

Workforce Mobility and Skills in the UK Construction Sector

London 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 London.

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 £1million. In 2004, the survey focused on sites valued at over £1 million and the sampling process aimed to ensure a mix of sites by stage of development (first six months, midway, last six months). In 2007 the requirement was to also sample sites under £1 million, so this criterion needed to be reconsidered in that light. The 2004 definition of stage of development clearly assumed quite large, lengthy projects, appropriate for sites with 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 London from February to July 2007. This consisted of a total of 355 face-to-face interviews with site-based workers obtained across 21 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 London data accounted for approximately 9% of the UK/ROI workforce.

Figures from the site managers interviewed at the telephone fieldwork stage indicated that there were 923 workers across the 21 sites. Using this figure it would appear that around 38% of the potential workforce took part in the research, however it should be noted that there were instances where on the day the site was visited many fewer workers were present than indicated by the site manager when first contacted. This was due to a number of factors, for example the site may have entered into another phase of the project by the time the interviewer was able to visit it.

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 London from February to July 2007. This consisted of a total of 355 face-to-face interviews with site-based workers obtained across 21 sites.

Where available, results from the 2007 survey have been compared with those from similar previous research conducted by IFF Research in 2004².

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

2.1 The profile of the workforce

The age profile of construction workers interviewed in London was very similar to the profile of the workforce interviewed across UK/ROI, with 25–34 year olds making up the largest proportion of workers (29%).

London has the highest proportion of workers who would describe themselves as black or minority ethnic (BME) origin (10%) when compared with other regions – the overall figure is 4%.

A wide range of occupations was covered in the research, the most prevalent being labourers/general operatives (17%), carpenters/joiners (14%), and bricklayers (10%). Together these accounted for two-fifths (41%) of the total workforce.

London had the highest proportion of self-employed workers in the UK (55%) compared with any other nation/region (the figure was 29% overall). Two in five construction workers in London were employed directly by a company, and 5% worked for an agency.

2.2 Qualifications and skills

Seven in ten construction workers in London (72%) hold some kind of skill card or certificate. This is marked increase from 2004 when 48% of the workforce in London and the South East reported having a skill card or certificate. Older workers are more likely to have a skills card/certificate (79% of those aged 45+), as are those who have been in the industry five years or more (78%).

² Comparative findings should be treated as indicative only as in 2004 results from London and the South East region were combined. Variations will also occur 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.

Over a third (36%) of workers in London who gave a response hold a formal qualification relevant to the industry, compared with 43% overall. Again there were predictable differences by age (46% of those aged 45+) and length of time worked in the industry (47% of those with more than five years in construction have a qualification).

Fifty-seven percent of all those who have a formal qualification have an NVQ/SVQ, making this the most common qualification held (30%, held a City and Guilds qualification).

Just 16% of workers in the South East said that they were supervisors or managers on-site. Around half of these workers (54%) said that they had ever received any training designed to improve their managerial or supervisory knowledge or skills, which compares favourably with 2004 when 39% of managers/supervisors in London and the South East had received training. However, it was still the case that nearly half have not received any training. The most common form of management/supervisory training continues to be in-house as opposed to more formal, industry-recognised training.

The proportion of the workforce that were working towards a construction qualification (most commonly an NVQ or SVQ) was 15%, around the same level as for the UK and ROI overall (17%).

Three quarters of construction workers (77%) in London said that they had all the skills necessary for their current job, though one in ten (11%) identified a need for more training or qualifications, and nine percent for more experience.

A quarter of construction workers in London (24%) identified a need for training in basic skills (either in speaking English, reading, writing or mathematics), which is similar to the overall figure (21%). This need was higher among non-UK/ROI nationals (50%), and among younger workers (32% of those aged 16–24 identified a need for training in basic skills).

There may be some potential demand for training from those who are looking to change their roles within the construction industry. One in five workers (19%) in London said they would like to change the work they do and the majority of these (71%) said that they would need further training and qualifications for their prospective new role.

