

Workforce Mobility and Skills in the UK Construction Sector 2018/19

Northern Ireland Report - May 2019





Study prepared by BMG Research from a commission by CITB.

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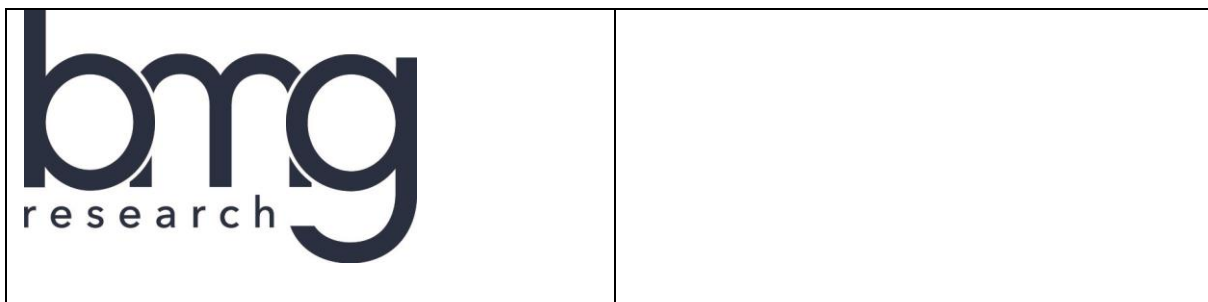




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Executive summary

Introduction

- CITB commissioned BMG Research to undertake the 2018/19 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 4048 construction workers undertaking manual roles on sites across the UK and 155 interviews were conducted with construction workers in Northern Ireland.

Profile of the sample

- All construction workers are male. Half the construction workers interviewed in Northern Ireland are aged under 35 (46%), which is a higher proportion than the general UK 16-64 years' workforce as a whole (36%), but similar to the UK average¹ in the survey (45%). Just 8% of construction workers are aged 60 or over.
- Overall 1% of the Northern Ireland construction workforce is of BME ethnic origin, compared with 3% in the Northern Ireland 16-64 years' population as a whole. The UK average in the survey is 6% (compared with 15% of the UK 16-64 years' population as a whole).
- By trade/occupation, the highest proportion of the Northern Ireland sample is accounted for by bricklayers (20%), followed by labourers/general operatives (15%), plant/machine operatives (15%) and carpenters/joiners (14%). Bricklayers are more heavily represented in 2018/19 than in previous surveys and the proportion has fluctuated since 2007 in Northern Ireland (9% in 2007; 16% in 2012; 6% in 2015 to 20% in 2018/19).
- A fifth of all those interviewed in Northern Ireland perform a supervisory or management role on their site (21%); a similar proportion to 2015 (20%) and lower than the UK average in 2018/19 (30%).
- Just over half of construction workers interviewed for the survey in Northern Ireland are employed directly by a company (52%), which is a slightly higher proportion than the UK average (of 49%). Nearly half of workers in Northern Ireland are self-employed (46%) and this is a slightly higher proportion than the UK average (of 43%). Since 2015 there has been a decrease in the proportion that are directly employed (from 64% in 2015) and an increase in the proportion that are self-employed (from 33% in 2015). Just 1% of construction workers in Northern Ireland work for an agency, which compares with 7% nationally and 3% within Northern Ireland in 2015.
- One in ten construction workers in Northern Ireland (10%) are employed on a temporary, rather than permanent basis. This is a lower proportion than the UK average (28%). By occupation the proportion is highest amongst carpenters/joiners (29%).

¹ Unless otherwise stated, the term 'UK average' used throughout this report is the average for the UK construction workforce as estimated by this survey.



- Similarly to the UK average, four-fifths of construction workers in Northern Ireland work between 40 and 49 hours per week (81%, compared with a UK average of 60%), and around 1 in 10 works more than 50 hours per week (9%), which is lower than the UK average (23%).

Work history

Time in the sector

- More than a third of all Northern Ireland construction workers have worked in the industry for over 20 years (37%), which compares with a lower UK average (32%). Nearly three-quarters have done so for 10+ years (71%).
- More than three-quarters of construction workers in Northern Ireland have only ever worked within the construction industry (79%), a slight decrease on 2015 (82%), but higher than the UK average in 2018/19 (67%). More than three-quarters of Northern Ireland's construction workers (78%) have worked pretty much continuously, without spells out of work and this is a higher proportion than that across the UK (56%).

Previous non-construction jobs

- Amongst the 1 in 12 construction workers in Northern Ireland that worked in another sector before starting work in construction (6% of all respondents), the sector worked in beforehand is most likely to have been agriculture, forestry and fishing (40%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trade occupations (40%).

Occupational switching within the construction sector

- Nearly two-fifths of construction workers in Northern Ireland (40%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is similar to 2015 (39%) and slightly higher than the UK average in 2018/19 (36%). The proportion that has worked in more than one role is significantly higher for those in a supervisory or management role (58%).
- Workers are most likely to have previously worked as a labourer/general operative (32%); while 1 in 5 have worked as a bricklayer (20%) and 1 in 6 as a plant/machine operative (18%).
- Thinking about their future plans in the construction sector, more than 8 in 10 construction workers in Northern Ireland would like to carry on in the same trade or occupation (87%), while 1 in 20 would like to change their trade/occupation (5%) and a further 1 in 20 would like to leave construction altogether (5%). The proportion that wants to carry on as they are is slightly higher in Northern Ireland than the UK average (80%).
- The most popular occupation that construction workers in Northern Ireland would like to change to is site manager (50% of those who would like to change).
- More than four-fifths of construction workers in Northern Ireland that would like to change trade/occupation (88%) believe they will require further training or qualifications in order to do so. This is a similar proportion to the UK average (87%).



- The main reason for wanting to change trade/occupation is the belief that the work will be less physical (63%), followed by the belief that workers will be better paid and/or more interesting (both 38%). A quarter cited the opportunity to use their skills/abilities better and/or more responsibility (25%).

Qualifications and skills

Skills cards/certificates

- Most construction workers in the Northern Ireland, as across the UK as a whole, hold some form of construction skill card or certificate (97% cf. 90% in 2015, 100% in 2012 and a UK average in 2018/19 of 97%).
- Younger workers (90% of 16-19 year olds) and those who have worked in construction for less than a year (78%) remain less likely to hold a skill card/certificate.
- In terms of the type of skill card/certificate held, CSR is the most commonly held overall within Northern Ireland (85%; 3% across the UK).
- Card colours vary by age and particularly by occupation; younger workers are more likely to hold Red Apprenticeship/Trainee cards (44% of 16 to 19 year olds with a CSR card), while older workers are more likely to hold Gold – craft/supervisor - cards (34% of 45+ year olds); labourers/general operatives are most likely to hold Green cards (57%); and bricklayers (44%) are most likely to hold Gold – craft/supervisor – cards.

Construction-specific qualifications

- Seventy-seven per cent of construction workers in Northern Ireland say they had no formal qualifications when they first started working in the construction industry. This compares with a lower UK average (72%).
- By current trade/occupation the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (91%) and lowest among carpenters/joiners (76%).
- Compared with less than 1 in 4 construction workers in Northern Ireland that did have qualifications when they first started working in construction (23%), more than half of all construction workers in Northern Ireland now hold some sort of construction related qualification (55%, compared with 45% in 2015 and a UK average in 2018/19 of 72%).
- Within Northern Ireland, the proportion of workers that currently hold any qualifications is lower than average amongst workers who have worked in construction for less than a year (11%).
- By trade/occupation plant/machine operatives (67%) are more likely than average to hold qualifications while only 1 in 6 labourers/general operatives (17%) hold any.
- The qualifications most likely to be held by construction workers in Northern Ireland are NVQ/SVQ qualifications (62% of those with qualifications) while 1 in 6 construction workers in Northern Ireland with qualifications hold City & Guilds qualifications (18%) and 1 in 8 hold an apprenticeship (12%).



Basic skill needs

- One in ten construction workers in Northern Ireland believe they would benefit from some form of training in basic skills (10%), which is a lower proportion than in previous years (17% in 2015, 16% in 2012 and 17% in 2007) but is similar to the UK average in 2018/19 (11%).
- In terms of the type of training required, workers are most likely to identify a need for training in Maths (8%) and least likely to need training in speaking English. They are equally likely to identify a need for training in reading and writing (4% and 5% respectively).

Current study for qualifications

- One in eight construction workers in Northern Ireland are currently working towards formal qualifications relevant to the construction industry (12% cf. 7% in 2015, 6% in 2012 and a UK average in 2018/19 of 15%). This proportion is significantly higher amongst 16-19 year olds (60%) and amongst those who have worked within the construction industry for less than a year (56%).
- Amongst workers with no qualifications 12% are currently working towards a qualification.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role around two-thirds are certain that they would not like to do so (65%), a higher proportion than across the UK (51%), while 1 in 4 would like to do so (25%) and 1 in 10 are unsure (10%).
- One in five construction workers in Northern Ireland (19%) and just over three-fifths of those who have had some form of supervisory or management responsibilities (61% cf. 59% in 2015 and 52% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions are lower than the UK averages (34% and 81% respectively).
- In-house training is most frequently mentioned as the type of training received (45%), followed by Site Safety Supervisors Courses (28%).

Overall skill levels

- The vast majority of construction workers in Northern Ireland (98%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSR card (or similar) or construction qualification. Just over a third of Northern Ireland construction workers (37%) hold a skill card/certificate, but have no other construction qualification. This compares with a lower UK average of 22%.
- Overall, more than two-fifths of Northern Ireland construction workers that provided a response have qualifications equivalent to Level 2 or above (42% cf. 43% in 2015, and 59% across the UK in 2018/19); a quarter hold qualifications equivalent to Level 3 or above (28% cf. 29% in 2015 and 40% in 2012).



