6 months | 3 | 5 |
| A year or less | 7 | 11 |
| 2 years or less | 12 | 17 |
| 5 years or less | 27 | 33 |
| 10 years or less | 44 | 50 |
| 20 years or less | 67 | 71 |
| More than 20 years | 33 | 27 |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

The results for the South East vary little from the overall UK/ROI figures. Though it would appear that the South East profile of the workforce is slightly more experienced than the UK/ROI average (33% cf. 27% have more than 20 years experience). Labourers are more likely to be new recruits (30% have been in construction for two years or less).

3.4.1 Construction employment

Forty-four percent of construction workers in the South East have come to the construction industry from a different trade. Agency workers and temporary workers were more likely than average to have come from a different industry (63% and 57% respectively). Particular occupations, such as carpenters/joiners (67%) and bricklayers (65%), were more likely to have been in the industry since the start of their career, in line with the results from the UK/ROI overall.

Those who had worked in other fields before starting their construction careers were asked what their previous job had been. A diverse range of jobs was mentioned. In a large number of cases this was doing jobs for which construction seems like the natural progression (or indeed which are construction jobs but in other sectors).

Since starting their first job in construction, the vast majority had only ever worked in this sector, 83% reported having worked in construction continuously and a further 5% had only worked in this sector though had had spells of being out of work⁴. Overall 12% had dipped in and out of the construction sector since their first construction job. This was most likely among labourers/general operatives (24%) indicating that this dipping in and out of the industry is more common among the relatively unskilled occupations.

⁴ These results exclude workers whose first serious job is for their current employer.

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.

Three out of five workers (63%) said that they had always been in the same occupation as their current job, which is in line with the UK/ROI overall in 2007 (60%).

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 Construction Skills Certification Scheme (CSCS) and Construction Skills Register (CSR) cards, to what level
- what formal qualifications relevant to the construction industry they held or were working towards, if any
- those with managerial or supervisory duties were asked about any training specifically designed to improve their managerial or supervisory skills or knowledge.

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

4.1 Construction skill cards and certificates

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

Seven in ten workers (71%) in the South East hold some kind of industry related skill card or certificate. This is well above the figure of 48% reported for workers in London and the South East in 2004, suggesting that the industry rules around holding a card or certificate are having a genuine impact on construction workers.

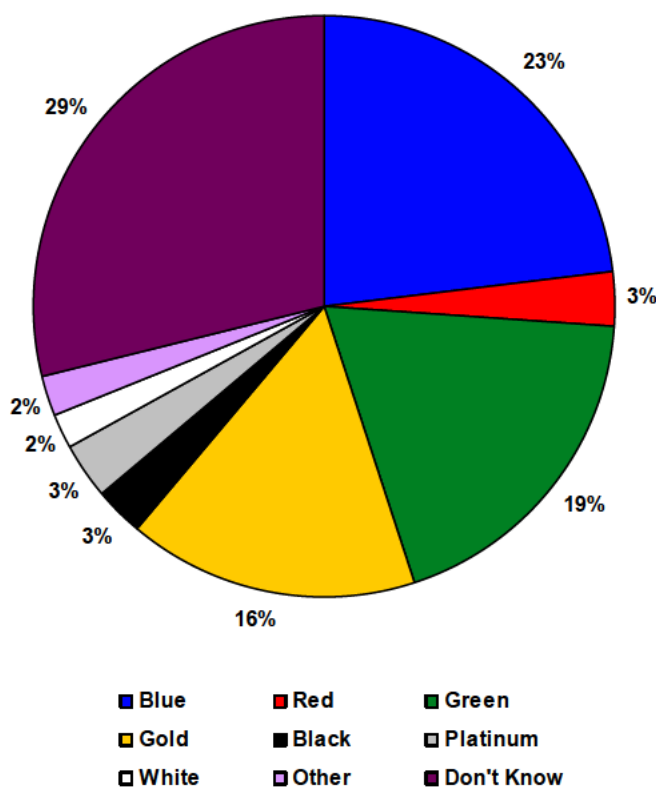
| Table 4.1 Whether have a skill card/certificate by other variables | | |
|---|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| Overall | 71 | 68 |
| < 1 year in construction | 37 | 39 |
| 1-2 years | 61 | 60 |
| 3-4 years | 48 | 65 |
| 5+ years | 77 | 75 |
| 16-19 | 25 | 43 |
| 20-24 | 58 | 62 |
| 25-44 | 74 | 73 |
| 45+ | 82 | 72 |
| Employed directly | 77 | 70 |
| Self employed | 67 | 69 |
| Agency worker | 60 | 62 |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