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. London construction workers appear to spend less time on site than those in the UK/ROI overall, with 57% expecting to be on site for six months or less (compared with 47% overall), and seven percent for over a year (compared with 20% overall).

2.3 Mobility

London had the lowest proportions of native workers across all nations/regions, with just a third of workers originating from the region. Countries outside the UK/ROI were the most likely external source of workers (22%), followed by the South East (15%) and the East of England (9%).

Sites in London and the South East were least likely to employ workers who also lived the region (68% respectively). Compared with other regions, London was among the regions most likely to have a higher than average proportion of the construction workforce not living in the region (30% lived in either the South East or East of England).

The mean average number of miles travelled to work in London was 24 miles (the same as the figure for the UK/ROI overall). A quarter of workers in London reported travelling less than five miles to their place of work.

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 London and compares this to the overall workforce interviewed in the survey.

Table 3.1 Demographic profile of the sample		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
<i>Age: 16–19</i>	5	8
20–24	18	16
25–34	29	25
35–44	24	25
45–54	16	16
55+	8	10
<i>Ethnicity: White</i>	90	96
Black	4	2
Asian	6	1
Other	-	1
<i>Gender: Male</i>	99	99
Female	<1	<1
<i>Base: London respondents: (355); Overall workforce (3,877)</i>		

There is a broad spread of construction workers by age, with one in four under 35, and another one in four aged 45 plus. The age profile in London was very similar to that found among the site-based construction workforce across UK/ROI as a whole, though with a slightly higher proportion of 20–34 year olds (47% compared with 41%).

Ten per cent of construction workers interviewed in London were of black or minority ethnic (BME) origin (the same as among workers in London and the South East in 2004). Unsurprisingly, London has the highest proportion of BME workers when compared with other regions. BME workers are under-represented in the London construction workforce; data from the Labour Force Survey (Spring 2007) indicates that overall, 33% of London residents are of BME origin.

Only one female worker was interviewed in London (just 17 were interviewed overall), representing just 0.4% of the total sample.

3.2 Work status

As table 3.2 shows, fewer construction workers in London are employed by a company (40%) compared with those in the rest of the UK/ROI (64%). Consequently, over half of construction workers (55%) in London are self-employed, compared with just 29% of construction workers across the UK/ROI. London has the highest proportion of self-employed construction workers than any other region in the UK/ROI. Agency workers represent five percent of those in the construction industry, the same proportion as in the UK/ROI overall.

Table 3.2 Work status						
	London 2007 %	Overall Workforce (UK/ROI) 2007 %	Years working in construction			
			<1 year %	1–2 %	3–4 %	5+ %
Employed by a company	40	64	49	32	27	41
Self-employed	55	29	43	59	68	54
Work for an agency	5	5	9	5	5	5
Unemployed (all ROI)	0	1				

Base: London respondents (355); 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 (43%). Three in five workers (59%) who have been in the industry between one and two years are self-employed (slightly higher than average), and the figure peaks at 68% for those who have worked in construction for between three and four years. The proportion then levels off for those with five or more years' experience (54%).

UK/ROI nationals were more likely to be employed directly by a company (44%) than non-UK/ROI nationals (30%), with non-UK/ROI nationals more likely to be self-employed (60%).

As in the overall UK/ROI figures, self-employment was highest among those aged 20–44 (60%), dropping off to 44% among those aged over 45.

London workers in particular occupations are more likely to be self-employed than others, as summarised in table 3.3. These occupations are similar to those most likely to be self-employed across the UK/ROI.

Table 3.3 Level of self-employment by occupation	
High 2007	Low 2007
Plasterers/Dry-liners (87%)	Scaffolders (25%)
Bricklayers (82%)	Managers (25%)
Carpenters/Joiners (68%)	Plumbers (36%)

Over two-thirds (69%) of construction workers in London are employed on a permanent basis, with 30% employed temporarily. Unsurprisingly a large proportion of those who are employed directly by a company have a permanent role (86%), though still over half of self-employed workers (58%) are employed on a permanent basis. Roofers, plant/machine operatives and scaffolders are among the occupations most likely to have a permanent role (81%, 89% and 89% respectively).