Geographic mobility

Work history in the region/nation

- That they grew up there/have always lived there (70%) or that their employer sent them there (32%) are the most likely reasons why construction workers are based within Northern Ireland. A higher proportion state that it is because they grew up there than the UK average (43%) and a smaller proportion of workers in Northern Ireland say that they work there because their employer sent them there (51% across the UK).
- In 2018/19 compared with 2015 a higher proportion of construction workers in Northern Ireland have worked within their current region for their entire construction career (57% cf. 45% in 2015) but the proportion in 2018/19 is lower than in 2012 (73%) and 2007 (64%). The majority of construction workers in Northern Ireland have remained there for all or most of their career (92%). This is higher than the UK average of 77%.
- Most construction workers in Northern Ireland (93%) were also based there for their last job and this proportion is higher than in 2015 (86%).

Worker origins

- Overall, nearly all construction workers in Northern Ireland were living there when they started their construction careers (95% cf. 97% in 2015). Compared with other regions/nations, only workers in Scotland were more likely than those in Northern Ireland to live in the same region/nation in which they started their construction careers (96%).
- More than 9 in 10 construction workers in Northern Ireland (93%) have remained in the same region/nation in which they did their first qualification/training. Again, only workers in Scotland are more likely to have done so (96%).

Travel to site

- Two in five construction workers in Northern Ireland have travelled at least 50 miles from their permanent/current home to work in the last 12 months (39%). Across the regions/nations, Northern Ireland's construction workers are amongst those least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (14%).
- Overall, just 3% of construction workers in Northern Ireland (as in 2015) are currently staying in temporary accommodation while working at their site. This proportion is slightly lower than the UK average (5%).
- The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 18 miles (the same as the UK average) which is less than in 2015 when workers in the region travelled an average (mean) of 30 miles.

Site duration and change

- Around two-fifths of the temporary workers in Northern Ireland (38%) do not know how much longer they can expect to be working for their current company/agency. This is the same as the UK average.



- When all respondents, whether temporary or permanent, were asked to indicate how long in total they expect to work at that specific site during this phase, 3 in 10 expect to stay on that site for a year or longer (30% cf. UK average of 18%), which is similar to 2015 (28%). However, in around a quarter of cases (23%, as in 2015) workers do not know how much longer they can expect to be on site, indicating no change in the degree of uncertainty in the last 3-4 years.
- More than four-fifths of Northern Ireland construction workers are confident that when they finish their current job their next job will allow them to travel to work from their permanent home on a daily basis (86% cf. 68% in 2015 and 79% in 2012). This is a similar proportion to the UK average in 2018/19 (84%). The remaining 14% say it depends/they don't know or that they won't be able to commute.

Sub-sector and sector mobility

Sub-sector mobility

- The vast majority of construction workers in Northern Ireland have been working on new housing, and although this proportion was lower in 2015, this reflects findings in previous surveys (85% in 2018/19 cf. 61% in 2015, 85% in 2012 and 82% in 2007). Since 2015, there has been an increase in the proportions of construction workers that have worked on every type of project listed with the exception of private industrial work.
- Overall a fifth of construction workers in Northern Ireland have only worked on one project type (21%), which is a lower proportion than in 2015 (34%) and lower than the UK average of 30%.

Leaving the sector

- In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Amongst construction workers of all ages in Northern Ireland half say they definitely will be (50% cf. UK average of 48%); a further third think it is very or quite likely (36%); 4% consider it unlikely; just 2% say they definitely won't be and a further 5% hope to be retired by then, while 4% don't know.



Introduction

Aims and objectives

Following on from previous surveys conducted for CITB in 2015, 2012, 2007 and 2005, BMG Research was commissioned to undertake a UK-wide mobility survey of construction workers in 2018/2019.

The primary aim of this project is to provide robust and reliable information from site-based workers across the UK construction industry on their qualification levels and the extent of both occupational and geographic mobility. This work will ultimately provide an evidence-base that has the potential to provide a common currency for subsequent skills planning, particularly in respect of profiling the existing workforce and offering insight into where gaps might emerge as a result of occupational/geographic movement. The final data and findings will be used to ensure that everyone in industry, government, training providers and others know exactly what we will need to continue to develop as an industry.

The specific objectives of this research project were to:

- Examine the qualification levels of the construction industry workforce in the UK and analyse what part qualifications have played in career progression.
- Identify, quantify and analyse the extent to which the workforce in each region/nation comprises workers originating or living in other parts of the UK (or further afield) and mobility and travel to work.
- Examine the occupations and qualification levels of the mobile workforce / 'imported' workforce.
- Examine 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, both within construction and as they move out of the industry and related to this the extent to which managers and supervisors have received any training specifically to enhance their managerial skills.

The focus of the survey is on site-based manual occupations and, therefore, excluded associated clerical and sales occupations and professionals such as architects, surveyors and office-based managers.

Method

The 2018/19 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2015. Overall, 4048 interviews with construction workers in manual roles across the UK were completed, split between the 12 standard regions/nations. In total, 155 interviews were conducted in Northern Ireland.

It should be noted that there were far fewer sites available in Northern Ireland that were likely to meet this sampling criteria (regarding number of workers on site and value of the project) compared to other regions and nations, and as a result fewer site visits were arranged here.



When site visits could be arranged, these were typically smaller sites with fewer people working on them, and this was reflected in the number of interviews obtained.

Sampling

This sub-section provides an overview of the sampling methodology employed for the 2018 Construction Workforce Mobility Survey: further detail is provided in the technical report that accompanies this analytical report.

Although this survey focuses on the mobility of individual workers, the sampling strategy was to select construction projects (generally referred to in this report as ‘sites’) with sufficient workers on-site each day to enable a minimum of 10 interviews. This site-based approach was employed to ensure cost-effective face-to-face interviewing, comparable to that used in the 2015 survey.

As in previous surveys, the commercially produced ‘Glenigan’ database of construction projects was used as the sampling frame.

Project eligibility criteria:

- Value: £250,000+
- Contact stage: ‘start on site’; ‘contract awarded’ or ‘bills called’ only
- Site start date/end date: Active throughout planned fieldwork period.

Where sites met these criteria, they were deemed eligible to participate. A target of 30 sites per region/nation (as well as in Scotland, Wales and Northern Ireland) was set in order to achieve a sufficient number of interviews in each. However, in some instances this target was not achievable due to site refusals to take part, some sites not meeting the eligibility criteria on further screening and lower numbers of workers than expected ‘on-site’. In some regions, more than 30 sites were recruited.

Telephone-based site recruitment

BMG’s research team recruited sites that were eligible and willing to support the research by allowing an interviewer to visit the site to interview at least 10 workers in manual trades/roles. A recruitment questionnaire (reproduced in the technical report) was used to check eligibility of the site and to collect important operational information that would be required by the interviewer visiting the site. The majority of recruitment was undertaken with individual site managers, but in a number of cases the recruiters also spoke with local, regional or national managers (often dependent upon the size of the company). At this stage recruiters booked a convenient time and appointment date for an interviewer to visit the site and a confirmation email was sent to the relevant individual. Confirmation calls were made ahead of site visits to ensure recall of the visit.

Site visits

In the majority of cases, interviewers were allocated space to conduct interviews in the offices or canteen area. However, on some sites interviewers worked ‘on-the-hoof’ in active parts of



the site (with or without a 'chaperone'). All interviewers had completed the CSCS Health & Safety Test for Operatives immediately prior to fieldwork and had a PPE (Personal Protective Equipment) kit to comply with site requirements.

Interviews were completed using Computer Assisted Personal Interviewing (CAPI) techniques as well as self-completion techniques.

Further detail on the interviewing process is provided in the technical report.

The following table shows the number of interviews achieved in each region/nation. In order to obtain strong bases for regional/national analysis, a quota of 400 completed questionnaires per region/nation was set, with an allowance of +/- 50 interviews per region/nation. However, at the analysis stage weighting factors were applied to survey data to ensure that for national analysis, regions/nations were represented in their correct proportions according to the size of the construction workforce as reported in the Annual Population Survey via Nomis for economically active adults aged 16+ in October 2017 – September 2018.

Figure 1: Interviews and weights by region/nation

	Interviews	Weighted profile (%)
North East	411	3.9
North West	282	10.5
Yorkshire and The Humber	333	8.1
East Midlands	411	7.4
West Midlands	412	8.1
East of England	298	10.8
London	375	13.6
South East	403	14.4
South West	277	8.6
Scotland	404	8.0
Wales	287	4.3
Northern Ireland	155	2.2
UK	4048	

*Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Jan-Dec14

Further information on sampling and the sites included can be found in the technical report.

Notes on reading this report

A number of conventions have been employed within this report to assist with the concise presentation of numeric data and with brevity within text.

The base for statistics is described under each figure (table or graph) heading, with the base counts (unweighted) on dedicated rows of tables. Where tables include statistics on many different bases, the unweighted bases for 2018/19 data are shown in brackets.

All tables and graphs present percentages (unless otherwise stated) calculated upon the bases shown. Where 'mean' averages are shown, these are calculated upon the stated base, minus any responses 'not stated' or choosing a 'don't know/not applicable' response.



Tables and graphs are all labelled with a simple sequential 'Figure Number' and title. All tables and graphs have clearly labelled base sizes (for all sub-groups) and textual definitions of bases. The total of percentages shown in a table may vary slightly from 100% due to rounding to the nearest percentage point.

'*' is used to denote a statistic of less than 0.5% but greater than 0.

Analysis by region/nation should be read with caution, particularly those on bases further restricted by the routing out of some respondents. Unweighted bases are shown throughout for guidance.

Northern Ireland is referred to by the abbreviation 'NI' in tables.

Profile of construction site workers

This first section of the report provides a profile of construction site workers interviewed in the 2018/19 survey and where possible makes comparisons with 2015. The section examines:

- Personal demographics, including gender, age, ethnicity, nationality (including length of time that workers have been resident in the UK) and disability;
- Current occupation;
- Employment status i.e. whether employed directly, self-employed or by an agency;
- Employment contract basis i.e. whether working on a temporary or permanent basis.