The proportion of workers holding a skill card or certificate in the South East is very similar to overall UK/ROI figures. The proportion of workers with a card/certificate falls to 37% among workers who have been in the industry for less than a year, and increases to 77% among those who have worked in construction for five years or more. Thus it follows that older workers are also more likely to be the recipient of qualifications or skill cards.

The occupations with the highest proportion of workers holding a skill card/certificate include supervisors (88%), and plant/machine operatives (87%). Labourers/operatives are among those least likely to hold a skills card or certificate (52%). These trends match those seen in results from the UK/ROI overall.

By far the most common card/qualification that workers held was a CSCS/CSR card, (62% of workers). We asked all those who had a CSCS/CSR card the colour of their card. A quarter (23%) indicated that they had a blue card (skilled for NVQ/SVQ Level 2 achievers or industry accreditation grade A). One in five (19%) had a green card (construction site operative card for general site workers), and sixteen percent a gold card. Three in ten workers (29%) in the South East did not know the colour of their card. Green, blue and gold cards also seem to be the most common overall in the UK/ROI, and among workers in London and the South East in 2004. Chart 4.1 shows the proportion of card-holding construction workers in the South East with each colour of card.

Chart 4.1 Colour of CSCS/CSR skill card held



Base: South East respondents who hold a CSCS/CSR card (207)

4.2 Construction qualifications held

Having been asked to describe which skill card or certificate they held (if any), workers were then asked what other formal qualifications relevant to construction they held (excluding first aid certificates). As a relatively high proportion (6% in the South East; 8% overall) did not give an answer to this question in 2007, results in this section are based on those who gave an answer. Half of workers who gave a response (52%) had a formal qualification relevant to the industry, which is slightly higher than the reported figure for the UK/ROI overall (48%). This is an increase from 2004, when 46% of construction workers in London and the South East held a formal qualification.

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

| Table 4.2 Hold any construction specific qualification | | |
|---|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| Overall | 52 | 48 |
| < 1 year in construction | - | 15 |
| 1–2 years | 19 | 30 |
| 3–4 years | 31 | 39 |
| 5+ years | 61 | 57 |
| 16–19 | 25 | 30 |
| 20–24 | 36 | 40 |
| 25–44 | 60 | 54 |
| 45+ | 48 | 50 |
| Employed directly | 51 | 48 |
| Self employed | 62 | 54 |
| Agency worker | 15 | 30 |
| <i>Base: South East respondents (311); All UK/ROI respondents who gave response (3,594)</i> | | |

Those who had been in the industry for five years or more were more likely to have a qualification compared with newer recruits (61% compared with 19% of those who had worked in construction for between one and two years), and self-employed workers were more likely to hold a qualification (62%) than those either employed directly or via an agency. Age-wise, differences in the South East were slightly more pronounced than overall figures, with those aged 25–44 most likely to have other formal relevant qualifications (60%).

Bricklayers (80%), plumbers (76%) and supervisors (76%) are among those occupations most likely to hold a construction related qualification. Results from the UK/ROI also show that workers in these occupations were among those most likely to hold a qualification.