3.3 Occupational profile

Results showing how workers classified their current role or occupation are shown in table 3.4, 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. Generally the occupational profile of workers interviewed in London is similar to those in the UK/ROI as a whole, as illustrated in table 3.4. (Due to small base sizes, conclusions cannot be drawn from differences in occupational profiles between London and overall.)

Table 3.4 Occupational Profile		
	London 2007 % (No.)	Overall Workforce (UK/ROI) 2007 % (No.)
Labourer/Operative	17 (61)	17 (674)
Carpenter/Joiner	14 (50)	14 (559)
Bricklayer	10 (34)	13 (536)
Electrician	9 (33)	7 (247)
Scaffolder	8 (28)	3 (112)
Plumber	7 (25)	5 (183)
Roofer	6 (21)	4 (133)
Plant/Machine Operative	5 (17)	13 (502)
Steel Erector/Rigger	5 (19)	2 (75)
Supervisor	3 (10)	5 (192)
Plasterer/Dry-liner	4 (15)	5 (190)
Pipe Fitter	3 (12)	3 (102)
Banksman/Banksperson	2 (7)	2 (81)
Floorer	2 (7)	1 (41)
Manager	1 (4)	3 (111)
Painter/Decorator	1 (4)	2 (97)
Welder	1% (5)	1 (32)
Ceiling Fixer	1 (4)	1 (27)
Specialist Building Operative	1 (5)	<1 (16)

Base: London respondents (355); Overall workforce (3,877)

3.4 Years working in construction

Workers were asked how long they had been in the construction industry. The results, along with the overall results for UK/ROI workers, can be seen in table 3.5.

Table 3.5 Years spent working in construction (cumulative)		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
Less than 6 months	2	5
A year or less	10	11
2 years or less	16	17
5 years or less	34	33
10 years or less	54	50
20 years or less	74	71
More than 20 years	26	27

Base: London respondents (355); Overall workforce (3,877)

Just one in ten workers in London have been in the industry for a year or less, while the vast majority (72%) have worked in construction for over five years, and a quarter (26%) have been in construction for more than 20 years. These figures suggest that once workers have a job in the industry, a large proportion stay in the trade for the long-term.

Construction industry experience in London is broadly in line with the profile of workers in the whole of the UK/ROI.

Labourers were most likely to be new recruits to the industry (a quarter of labourers had worked in the sector for a year or less).

3.4.1 Construction employment

Three in five construction workers (62%) in London started their career in the construction industry. By occupation, bricklayers and carpenters were among those most likely to have been in the industry since the start of their working lives (74% and 76% respectively).

Thirty-seven percent of construction workers in London came to construction after working in other fields. Labourers were more likely than average to have worked in another field prior to starting in construction (44%).

Workers who had not been working in construction very long (63% of those with less than a year's experience) were most likely to have started working in construction after working in another field.

Since starting work in construction, the majority (82%) of London construction workers say that they have 'worked in construction pretty much continuously', with 10% having done other

sorts of jobs, and 6% have only worked in construction but have had times where they have been out of work³. Skilled occupations including carpenters, steel erectors/riggers, and supervisors are among those who are more likely to have worked continuously in construction (95%, 95% and 100% respectively).

Those with a qualification and skill card are more likely to have worked continuously in construction (92%) compared with those with no qualification or skills card (73%).

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 worked in the same occupational area as their current job, which is in line with the UK/ROI overall (60%). Electricians (70%) were among the most likely occupations to have always had the same trade.

Of those who have had a job in a different area of construction, workers were most likely to have been labourer/operatives (10%).

³ These results exclude workers whose first serious job is for their current employer.

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 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 construction workers in London (72%) hold some kind of skill card or certificate. This compares with 48% of construction workers in London and the South East reporting they had a skill card or certificate in 2004, so figures suggest that card/certificates held has increased strongly. The proportion of workers holding a card/certificate varied by a number of factors including age and years worked in the industry (see table 4.1).