The section then moves on to examine career histories, including:

- The number of years respondents have worked in the construction industry;
- Pre-construction employment histories;
- Occupational switching and progression within the construction sector.



Personal demographics

Figures 2 and 3 detail the demographic profile (gender, age, ethnicity, nationality and disability) of the 2018/9 sample of construction workers in Northern Ireland, compared with the 2015 survey and official statistics from the Annual Population Survey (where comparisons are possible).

All construction workers in manual roles interviewed in Northern Ireland were male. Male dominance is greater in the survey sample than in the UK construction workforce as a whole as this survey does not include those in office-based roles within the construction industry (either administrative or professional, where the incidence of female workers is higher) and interviews were conducted on relatively large construction sites (valued at £250,000+, with at least 10 workers), thereby excluding female construction workers on small building sites and maintenance and repair.

Figure 2: Gender profile of the sample compared with the Annual Population Survey

	NI 2018/19 %	UK 2018/19 %		UK Workforce* %
Male	100	98	Male	53
Female	0	1	Female	47
Transgender	0	<0.5	Transgender	-
Non-binary	0	<0.5	Non-binary	-
Prefer not to say	0	<0.5	Prefer not to say	-
<i>Unweighted bases</i>	<i>155</i>	<i>4048</i>		<i>32,277,500</i>

Q43 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2017-Sep 2018



Within Northern Ireland the youngest age group (16 to 24 year olds) account for a fifth of construction workers (19%), a higher proportion than in 2015 (14%) and 2012 (17%), but lower than in 2007 (24%). Compared with 2015 the same proportion of workers are aged 25 to 34 years (27%), while the proportion of workers aged 35 to 44 is lower than in 2015 (20% cf. 23%). There are fewer 45 to 54 year olds among Northern Ireland construction workers compared with 2015 (18% cf. 23%) while the proportion of workers aged 55 and over is slightly higher compared with 2015 (15% in 2018/19 and 11% in 2015). Workers aged 60 and over account for 8% of construction workers, twice the proportion reported in 2015.

Compared with the UK construction workforce overall there is a slightly higher proportion of construction workers that are aged under 35 years within Northern Ireland (46% in Northern Ireland; 45% across the UK cf. 36% of economically active adults across the UK).

Figure 3: Age profile of the sample compared with 2015, 2012, 2007 & the Annual Population Survey

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %		UK Workforce* %
16 to 19 years	6	4	4	8	5	16 to 19 years	4
20 to 24 years	13	10	13	16	12	20 to 24 years	9
25 to 34 years	27	27	33	26	28	25 to 34 years	23
35 to 44 years	20	23	21	25	23	35 to 49 years	33
45 to 54 years	18	23	18	16	20	50 to 64 years	27
55 to 59 years	7	7	8	8	7		
60+ years	8	4			4	65+ years	4
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>406</i>	<i>263</i>	<i>4048</i>		<i>32,277,500</i>

Q44 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2017-Sep 2018

In terms of ethnicity, the vast majority of construction workers in Northern Ireland are of White origins, consistent with previous years (97% cf. 98% in 2015 and 2012).



Figure 4: Ethnic profile of the sample compared with 2015, 2012, 2007 and UK Population

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %	UK Population aged 16-64* %
White	97	98	98	99	94	85
Black	1	0	0	0	2	3
Asian	0	0	0	0	2	6
Mixed	0	-	-	-	1	1
Other/Not stated	2	2	2	<0.5	1	4
Unweighted bases	155	274	406	263	4048	41,217,200

Q49 *Source Annual population Survey via Nomis: UK population aged 16-64 Oct 2017-Sep 2018

Figure 5 summarises the proportion of construction workers of non-white (BME) origin overall and within each region/nation and compares the profile with construction workers from previous surveys and the population (aged 16-64) of each region/nation as a whole.

Compared with the Northern Ireland population as a whole (aged 16-64) a slightly lower proportion of Northern Ireland's construction workers are of BME origins (1% cf. 3% amongst the Northern Ireland population and 15% of the UK population).

Compared with other regions/nations, Northern Ireland has a low proportion of construction workers that are of BME origin, reflecting the population profile.

Figure 5: Proportion of construction workers of BME (Non-White) origin

Base: All respondents

	UK BME 2018/19 %	UK BME 2015 %	UK BME 2012 %	UK BME 2007 %	Non-white (BME) population aged 16-64* %
UK	6	4	4	3	15
North East	<0.5	<0.5	<0.5	2	5
North West	3	1	2	3	12
Yorkshire and the Humber	5	2	1	10	12
East Midlands	2	2	2	<0.5	13
West Midlands	7	5	9	1	20
East of England	5	3	4	0	10
London	15	15	12	0	40
South East	10	8	3	3	11
South West	5	2	1	2	6
Wales	2	2	<0.5	1	5
Scotland	1	2	1	7	5
Northern Ireland	1	1	<0.5	4	3
Unweighted bases	4048	4771	4933	3877	41,217,200

Q49 *Source Annual population Survey via Nomis: UK Population aged 16-64 by ethnicity Oct 2017-Sep 2018



In the survey construction workers were asked for detail about their nationality and country of origin.

The majority of construction workers in Northern Ireland (95%) originated from the UK and the remaining 5% originated from outside of the UK. The majority of those originating from another country originate from the Republic of Ireland (3% of all construction workers). No more than 1% of construction workers originate from any other single specified country, while 1% of construction workers originate from an EU country other than the UK and Republic of Ireland.

Figure 6: Country of origin of construction workers in the UK by region/nation

*Base: All respondents * Other EU includes Ireland and Romania but excludes the UK*

<i>Row percentages</i>	<i>Unweighted bases</i>	Non-UK %	Ireland %	Romania %	Other EU* %
UK	4048	17	1	5	10
East Midlands	411	6	0	2	3
East of England	298	28	1	10	18
London	375	51	5	15	31
North East	411	1	<0.5	0	1
North West	282	3	<0.5	1	2
South East	403	25	1	7	13
South West	277	9	1	1	5
West Midlands	412	12	<0.5	3	6
Yorkshire and the Humber	333	11	<0.5	2	6
Wales	287	3	0	0	1
Scotland	404	3	1	<0.5	3
Northern Ireland	155	5	3	0	4

Thirty per cent of construction workers in Northern Ireland hold a passport for another country. This compares with a UK average of 14%. The majority hold a UK passport (61%), with a further 10% reporting that they do not have a passport. Of those with a non-UK passport, most (96%, equating to 28% of all Northern Ireland construction workers) state that it is an EU member state passport - in many cases a Republic of Ireland passport.

Of those construction workers in Northern Ireland that were born outside of the UK or have a non-UK passport, 60% have British citizenship, which compares with a UK average of 14%.

Overall, most Northern Ireland construction workers have lived in the UK all of their life (90%). This proportion is significantly higher than the UK average (80%).

Amongst all Northern Ireland construction workers, three per cent indicate that they have a long term illness, health problem or disability which limits the type of work they can do. Two of the four workers citing a limiting condition have hearing issues, while one worker cited mobility issues and the other worker reporting such a condition cited another unspecified issue.



Occupational profile

Current job role

All workers were asked what their current trade or occupation is at their site. Respondents in a supervisory role were asked to detail their trade/occupation background, as their supervisory roles would be asked about later in the survey. Figure 7 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from previous surveys.

In 2018/19 bricklayers, labourers/general operatives, plant/machine operatives and carpenters/joiners are the top four occupations amongst construction workers in Northern Ireland. This broadly reflects the profile across the UK, although there are more bricklayers, plant/machine operatives and carpenters/joiners and fewer site managers in Northern Ireland. There has been an increase in the proportion that are bricklayers in 2018/19 (fluctuating over the years: 9% in 2007; 16% in 2012; 6% in 2015 and 20% in 2018/19) and a higher proportion that are plant/machine operatives in 2018/19 compared with previous years (13% in 2007; 9% in both 2012 and 2015 and 15% in 2018/19).

Figure 7: Occupational profile

Base: All respondents '-' = not applicable

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
Bricklayer	20	6	16	9	11
Labourer/General operative	15	20	15	21	16
Plant/machine operative (e.g. fork lift/JCB)	15	9	9	13	7
Carpenter/joiner	14	12	12	15	10
Electrician	9	8	14	10	6
Site manager	6	5	0	0	11
Scaffolder	3	2	6	2	4
Plumber	3	3	8	5	4
Painter/decorator	3	1	2	6	2
Plasterer	3	5	4	7	1
Technical	3	8	1	-	4
Ground worker	2	<0.5	0	0	4
Dryliner	1	4	3	With plasterer	3
Banksman/banksperson	1	2	1	1	1
Pipe fitter	1	1	1	2	2
Roofer	1	1	2	3	2
Gardener/landscaper	1	-	-	-	-
Demolition worker	1	-	-	-	<0.5
Unweighted bases	155	274	406	263	4048