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 | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| NVQ/SVQ | 56 | 51 |
| City and Guilds | 34 | 34 |
| Construction Award | - | 2 |
| Apprenticeship | 1 | 4 |
| HNC/HND/BTEC higher | 2 | 1 |
| Degree | - | 1 |
| <i>Base: South East respondents with qualification (161); All UK/ROI respondents who gave response (1,810)</i> | | |

Workers with a qualification were most likely to hold a NVQ or SVQ (56%) a further third (34%) had a City and Guilds qualification. Results are similar to those reported for the UK/ROI overall.

4.3 Working towards construction qualifications

Workers were asked whether they were currently working towards a qualification relevant to the construction industry. One in ten of the workforce of the South East (11%) said they were working towards a construction qualification. This is similar to the 2004 figure, when 12% of respondents in London and the South East were studying.

| Table 4.4 Working towards a construction specific qualification | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall workforce (UK/ROI) 2007 % |
| Overall | 11 | 17 |
| < 1 year in construction | 13 | 28 |
| 1–2 years | 22 | 32 |
| 3–4 years | 17 | 36 |
| 5+ years | 10 | 11 |
| 16–19 | 25 | 47 |
| 20–24 | 21 | 27 |
| 25+ | 9 | 12 |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

A slightly lower proportion of workers in the South East are working towards a qualification compared with the proportion of workers studying in the UK/ROI overall (11% cf. 17%). The pattern appears to be similar to that seen in the overall data (albeit at lower levels), with younger workers who have worked in the industry for 1–4 years most likely to be studying.

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.

A quarter (23%) of workers in the South East said that they were supervisors or managers on-site (similar to the 21% found in 2004 among workers in London and the South East). The overall figure for the UK/ROI was slightly less at 18%. Permanent staff (28%), and those employed directly by a company (29%) were more likely than average to have supervisory or managerial duties, as were those who have been in the construction trade for a longer period of time (28% of those with 5+ years of industry experience). Workers with a construction qualification are also more likely to be a manager or supervisor (34%, compared with 11% of those without a relevant qualification).

Forty-three percent of those with managerial or supervisory duties have received training for their role – lower than the 53% overall in the UK/ROI, though a higher proportion than in 2004, when 39% of managers/supervisors in London and the South East had received some training.

Those who had received some training were most likely to have undertaken in-house training (28%) rather than anything that was part of any accredited, industry recognised programme such as the Site Manager Safety Training Scheme (7%), or Chargehand and Team Leader Training (7%). The types of training undertaken are shown in table 4.5.

| Table 4.5 Type of training received to improve management or supervisory skills | | |
|---|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| None/can't remember | 57 | 47 |
| In-house training | 28 | 31 |
| Chargehand and Team Leader Training | 7 | 10 |
| SMSTS (Site Manager Safety Training Scheme) | 7 | 8 |
| Site Safety Supervisors Course (for CSR) | 3 | 7 |
| Project Management Short Courses | 4 | 3 |
| Civil engineering Site Managers Scheme | 1 | 3 |
| CSCS training | 1 | 3 |
| IOSH (Institute of Occupational Safety and Health) | 1 | 3 |
| IOSH Managing Safely for Construction Managers | 1 | 3 |
| CITB training | 4 | 3 |
| Supervisory Management Training and Development | 1 | 2 |
| CIOB Site Management Education and Training Scheme (SMETS) | 3 | 2 |
| Institute of Supervision and Management Workshops | 1 | 1 |
| <i>Base: All with management and supervisory duties South East respondents (76); All UK/ROI respondents who gave response (678)</i> | | |

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 the South East are compared with the overall results in 2007.

| Table 4.6 Qualification status | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| Hold a formal construction qualification or a skills card/certificate or working towards a qualification | 83 | 82 |
| Hold a formal construction qualification or a skills card/certificate | 80 | 78 |
| Hold a skills card/certificate | 80 | 68 |
| Hold a skills card/certificate but no other construction qualification | 31 | 33 |
| Working towards a qualification | 11 | 17 |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