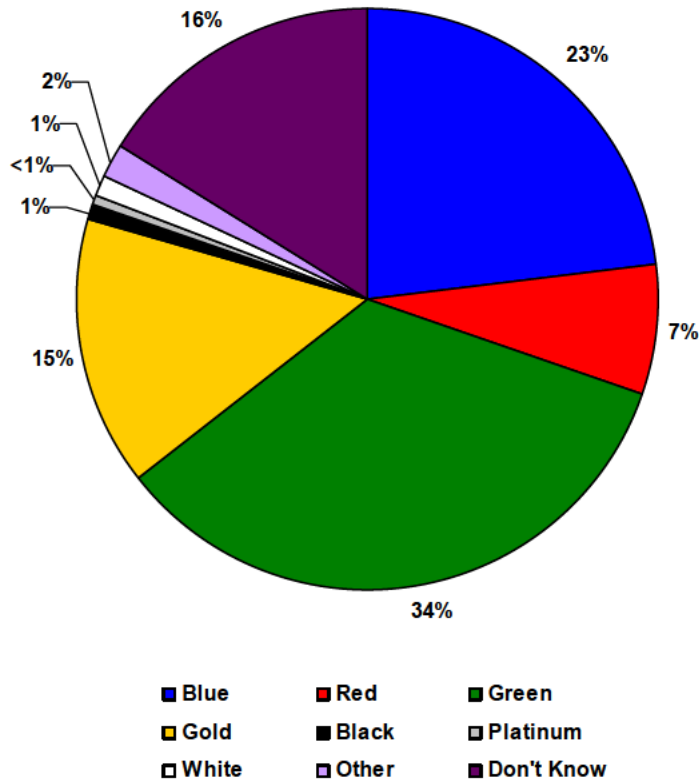
Table 4.1 Whether have a skill card/certificate by other variables		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
Overall	72	68
<1 year in construction	40	39
1–2 years	55	60
3–4 years	66	65
5+ years	78	75
16–19	63	43
20–24	64	62
25–44	72	73
45+	79	73
Employed directly	72	70
Self-employed	71	69
Agency worker	78	62
<i>Base: London respondents (355); Overall workforce (3,877)</i>		

Predictably those with less than a year's experience in the industry (40%) were much less likely than average to have a skills card or certificate. Interestingly, this doesn't appear to be linked with age, as 16–19 year old construction workers in London were more likely than those living elsewhere to have a skills card or certificate (63% compared with 43% of those in the UK/ROI overall).

In London, base sizes are too small to provide reliable comparisons between most of the individual occupations, though the figures do indicate that bricklayers (59%) are among the least likely occupations to have a skill card/certificate and steel erectors/riggers (95%), and plant/machine operatives (94%) are more likely than average to hold a card or certificate.

Three in five construction workers (64%) have a CSCS/CSR card. The most common card held was a green card (construction site operative card for general site workers), held by just over a third of those who had a card (34%). A quarter (23%) had a blue card (skilled for NVQ/SVQ Level 2 achievers or industry accreditation grade A), 15% had a gold card (craft/supervisor card for NVQ/SVQ Level 3 achievers or industry accreditation grade B). A relatively high proportion (16%) of respondents in London did not know the colour of their card. Chart 4.1 shows the proportions with each colour of card.

Chart 4.1 Colour of CSCS/CSR skill card held



Base: London respondents who hold a CSCS/CSR card (228)

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 (7% in London; 8% overall) did not give an answer to this question, results in this section are based on those who gave an answer.

Over a third (36%) of workers in London who gave a response hold a formal qualification relevant to the industry, compared with 43% overall in the UK/ROI. As with skill cards/certificates, there were predictable differences by age and length of time worked in the industry.