Q5



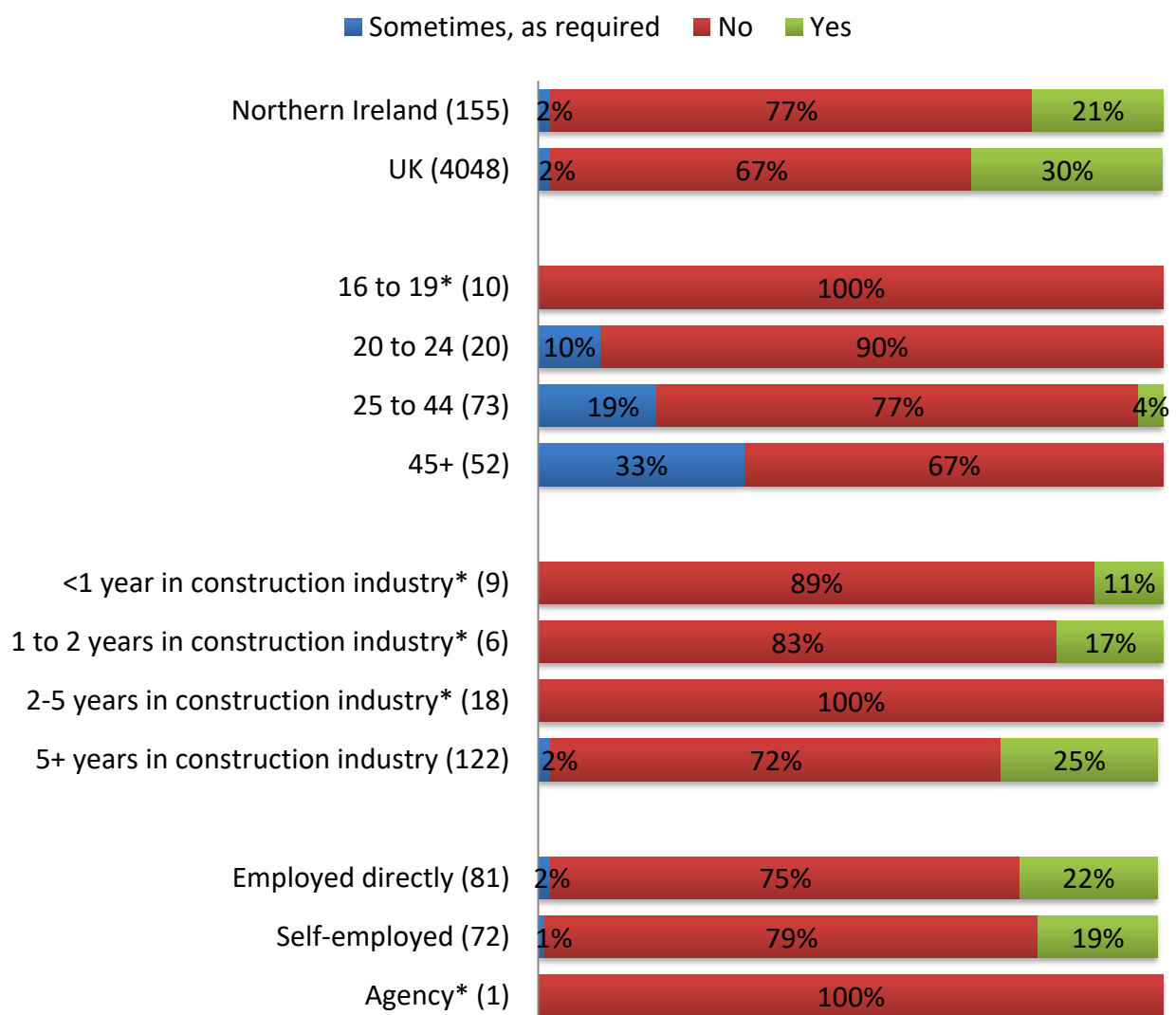
Supervisory roles

A fifth of all construction workers in Northern Ireland interviewed for the 2018/19 survey say they perform a supervisory or management role on their site (21%). This is a similar proportion to 2015 (20%), and significantly lower compared to the UK average in 2018/19 (30%).

The incidence of workers in a supervisory role is considerably lower amongst workers aged under 25 (7%) and amongst those that have worked in the construction industry for less than 5 years (6%), as one would expect. Workers who are directly employed by a company (22%) are more likely than those that are self-employed (19%) or work for an agency (none) to perform a supervisory or management role. These differences are summarised in the following figure.

Figure 8: Whether respondents perform a supervisory or management role

Base: All respondents * caution: small sample base



Unweighted bases in parentheses Q8



Employment status

More than half the construction workers in the 2018/19 Northern Ireland sample are employed directly by a company (52%). This is a lower proportion than in 2015 (64%) but the same as in 2012.

Approaching half the construction workers within 2018/19's Northern Ireland sample are self-employed (46%), which is a higher proportion than in 2015 (33%) but similar to that reported in 2012 (47%).

The proportion of workers who are self-employed increases by age from 23% of 16 to 24 year olds to 53% of workers aged 25 to 44 and 50% of 45+ year olds.

Figure 9: Employment status

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	UK 2018/19 %
Employed directly by a company (contractor or sub-contractor)	52	64	52	49
Self-employed	46	33	47	43
Working for an employment agency	1	3	1	7
Working on some other basis	1	1	0	<0.5
<i>Unweighted bases</i>	155	274	406	4048

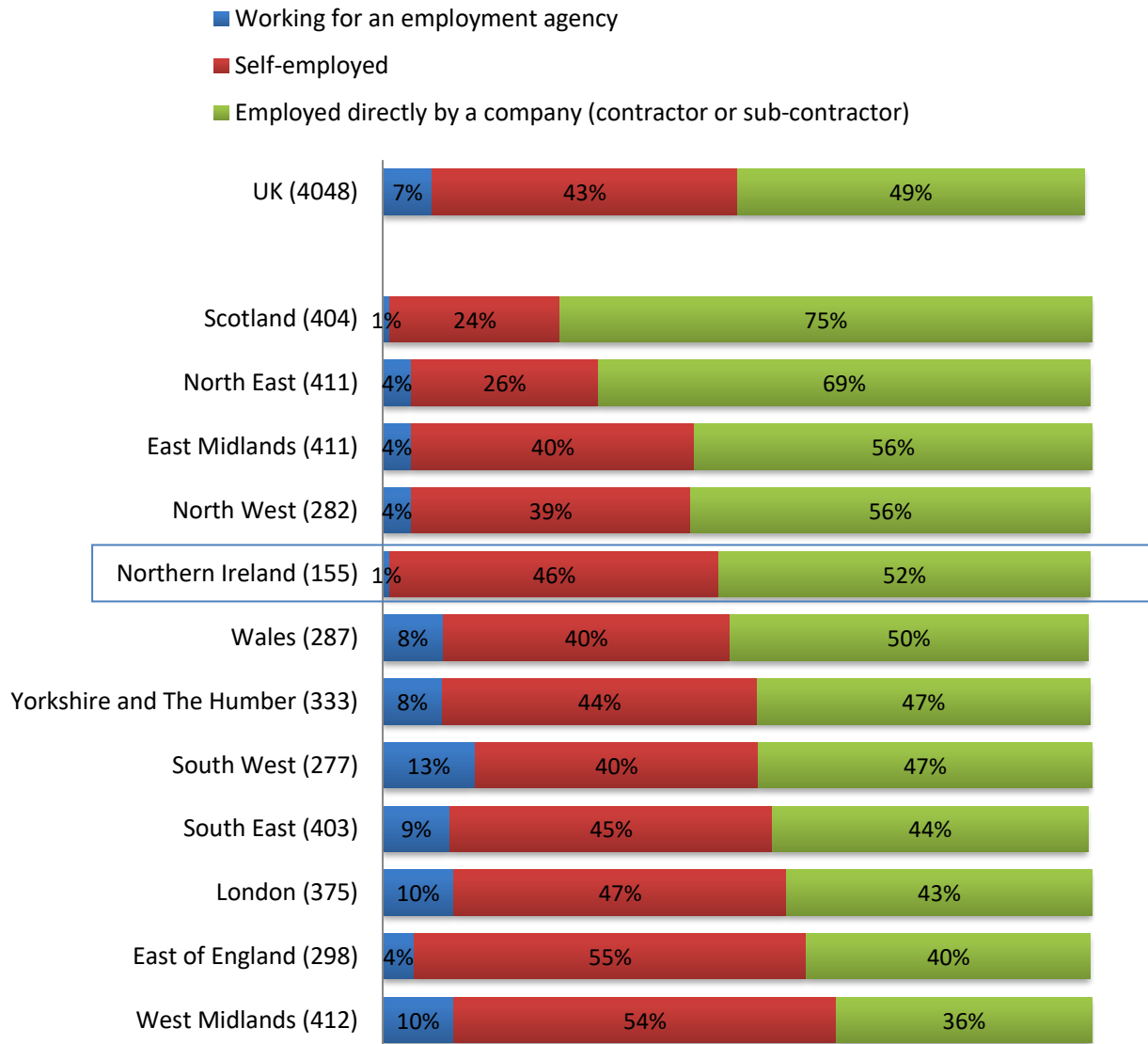
Q20



Compared with UK construction workers, those in Northern Ireland are slightly more likely to be directly employed or self-employed, but much less likely to be working for an agency.