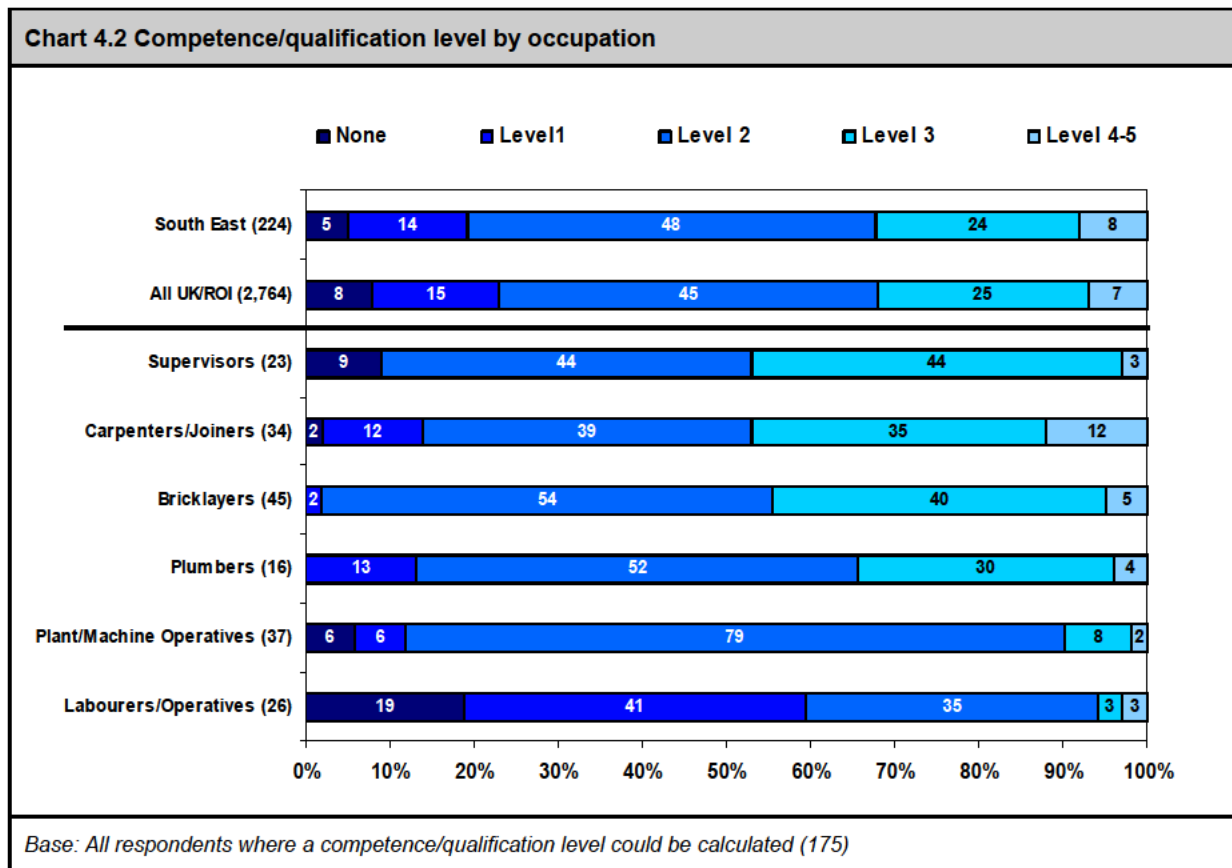
Eight in ten construction workers hold either a construction qualification, a skills card/certificate, or are working towards a qualification (83%), which is similar to the reported figure for UK/ROI overall. A higher proportion of workers in the South East hold a skills card/certificate (80%) than in the UK/ROI overall (68%).

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 survey⁵.

⁵ In 2004 Green CSCS and CSR cards were categorised as Level 2, in 2007 they were categorised as Level 1.

Chart 4.2 shows the highest competence/qualification level workers hold by qualification.



Half (48%) of workers in the South East had a level 2 qualification, with over four in five (86%) having at least at least a level 3 qualification. Results varied somewhat by occupation; labourers were the most likely to have no competence/qualification level (19%), whereas relatively high proportion of supervisors, carpenters/joiners and bricklayers had qualifications at level 3 or above. The breakdown of competence/qualification levels in the South East as a whole was very similar to the overall result across the UK/ROI.