Table 4.3 Hold any construction specific qualification		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
Overall	36	48
<1 year in construction	6	15
1–2 years	15	30
3–4 years	13	39
5+ years	47	57
16–19	21	30
20–24	21	40
25–44	38	54
45+	46	50
Employed directly	39	48
Self-employed	35	54
Agency worker	28	30
<i>Base: London respondents who gave a response (355); All UK/ROI respondents who gave response (3,594)</i>		

Those with more experience in the construction industry are the most likely to have a relevant qualification (nearly half, 47%, of those with more than five years in construction have a qualification). This corresponds with age as a higher proportion of older workers (46% of those aged 45+) also hold a construction-specific qualification.

In contrast to the UK/ROI as a whole, workers in the London area are equally likely to hold a relevant qualification, be they an employee or self-employed. While Agency workers are least likely to have formal qualifications as seen in the UK/ROI overall (28% and 30% respectively).

The proportion of workers in London in 2007 with a qualification is lower than in 2004, when 46% of those in London and the South East had a construction-specific qualification.

Low base sizes make comparisons between individual occupations and their likelihood to have a qualification difficult, yet figures indicate that steel erectors/riggers (95%), and plant/machine operatives (94%) are most likely to have a construction-specific 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 4.5 Main type of highest qualification held		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
NVQ/SVQ	57	51
City & Guilds	30	34
Construction Award	2	2
Apprenticeship	6	4
HNC/HND/BTEC higher	1	1
Degree	-	1
<i>Base: London respondents with qualification (119); All UK/ROI respondents who gave response (1,810)</i>		

NVQs/SVQs were the most common qualification that workers held by some margin, with 57% having such a qualification. The most common being an NVQ/SVQ Level 2, which was held by 13% of construction workers. Three in ten workers had a City and Guilds qualification. These results are comparable those seen at the UK/ROI level.

4.3 Working towards construction qualifications

Fifteen percent of the workforce said they were working towards a construction qualification (similar to the 17% who were working towards a qualification in the UK/ROI overall). Predictably this was much higher among younger workers and those who had been working in the industry for less than five years, as table 4.6 shows.

Table 4.6 Working towards a construction specific qualification		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
Overall	15	17
<1 year in construction	40	28
1–2 years	9	32
3–4 years	17	36
5+ years	12	11
16–19	42	47
20–24	17	27
25+	13	12
<i>Base: London respondents (355); Overall workforce (3,877)</i>		

Two in five construction workers (42%) aged 16–19 are studying for a qualification, this drops to 17% among 20–24 year olds. This is similar to the pattern found among workers in London and the South East in 2004, when 45% of 16–17 year olds were studying, and 9% of those over 25 were working towards a qualification.

In terms of the type of qualifications being worked towards, NVQs/SVQs were most common, mentioned by 67% of those working towards a qualification (most of these were level 2 qualifications). Fifteen percent of workers interviewed in London are working towards a City and Guilds qualification (slightly higher than the national figure of 7%).

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.

Sixteen percent of construction workers questioned in London said that they were a supervisor or manager on site. Predictably, those with more experience in the industry were more likely to have a supervisory/managerial role (20% of those who had been in the industry for 5+ years). Related to this, older workers (19% of those aged 25+), and those with a construction qualification (23%), were more likely to have supervisory or managerial duties.

Just over half of these managers or supervisors (54%) have received some kind of training for their role. This is an increase from 2004 when 39% of managers/supervisors in London and the South East had received training.

Those who had received some training were most likely to have undertaken in-house training (32%) rather than anything that was part of any accredited, industry recognised programme. The types of training undertaken are shown in table 4.7.

Table 4.7 Type of training received to improve management or supervisory skills		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
None/can't remember	46	47
In-house training	32	31
Chargehand and Team Leader Training	11	10
Assessor and Verifier Training	9	5
SMSTS (Site Manager Safety Training Scheme)	5	8
Site Safety Supervisors Course (for CSR)	5	7
IOSH (Institute of Occupational Safety and Health)	5	3
Managing Safely in the Construction Industry (for CSR)	5	3
Supervisory Management Training and Development	4	2
Project Management Short Courses	2	3
Civil engineering Site Managers Scheme	2	3
CIOB Site Supervisor (First Line Supervisor – FLS)	2	2
CSCS training	2	1
IOSH Safely for Senior Executives	2	N/A
Safety for Senior Executives (for CSR)	2	N/A

Base: All with management and supervisory duties London (56); All UK/ROI respondents who gave response (678)

4.5 Summary of qualification and skills card status

Table 4.8 summarises the situation regarding qualifications and skill cards/certificates attained and working towards. The results for London are compared with the overall results.