Figure 10: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses Q20



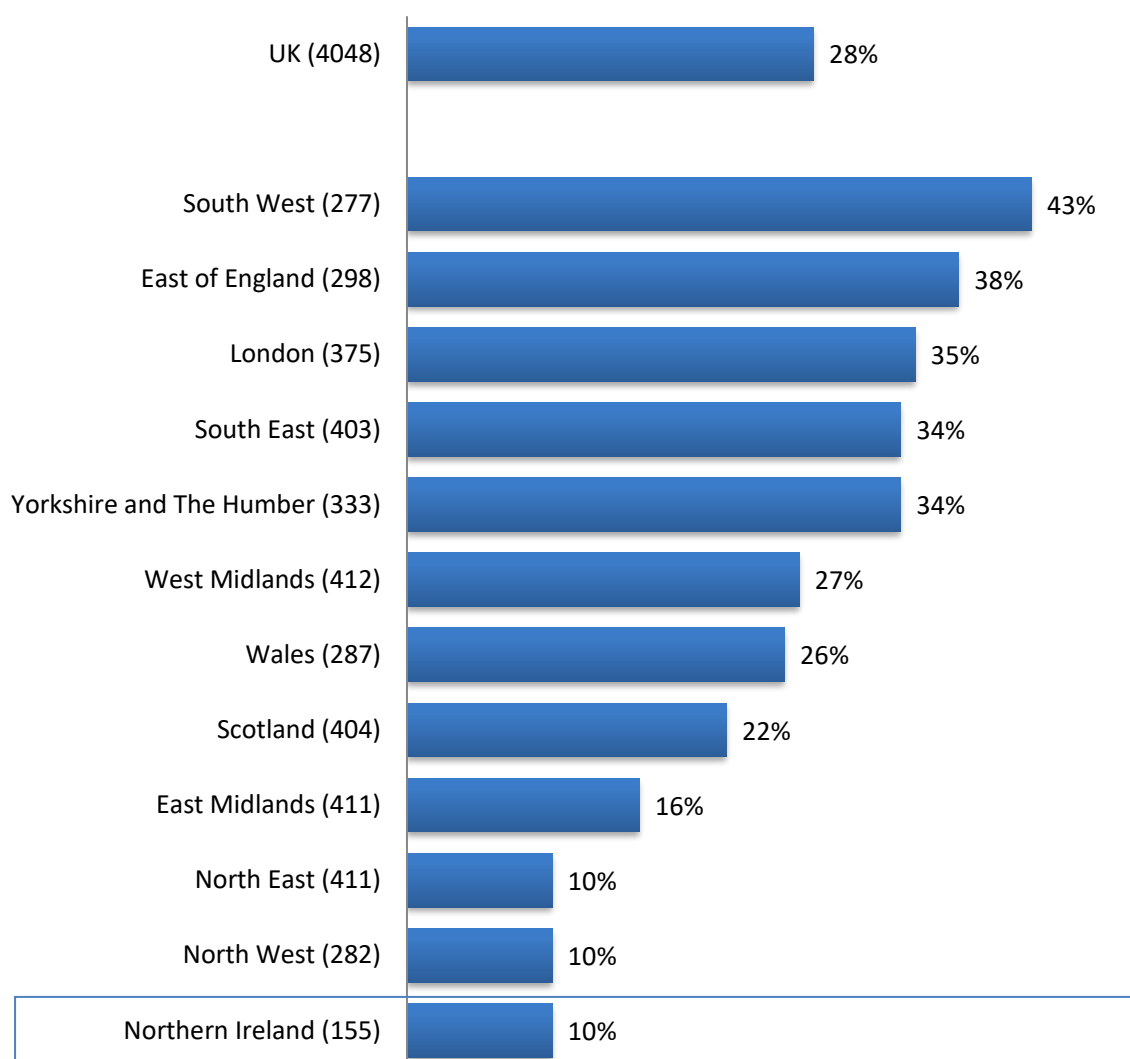
Employment contract basis

Overall, one in ten Northern Ireland construction workers (10%) is employed on a temporary, rather than permanent basis (88%). This reflects a move towards more permanent employment in 2018/19 compared with 2015 when a third (32%) was employed on a temporary basis.

Northern Ireland is significantly lower than the UK average with regard to the profile of its construction workforce in terms of temporary employment contracts held, as the following figure illustrates.

Figure 11: Proportion of workers employed on a temporary basis (including fixed-term contracts)

Base: All respondents



Unweighted bases in parentheses Q21

By current trade/role, the proportion working on a temporary basis is higher than average amongst carpenters/joiners (29%).



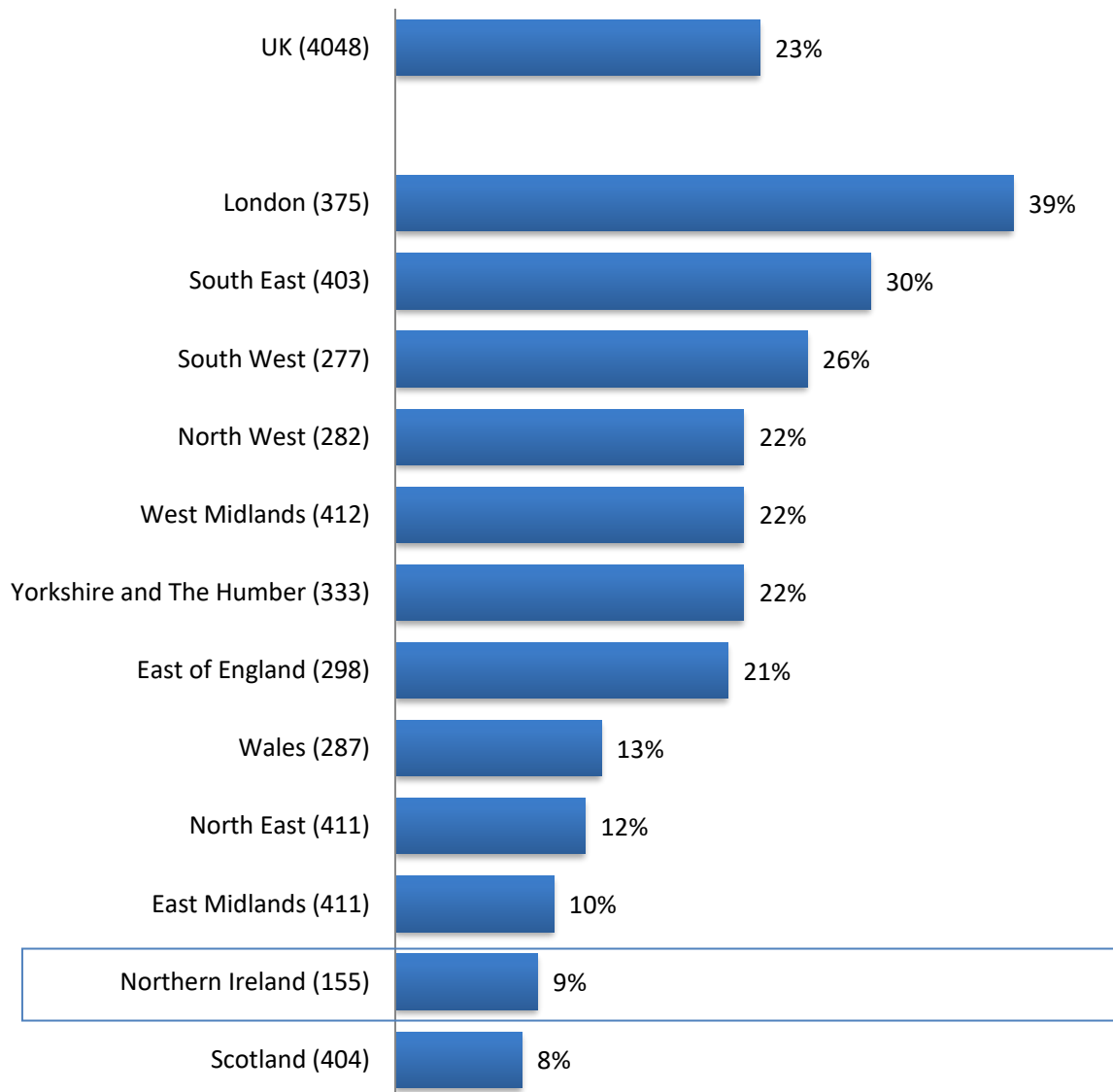
Hours worked

Construction workers in Northern Ireland, as across the UK as a whole, are most likely to report that they work between 40 and 49 hours per week (81%, compared with a UK average of 60%). Around one in ten (9%) works more than 50 hours a week, which is lower than the UK average (23%).

Figure 12: Proportion of workers that typically work 50 or more hours per week

Base: All respondents

Unweighted bases in parentheses



Unweighted bases in parentheses Q22



Work histories

Time in the sector

More than a third of Northern Ireland construction workers have worked in the construction industry for over 20 years (37%), more than two-thirds have worked in the industry for at least 10 years (71%).

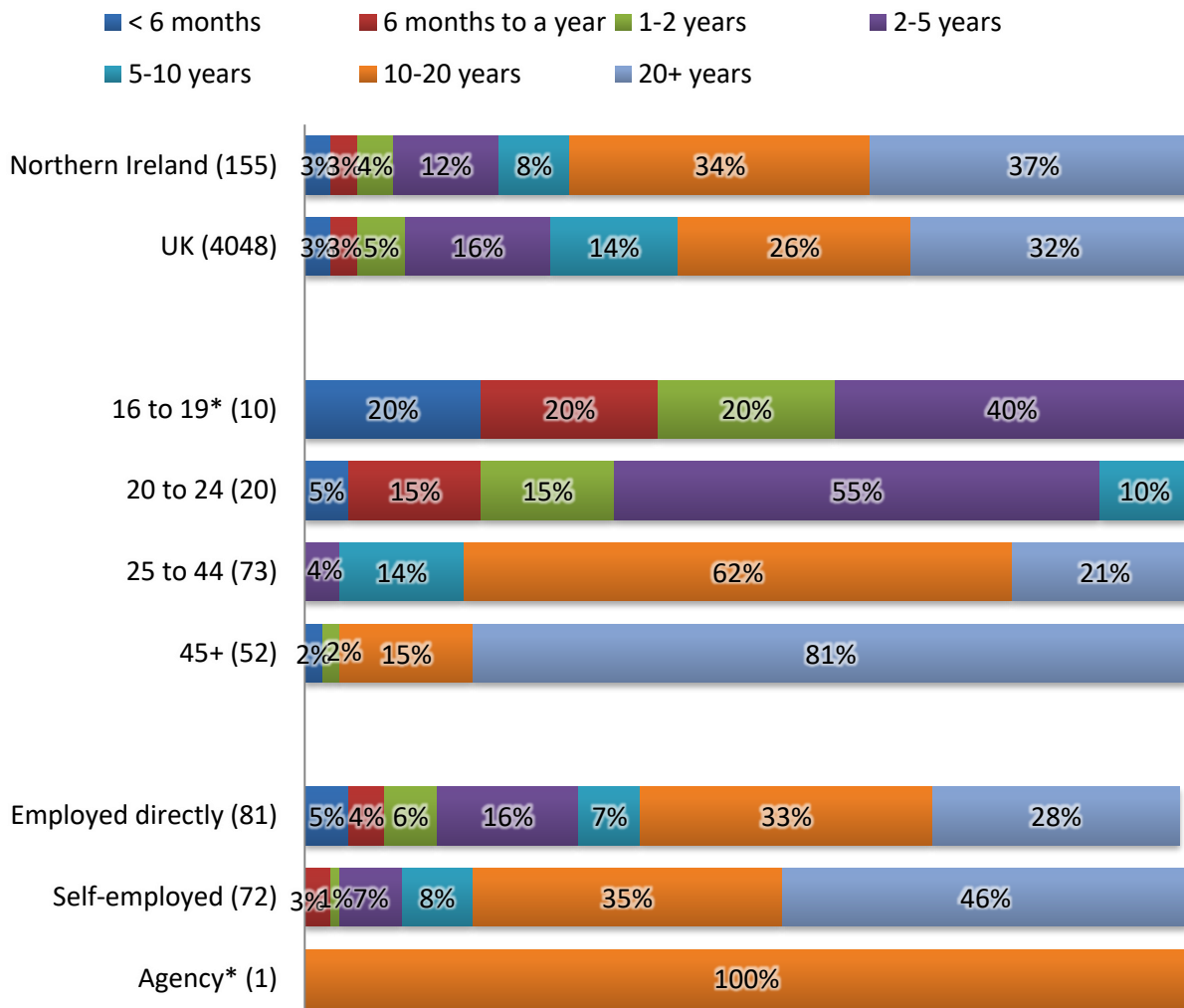
Construction workers in Northern Ireland are slightly more likely than the UK average to have worked in industry for over 20 years (37% cf. 32% across the UK).