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 | | | |
|---|----------------------------------|---|--|
| | South East 2007 % | No qualification/ nor working towards any 2007 % | Overall Workforce (UK/ROI) 2007 % |
| Have all the skills needed for current job | 80 | 79 | 76 |
| Need more training or qualifications | 17 | 20 | 13 |
| Need more experience | 3 | - | 8 |
| Don't know | 1 | 2 | 3 |
| <i>Base: South East respondents (331); No qualification nor working towards any (56); Overall workforce (3,877)</i> | | | |

Eight in ten workers in the South East believe that they have all the skills necessary for their current job, although 17% say they need more training or qualifications and just 3% needed more experience.

Predictably older workers were more likely to say that they had enough skills and experience (89% of those aged 45 and above claimed to have all the necessary skills). Bricklayers (96%) were among the occupations most likely to think that they did not need any additional training, qualifications or experience.

This proportion of workers who feel they have all the skills needed for their current job in the South East accords with the overall UK/ROI picture (76%), although there appears to be a slightly greater desire for more training and qualifications over the need for more experience in the South East.

All workers were also asked whether they felt they needed training in basic skills. Table 4.8 summarises these results.

| Table 4.8 Need for training in basic skills | | | |
|--|---------------------------------|--|--|
| | South East 207 % | All identifying a need 2007 % | Overall Workforce (UK/ROI) 2007 % |
| Any need identified | 10 | 100 | 21 |
| Reading | 5 | 54 | 12 |
| Speaking English | 5 | 48 | 12 |
| Writing | 5 | 46 | 10 |
| Maths | 4 | 35 | 10 |
| <i>Base: South East respondents (331); All identifying a training need (33); Overall workforce (3,877)</i> | | | |

One in ten workers in the South East identified a need for training in basic skills that would help with their job, this compares to one in five workers (21%) across the UK/ROI. As with the overall figures, people needing training in reading, speaking English, writing and maths are fairly evenly spread.

Migrant workers were more likely than UK/ROI nationals to identify a need for training in basic skills – 35% identified a need compared with 6% of UK/ROI nationals. A relatively high proportion of non-UK/ROI nationals identified a need for help with speaking English (27% of all non-UK/ROI nationals).

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 as a result. One in five workers said they wanted to change their trade within the construction industry. This figure is a slight increase from 2004, when 15% of workers in London and the South East indicated that they would like to change the work they do.

A desire to change jobs was particularly evident among workers with unskilled occupations such as labourers, where two in five (39%) wanted to change the work they did within the industry. These trends were also seen in results from the UK/ROI overall.

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 East, and overall.

| Table 4.9 Total length of time expect to work at site | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| < 1 month | 12 | 11 |
| 1-3 months | 13 | 20 |
| >3 up to 6 months | 12 | 16 |
| >6 months up to a year | 23 | 17 |
| More than a year | 29 | 20 |
| Don't know | 11 | 17 |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

Twelve percent of construction workers expect to be on their current site for less than a month, with just over a third (38%) thinking that they will be on site for less than six months. Twenty-nine percent of construction workers predict that they will be on their current site for more than a year.

Workers in the South East region appear to be slightly more likely to spend longer on sites when compared with figures from the UK/ROI overall (29% expect to be on site for more than a year compared with 20% overall).

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 East workers are also shaded (light).

Just half (49%) of those working on construction sites in the South East also come from the region originally. This makes the South East the second largest 'net importer' of construction workers behind London. London was the most likely external source of workers (12%) in the South East, which is not surprising given its close proximity to the region.

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 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 The 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)

Sites in London and the South East were least likely to employ workers who also lived the region (68% respectively). A quarter of workers interviewed in the South East (24%) lived in neighbouring regions, and a third (32% – a comparatively high proportion) came from a different region. The results are broadly similar to those reported in 2004.