Table 4.8 Qualification status		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
Hold a formal construction qualification or a skills card/certificate or working towards a qualification	80	82
Hold a formal construction qualification or a skills card/certificate	76	78
Hold a skill card/certificate	72	68
Hold a skill card/certificate but no other construction qualification	43	33
Working towards a qualification	15	17

Base: London respondents (355); Overall workforce (3,877)

The qualification status of construction workers in London is similar to that of the overall UK/ROI construction workforce, with four-fifths of workers either holding a formal qualification, skill card, or working towards a qualification. Fifteen percent are currently working towards a qualification, which is similar to the 2004 figures from London and the South East (12%).

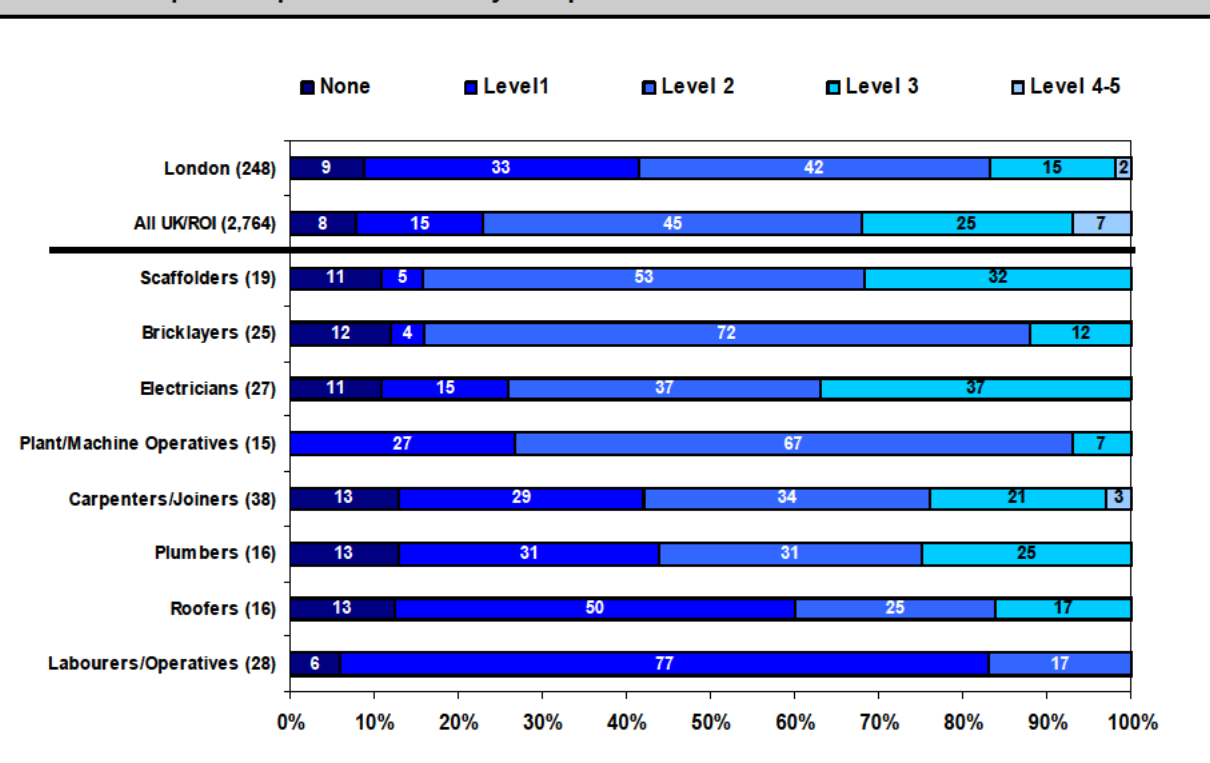
4.6 Competence/qualification level of the construction workforce

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 survey⁴.