As one would expect, the length of experience in the industry increases with age to four-fifths of workers aged 45 and over in Northern Ireland that have more than 20 years' experience of working in the construction sector (81%).

Figure 13: Years spent working in the construction sector

Base: All respondents

Unweighted bases in parentheses



Unweighted bases in parentheses Q1



Compared with 2015, Figure 14 shows that in 2018/19 just under two-thirds of workers have worked in the construction sector for less than 20 years (63%); 37% have 20+ years' experience, compared with 36% in 2015, whilst 29% have 10 or fewer years' experience, compared with 31% in 2015.

Figure 14: Years spent working in the construction sector (cumulative)

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
Less than 6 months	3	5	1	2	3
Up to a year	6	8	3	5	6
Up to 2 years	10	11	6	12	12
Up to 5 years	21	17	14	26	28
Up to 10 years	29	31	39	46	42
Up to 20 years	63	63	71	73	68
More than 20 years	37	36	27	27	32
<i>Unweighted bases</i>	155	274	406	263	4048



Pre-construction employment histories

More than three-quarters of workers in Northern Ireland have only ever worked in the construction industry (79% cf. 67% across the UK and 82% within Northern Ireland in 2015). This includes the vast majority that have worked in construction pretty much continuously (78%); 1% for whom this is their first job; and a further 1% that have only ever worked in the construction sector, but have had spells out of work.

The likelihood that workers have worked continuously in construction increases to more than four-fifths of workers aged 25 and over (84% of 25-44 year olds; 81% of 45+ year olds). As one would expect, younger workers are more likely to say that this is their first job and that they have not worked in any other industry (10% of 16 to 19 year olds).

Figure 15: Statement that best describes respondents' work histories since leaving full time education and starting their first job in construction.

*All respondents *caution: small sample base*

	NI 2018/19 %	NI 2015 %	UK 2018/19 %	Age %			
				16 to 19*	20 to 24	25 to 44	45+
I've worked in construction pretty much continuously (and not worked in any other industry)	78	69	56	60	65	82	81
I have only worked in construction jobs but have had spells of being out of work	1	8	4	0	0	1	0
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	12	7	7	20	15	14	8
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	6	10	23	0	15	1	12
This is my first job. I haven't worked in any other industry.	1	5	7	10	0	0	0
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	2	1	3	10	5	1	0
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>4048</i>	<i>10</i>	<i>20</i>	<i>73</i>	<i>52</i>

Q2

Overall, 6% of construction workers in Northern Ireland say that their first job after full time education was not in construction and that they moved into the industry after working in other sorts of jobs/sectors. This is a slightly lower proportion than that reported in 2015 (10%).



Those who had worked in other sectors before starting their construction careers were asked to give details of what they were doing immediately before they started working in construction. In two-fifths of cases respondents had previously worked in agriculture, forestry and fishing (40%) while 1 in 5 had worked in manufacturing or wholesale and retail (20% in each case).

Figure 16: Industry worked in before starting work in the construction sector

*Base: Where first job was not in construction *caution: low sample base*

	NI 2018/19* %	NI 2015 %	UK 2018/19 %
A - Agriculture, Forestry and Fishing	40	23	9
C – Manufacturing	20	23	45
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	20	17	19
H - Transportation and storage	10	7	6
O – Public administration and defence; compulsory social security	10	3	<0.5
<i>Unweighted bases</i>	<i>10</i>	<i>30</i>	<i>862</i>

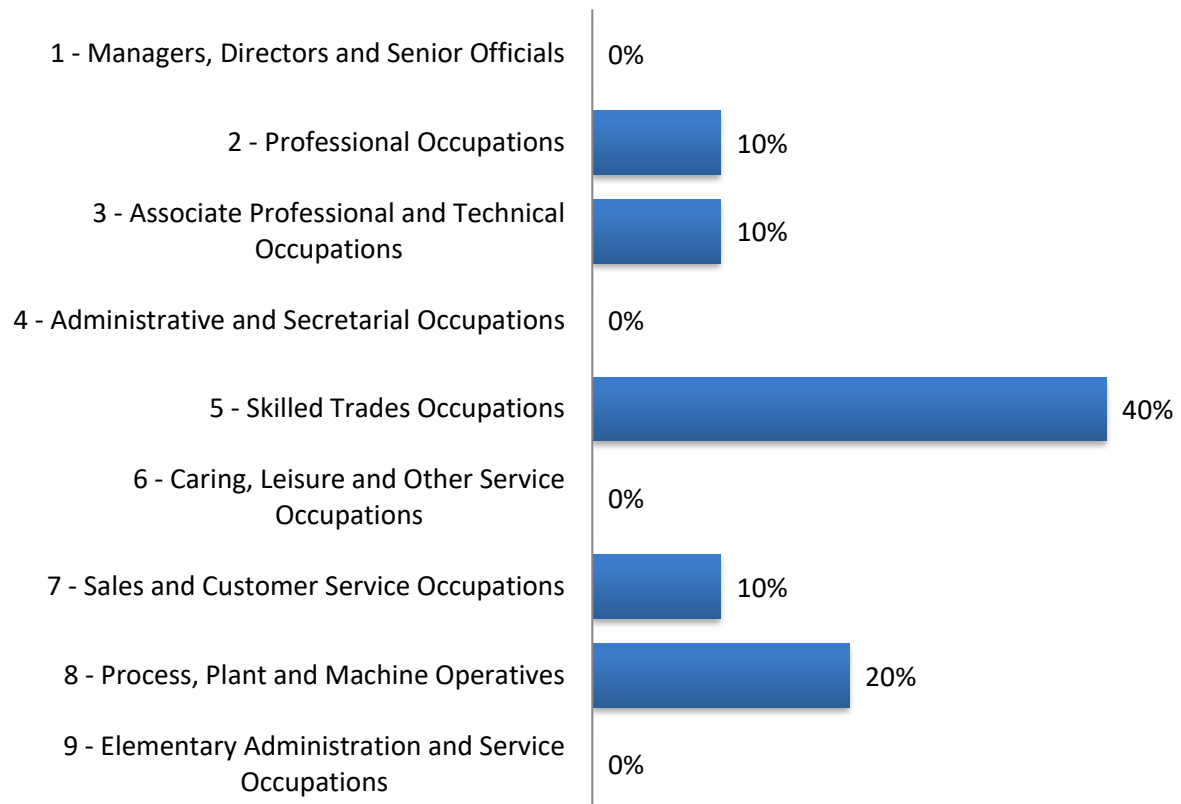
Q3

In terms of the job roles that Northern Ireland construction workers have undertaken in other sectors, two-fifths had worked in skilled trades occupations (40% cf. 27% across the UK). A fifth had worked as process, plant and machine operatives (20%).



Figure 17: Job roles undertaken in other sectors

*Base: Where first job was not in construction * caution: small sample base*



Unweighted base = 10 Q3*



Occupational switching and progression within construction

All workers were asked whether they have worked in other roles/occupations whilst working in the construction industry.

Overall two-fifths of all construction workers in Northern Ireland have worked in more than one construction trade or occupation whilst working in the construction industry (40%), which is a similar proportion to 2015 (39%) and slightly higher than the UK average in 2018/19 (36%).

Workers who perform a supervisory or management role on site are significantly more likely to have had more than one role or occupation within the construction sector (58%).

As in 2015, there are also variations by current job role, with plant/machine operatives (58%) and labourers/general operatives (48%) most likely to have had more than one role/occupation within construction. The following figure summarises the current job roles most and least likely to have had more than one role/trade in the construction sector.

Figure 18: Other construction roles under taken, by current occupation

Base: All respondents

MORE likely to have had more than one role			LESS likely to have had more than one role		
	NI 2018/19 %	UK 2018/19 %		NI 2018/19 %	UK 2018/19 %
Plant /Mach. Op. (24)	58	55	Bricklayer (31)	29	24
Labourer /Gen. Op. (23)	48	29	Carpenter/Joiner (21)	29	22
<i>Unweighted bases for 2018/19 Northern Ireland in parentheses</i>					

Q6



Respondents who have worked in other roles/occupations within the construction industry, other than the role they are currently in, were asked to specify which trades/occupations they have previously worked in, with each respondent able to list all previous occupations. Figure 19 summarises the previous trades/occupations most frequently listed by those who have worked in other roles in the construction sector.