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

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

A fifth of workers (20%) living in the South East work outside the region of their permanent residence. This is a higher proportion than in 2004, when the figure was 12%. This measure varied widely by nation/region, and not surprisingly the more geographically isolated areas of Scotland and Northern Ireland had very few workers who live there while working outside the geographical area.

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. Ninety-five percent of workers gave their permanent address when asked, and only five percent a temporary one, indicating that nearly all workers in the South East can get from their permanent home to work on a daily basis.

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 summarises these results.

| Table 5.4 Proportion of construction career spent in current region | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| All of it | 48 | 43 |
| Most of it | 34 | 33 |
| Around half | 6 | 9 |
| Small proportion | 8 | 8 |
| Only this job | 3 | 3 |
| Don't know | 1 | 3 |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

Nearly half of workers in the South East (48%) have spent all of their time on sites in the region, and a further third (34%) have spent a majority of their time on sites there. These results are very similar to those found overall.

Those working for national employers were somewhat more likely to be mobile and to have worked in other regions (just 32% have always worked in the same region), which reflects the fact that these employees are more likely to be sent where the work is. Those working for a local employer were more likely to stay in the South East all of the time (61%).

Mobility defined in these terms also varied by occupation. Plumbers (84%) and labourers (61%) were most likely to have spent all their construction careers in the South East.

5.5 Travel to work distances

The mean number of miles travelled to work (each way) was 29 miles, higher than the UK/ROI mean of 24 miles and the distance reported in 2004 among workers in London and the South East (23 miles). Workers in the South East were less likely than average to travel less than five miles to work (16% vs. 24% for the UK/ROI), and 16% were travelling over 50 miles to get to work compared with 10% of the overall workforce.

Electricians were most likely to travel furthest to work, with a mean of forty-one miles between their home and the site, whereas labourers and bricklayers generally lived closer to the site (living an average of 20 and 23 miles away respectively).

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 | | |
|---|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| New housing | 95 | 73 |
| Commercial work | 44 | 43 |
| Housing repair and maintenance | 44 | 38 |
| Public non-housing | 42 | 44 |
| Private industrial | 31 | 33 |
| Infrastructure | 20 | 21 |
| One type of project only | 30 | 34 |
| Two types of project only | 24 | 19 |
| Three types of project only | 12 | 15 |
| Four types of project only | 15 | 12 |
| Five types of project only | 13 | 11 |
| Worked on all six types of project | 6 | 6 |
| <i>Base: South East respondents (331); Overall workforce (3,877)</i> | | |

Nearly all workers in the South East (95%) have spent significant periods of their time on new housing – considerably higher than the national average of 73%. Thirty percent had only worked on one type of project.

The majority of workers had spent significant parts of their career across different types of project, only 30% had worked within one type of sub-sector only. These results are very much in line with the UK/ROI overall.

Predictably newer recruits to the industry were more likely to have only worked on one type of project (67% of those who have been in construction for less than a year compared with 23% of those who have been in construction for more than five years).

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 5 years time | | |
|--|----------------------------------|--|
| | South East 2007 % | Overall Workforce (UK/ROI) 2007 % |
| Definitely will | 40 | 44 |
| Very likely | 36 | 32 |
| Quite likely | 11 | 10 |
| Quite unlikely | 1 | 2 |
| Very unlikely | 4 | 2 |
| Definitely will not | 3 | 2 |
| Hope to be retired in 5 years | 2 | 2 |
| Don't know | 2 | 6 |
| <i>Base: South East workers aged under 60 (322); All respondents aged under 60 (3,686)</i> | | |

Ten per cent of workers aged below 60 think it is unlikely they will be working in the industry in five years time, with around three quarters saying it is definite (40%) or very likely (36%) they will stay. These results are very similar to those for the UK/ROI as a whole. Less skilled professions (e.g. plant/machine operatives, 28%) are among the least likely occupations to say that they will definitely be in the construction industry in five years' time.