Around three in five construction industry workers (59%) have a qualification at level 2 or above, as chart 4.2 shows.

⁴ In 2004 Green CSCS and CSR cards were categorised as Level 2, in 2007 they were categorised as Level 1.

Chart 4.2 Competence/qualification level by occupation



Base: All respondents where a competence/qualification level could be calculated (248)

4.7 Self Assessment of skill level

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

Table 4.9 Self assessment of skill level and training needs for current job			
	London 2007 %	No skill card/ qualification/ nor working towards any 2007 %	Overall Workforce (UK/ROI) 2007 %
Have all the skills needed for current job	77	75	76
Need more training or qualifications	11	16	13
Need more experience	9	8	8
Don't know	3	2	3

Base: London respondents (355); No skill card/qualification nor working towards any (63); Overall workforce (3,877)

As the table shows, results among construction workers in London are very similar to those among the UK/ROI as a whole. Just over three-quarters (77%) of construction workers feel

that they have all the skills they need for their current job. Workers with no skill card/qualifications, and not working towards any qualifications, were no more likely than average to see the need for more training or qualifications.

All workers were also asked whether they felt they needed training in basic skills. Table 4.10 shows whether people think they needed more training in these areas.

Table 4.10 Need for training in basic skills			
	London 2007 %	All identifying a need 2007 %	Overall Workforce (UK/ROI) 2007 %
Any need identified	24	100	21
Speaking English	15	64	12
Reading	14	57	12
Writing	12	52	10
Maths	8	33	10

Base: London respondents (355); All identifying a training need (86); Overall workforce (3,877)

Overall, a quarter of construction workers in London (24%) identified a need for more training, with broadly equal demand for reading (14%), writing (12%) and speaking English (15%).

Several factors appeared to impact on whether workers felt they needed some basic training. Thirty-two percent of those aged 16–24 identified a need for training in basic skills compared with 19% of their older counterparts (those aged 45+). A need for training was higher among non-UK nationals (particularly in speaking, reading and writing English), with half (50%) saying that some training was needed, compared with 14% of UK/ROI nationals. Unsurprisingly non-UK nationals were most likely to feel they needed training in speaking English (34%).

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 this needing re-training. One in five workers (19%) would like to change the work that they do, this is similar to the overall proportion in the UK/ROI.

Labourer/operatives (41%) are among those most likely to want to change their job. Workers who wanted to change their job were most likely to want to move to managerial roles, with 28% of those wanting to change naming this their occupation of choice. Plumbers (14%), electricians (10%) and supervisory roles (9%) were also seen as desirable occupations.

Money appears to be a key motivating factor for people wishing to change jobs (71% state 'will be better paid' as a main reason for wanting to change), closely followed by 'more interesting work' (67%).

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 London and overall).

Table 4.11 Total length of time expect to work at site		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
<1 month	10	11
1–3 months	23	20
>3 up to 6 months	25	16
>6 months up to a year	14	17
More than a year	7	20
Don't know	22	17
<i>Base: London respondents (355); Overall workforce (3,877)</i>		

Three in five workers (57%) expected to be on site for no more than six months. Clearly when the majority of workers are on any one site for such short periods of time, the opportunity for on-site training is considerably reduced. A relatively high proportion (22%) were unsure how long they would be on-site for, again making it difficult to tell whether on site training for these workers would be possible.

Workers in London are more likely to be on site for a shorter period of time than in the UK/ROI overall (47% expect to be on the same site for less than six months overall, compared with 57% in London).

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. London workers are also shaded (light).

London appears to be the largest 'net importer' of construction workers with just a third of workers originating from the region/area itself. Countries outside the UK/ROI were the most likely external source of workers (22%), followed by the South East (15%) and the East of England (9%).