Workers are most likely to have previously worked as a labourer/general operative (32%) while 1 in 5 workers has previously worked as a bricklayer (20%) and 1 in 6 workers had previously worked as a plant/machine operative (18%).

Figure 19: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	NI 2018/19 %	UK 2018/19 %
Labourer/General operative	32	34
Bricklayer	20	12
Plant/machine operative (e.g. Fork lift/JCB)	18	10
Carpenter/joiner	15	19
Plasterer	8	8
Floorer	8	4
Site manager	5	5
Painter/decorator	5	7
Plumber	5	5
Roofer	3	8
Banksman/Banksperson	3	6
Dryliner	3	8
Scaffolder	3	4
Electrician	2	5
Steel erector/rigger	2	4
Technical e.g. surveyor, maintenance technician	2	3
Mechanical fitter	2	1
Ceiling fixer	2	5
Other	8	7
<i>Unweighted base</i>	<i>60</i>	<i>1328</i>

Q7



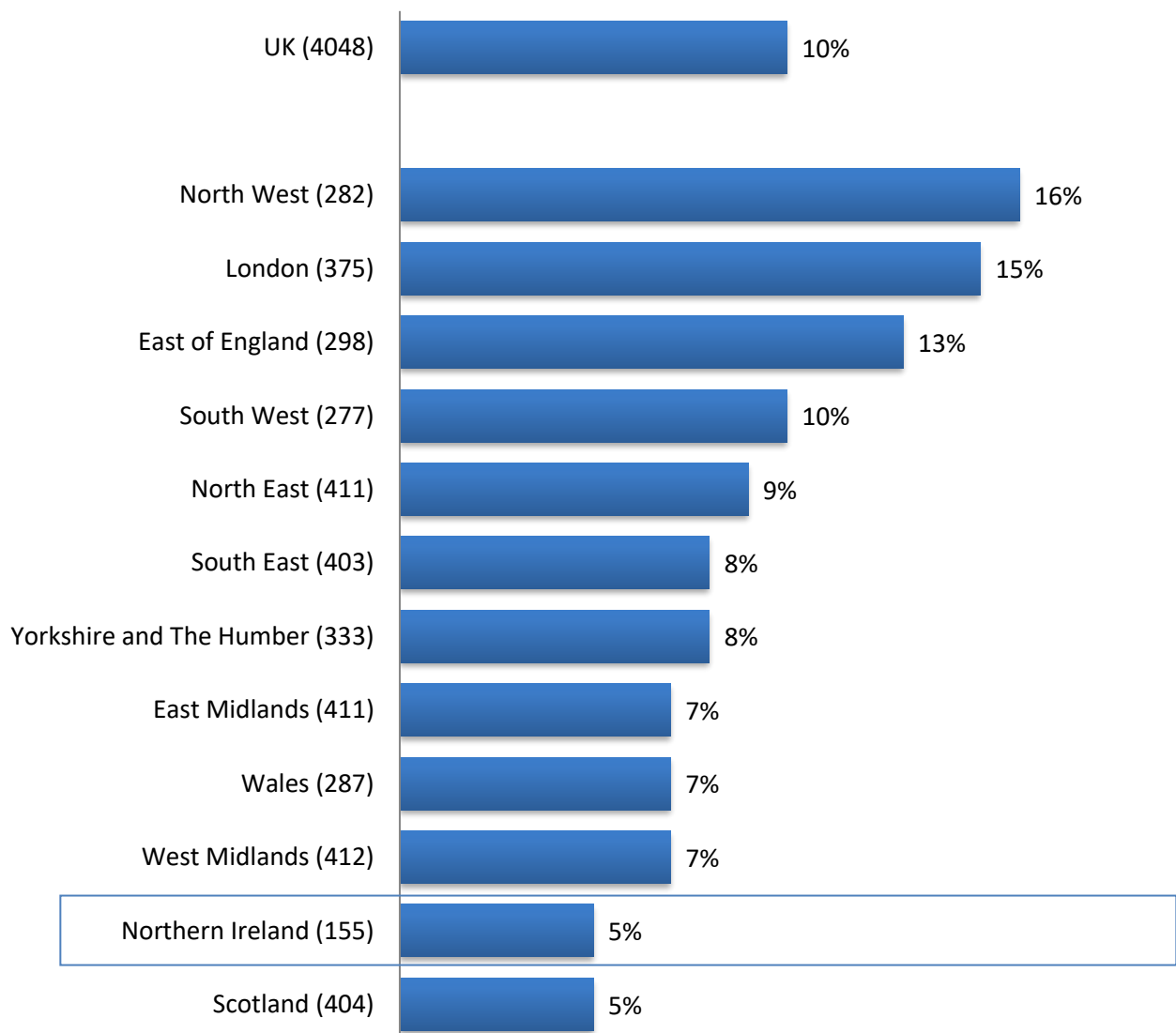
Future career plans

Thinking about their future plans in construction, nearly 9 in 10 construction workers in Northern Ireland would like to carry on in the same trade or occupation (87%); 1 in 20 would like to change their trade/occupation (5%); and a further 1 in 20 would like to leave construction (5%); the remainder (3%) are not sure.

Compared with the UK average, Northern Ireland construction workers are slightly more likely to want to carry on as they are (80% across the UK) and less likely to want to change their trade/occupation (10% across the UK).

Figure 20: Proportion of construction workers that would like to change their trade or occupation, by region/nation

Base: All respondents



Unweighted bases in parentheses Q33



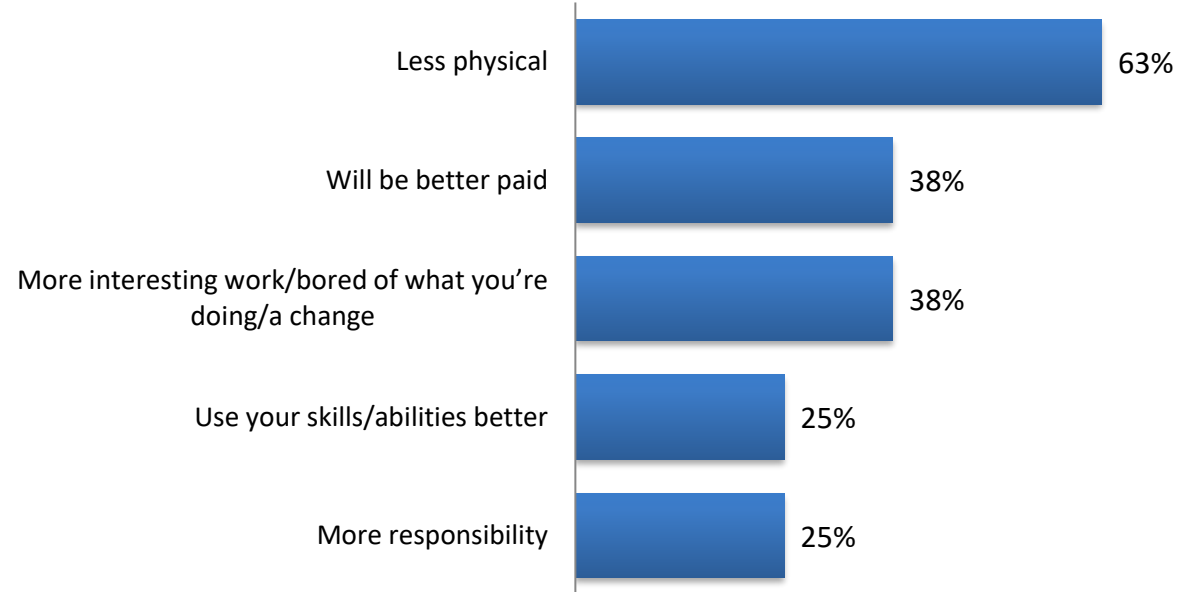
In terms of being likely to want to change their trade or occupation, those working as plant/machine operatives (96%) are most likely to want to carry on as they are.

Amongst those who would like to change trade or occupation, a wide range of alternative trades/occupations are mentioned. However, the highest proportion overall would like to be a site manager (50%). (It should be noted that this and the analysis that follows with regard to changing trade/occupation is based on just 8 respondents in Northern Ireland.)

In most cases where construction workers in Northern Ireland would like to change trade or occupation, they believe they will require further training or qualifications in order to do this (88% - all but one worker that would like to change trade or occupation). This compares to a lower proportion in 2015 (60%) and is similar to the 2018/19 UK average (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that the new trade or occupation will be less physical (63%), while other significant reasons include that they will be better paid or that they would have more interesting work (or that they are bored with what they are currently doing) (both 38%), slightly fewer want more responsibility or to use their skills/abilities better (both 25% - each equating to 2 respondents).

Figure 21: Reasons for wanting to change trade/occupation
*Base: Where workers would like to change trade/occupation * caution: small sample base*



Unweighted base = 8 Q36



Qualifications and skills

This section of the report explores construction workers' qualification levels and other accreditations, examining differences by key variables such as region/nation, occupation and length of experience. The issues covered in this section include:

- The range of skill cards and certificates held by workers;
- Construction-related qualifications gained before starting work in the construction sector; since starting work in the sector; and qualifications being worked towards;
- Workers self-perceived need for additional training in basic skills.

Construction skill cards and certificates

When asked which type of construction skill certificate or card they currently hold (e.g. CSCS or CSR) just 2% of all construction workers in Northern Ireland (2% across the UK) say they do not hold any card and 1% are unsure. In total therefore 97% of all workers are certain that they hold at least one type of skill card or certificate that provides evidence to construction sites that they have received a certain level of health and safety awareness training.

Figure 22 summarises the proportion of workers by region/nation that hold any card and compares these proportions with previous surveys and the UK as a whole. Workers in Northern Ireland are on a par with the UK average in respect to holding skill certificates or cards and, following a decline in this respect in the region since 2012, there has been some improvement.