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 the left and the percentages resident in neighbouring regions to the right. The results from the 2004 survey are also included for comparison.

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

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

Sites in London and the South East were least likely to employ workers who also lived the region (68% respectively). Compared with other regions London also had a relatively high proportion of workers living in neighbouring regions (30% lived from either the South East or East of England), indicating workers in London commute between regions to get from their home to their work. Good transport links and working opportunities coupled with high living costs in London go some way in explaining why London was among the regions most likely to have a higher than average proportion of the construction workforce not living in the region.

Table 5.3 shows the percentage of construction workers working outside the nation/region where they have a permanent residence. The results show that workers living in London were among the most likely to be working outside their region.

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 and Humber	18	22
North East	16	21
Wales	16	18
South West	15	27
North West	9	15
Northern Ireland	4	2
Scotland	1	8
All	18	21
<i>Base: All respondents (2007: 3,877; 2004: 8,436)</i>		

5.3 Temporary accommodation

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

Six percent of construction workers interviewed were based at a temporary address, similar to the overall average (7%). This proportion is considerably lower than in 2004, when 19% of workers on London said that they were based at a temporary address to get to work.

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 the results.

Table 5.4 Proportion of construction career spent in current region		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
All of it	28	43
Most of it	43	33
Around half	17	9
Small proportion	10	8
Only this job	1	3
Don't know	1	3
<i>Base: London respondents (355); Overall workforce (3,877)</i>		

As the table shows, just three in ten of workers (28%) had spent all of their time working on sites in London. This is lower than the national average of 48%, perhaps owing to the fact that workers based in and around London have access to other sites in the South East, and that workers in London do not necessarily stay in the region for a long time. Predictably those workers who work for a company that only operates in the local area are far more likely to spend all their time on sites in London (57%) than those who work for a company operating across the UK (12%).

5.5 Travel to work distances

The mean average number of miles travelled to work (each way) was 24 miles (the same as the figure for the UK/ROI overall), and the median average was 15 miles (18 miles for UK/ROI overall).

A quarter of workers in London (25%) reported travelling less than five miles to their place of work which the same as the proportion overall (26%). Seven in ten (71%) travel less than 25 miles which is slightly more than the overall figure of 64%, and is likely to be in part due to the fact that London is a small region geographically and is in close proximity to the South East, where a considerable proportion of London workers live. Still, 13% of construction workers in London reported travelling over fifty miles each way to work (10% overall).

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		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
New housing	65	73
Public non-housing	53	44
Commercial work	53	43
Housing repair and maintenance	49	38
Private industrial	38	33
Infrastructure	19	21
One type of project only	29	34
Two types of project only	19	19
Three types of project only	19	15
Four types of project only	12	12
Five types of project only	14	11
Worked on all six types of project	6	6
<i>Base: London respondents (355); Overall workforce (3,877)</i>		

As might be expected, construction workers in London were slightly less likely than the UK/ROI average to spend their time working on new housing (65% in London compared with 73% overall), and more likely to work on commercial projects (shops, offices, pubs, etc.) (53% vs. 43%) and public non-housing work (e.g. schools, sports facilities, landscaping) (53% vs. 44% overall).

The majority of workers had spent significant parts of their career across different types of project, only three in ten (29%) had worked on one type of sub-sector only. These results are very much in line with the UK/ROI overall.

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		
	London 2007 %	Overall Workforce (UK/ROI) 2007 %
Definitely will	42	44
Very likely	29	32
Quite likely	13	10
Quite unlikely	3	2
Very unlikely	2	2
Definitely will not	1	2
Hope to be retired in 5 years	2	2
Don't know	9	6
<i>Base: London workers aged under 60 (343); All respondents aged under 60 (3,703)</i>		

Two in five workers (42%) said they will definitely be working in construction in five years' time and just 6% think it's unlikely. Figures for London construction workers are similar to the overall figures. The data is also consistent with what was reported in 2004 among workers from London and the South East.