Figure 22: Proportion of workers that have a skill card/certificate, by region/nation

Base: All respondents

	2018/19 %	2015 %	2012 %
UK (4048)	97	96	97
West Midlands (412)	99	98	100
Scotland (404)	99	88	98
Yorkshire and the Humber (333)	98	97	97
London (375)	98	98	96
South East (403)	98	98	96
North West (282)	98	97	99
East of England (298)	97	96	98
South West (277)	97	96	97
Northern Ireland (155)	97	90	100
North East (411)	94	96	99
East Midlands (411)	93	93	99
Wales (287)	92	92	92
<i>Unweighted bases for 2018/19 in parentheses</i>			



As in previous surveys, the incidence of workers holding skill cards or certificates remains slightly lower amongst younger workers (90% amongst 16 to 19 year olds) and those who have worked within construction for a shorter period of time (78% amongst those that have worked in the industry for less than a year). This suggests that employers are not always ensuring that new employees are immediately made aware of the need to prepare for, or acquire, a CSCS card (or similar) and/or that young trainees are starting work/placements without the assurance that comes from having achieved such an accreditation. Within Northern Ireland there has been no improvement in this respect with younger workers but a small improvement in this respect with workers that have started working in construction in the last 2 years since 2015 in the propensity to hold a skill card or certificate.

Figure 23: Proportion of workers that have a skill card/certificate, by other variables

Base: All respondents *caution: small sample base

		NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
Total (155)		97	90	100	84	97
Age	16 to 19 years* (10)	90	100	100	73	85
	20 to 24 years (20)	95	89	100	74	97
	25 to 44 years (73)	100	86	100	89	98
	45+ years (52)	96	94	100	83	98
Length of time in construction	<1 year in construction* (9)	78	71	0	22	89
	1 to 2 years* (6)	100	67	0	82	97
	2 to 5 years* (18)	94	94	100	87	96
	5+ years (122)	99	92	100	88	98
Contract-type	Employed directly (81)	98	88	100	83	96
	Self- employed (72)	97	95	100	87	98
	Agency* (1)	100	71	0	N/A	97
Unweighted bases for 2018/19 Northern Ireland in parentheses						

Q12



In terms of the type of skill card or certificate held by construction workers in Northern Ireland, the CSR (Construction Skills Register (NI)) is the most commonly held (85%) as it was in 2015 (70%). Overall, 7% hold the CSCS (Construction Skills Certification Scheme (GB)) and this proportion increases to 10% amongst workers aged 45+.

Figure 24: Type of skill card/certificate held

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	UK 2018/19 %
CSCS (Construction Skills Certification Scheme) (GB)	7	17	100	85
CSR (Construction Skills Register) (NI)	85	70		3
CISRS (Construction Industry Scaffolders Record Scheme)	2	1	1	3
CPCS (Construction Plant Competence Scheme)	4	8	3	11
Other	3	1	5	4
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>406</i>	<i>4048</i>

Q12

Analysis by current job role highlights where the incidence of certain types of skill card/certificate is higher than average:

- Plant/machine operatives (17%) are more likely to hold CPCS (Construction Plant Competence Scheme);
- Labourers/general operatives (91%) are more likely to hold CSR (Construction Skills Register (NI)).



Workers that hold either a CSCS or CSR card were asked what colour their cards are. Figure 25 summarises the types of cards held by workers, with the CSR card colours split into sub-levels. Overall, within Northern Ireland, more than a third (37%) of those with CSR cards hold Green cars while a quarter (24%) hold Gold – Craft/Supervisor cards and around 1 in 7 hold Blue – Operative/Craft cards (14%)

Figure 25: Colour of CSCS/CSR cards held

*Base: Where CSCS or CSR cards are held *caution: small sample base*

	CSCS* %		CSR %
Red - Trainee	0	Red - Apprenticeship/Trainee	6
Red - Experienced worker card	0	Red - Trained Plant Operator	2
		Red – Trainee Supervisor	1
Green – construction site operative card for general site workers	18	Green – Construction Operative (for general site workers)	37
Blue – skilled	55	Blue – Operative/ Craft	14
		Blue – Plant Operator	5
		Blue – Basic Scaffolder	1
Gold - supervisor card	9	Gold - Craft/Supervisor Card	24
Gold - Advanced craft/skilled worker	9	Gold - Advanced Scaffolder	2
		Platinum – Manager Card	1
Black - contracts manager card	9	Black - Senior Managers Card	2
Other	0	Other	2
Unsure	0	Unsure	5
<i>Unweighted bases</i>	<i>11</i>		<i>132</i>

Q13/Q14



As expected, younger workers are more likely to hold Red Apprenticeship/Trainee cards (44% of 16 to 19 year olds with a CSR card), while older workers are more likely to hold Gold – Craft/Supervisor cards (34% of 45+ year olds). Self-employed workers are twice as likely as those employed directly to hold a Gold CSR card (35%, compared to 17%).

Card colours also vary significantly according to current occupation/trade, as Figure 26 summarises. Some significant differences include that labourers/general operatives are most likely to hold Green CSR cards (57%); and bricklayers are most likely to hold Gold – Craft/Supervisor cards (44%).

Figure 26: Colour of CSR card held, by current occupation

Base: Where currently hold a CSR card

**caution: small sample base*

	<i>Unweighted bases</i>	Red: Appren- ticeship/ Trainee %	Green %	Blue – Operative/ craft %	Blue – Plant operator %	Gold – Craft/ Supervisor %	Gold – Advanced Scaffolder %
Labourer/Gen. Op.	21	5	57	24	0	10	0
Plant/Mach. Op.*	18	0	33	6	33	6	0
Carpenter/ Joiner*	18	17	33	17	0	33	0
Bricklayer	27	11	11	15	4	44	4



Construction qualifications held

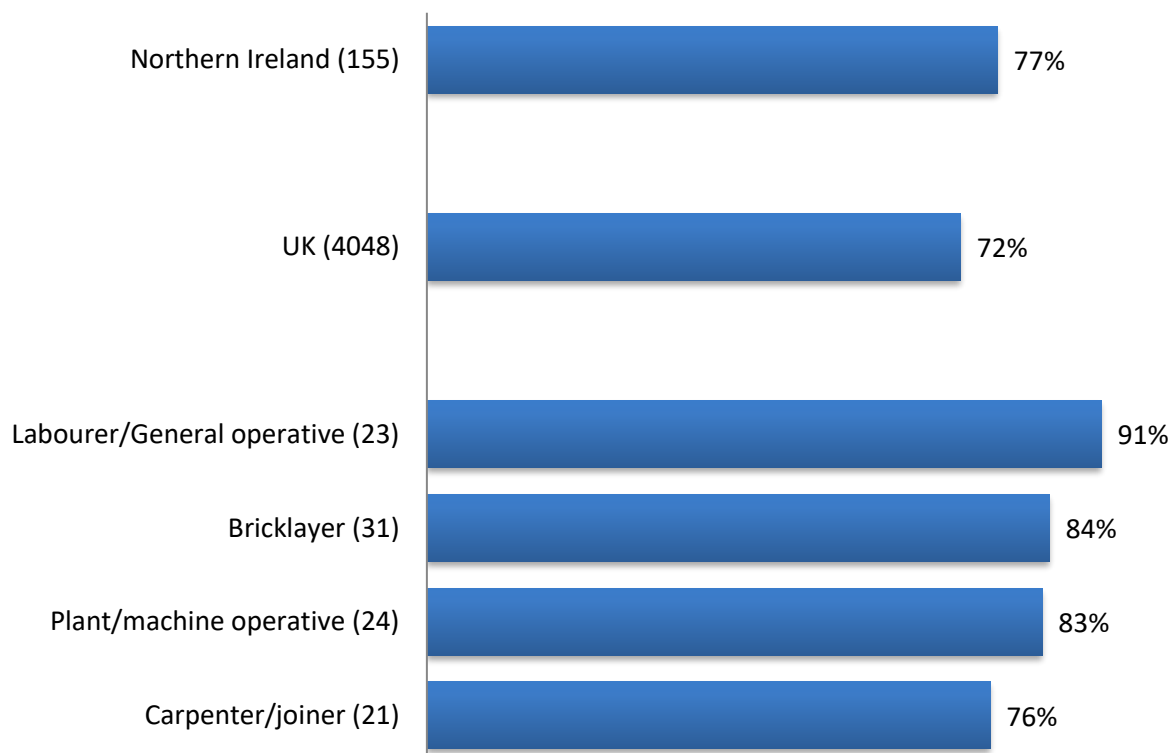
All workers were asked about the construction-specific qualifications they held after leaving full-time education and starting their first proper job in construction.

Overall, 77% of construction workers in Northern Ireland say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 73% in 2015 and 72% of all UK construction workers in 2018/19.

By current trade/occupation within Northern Ireland, the proportion of workers that started their construction careers with no formal qualifications is highest amongst labourers/general operatives (91%) and lowest among carpenters/joiners (76%).

Figure 27: Proportion of workers that had no formal construction-specific qualifications when they started their first proper job in construction, since leaving full time education, by occupation

Base: All respondents



Unweighted bases in parentheses Q15/Q16



After being asked about the qualifications they had when they first started their career, all workers were asked what other formal qualifications relevant to construction they have gained since starting in the industry. By combining the responses to both these questions we are able to derive the highest level of construction qualification held at the time of interview, including the type of qualification, the subject of the qualification, and the level.

Overall, more than half of Northern Ireland construction workers reported holding some sort of construction related qualification at the time of interview (55%), compared with a lower proportion in 2015 (45%). Compared with the UK average, Northern Ireland construction workers were less likely to hold some sort of construction-related qualification at the time of the interview (72% across the UK).

As Figure 28 summarises, the proportion of workers that hold any qualifications is lower than average amongst those who have worked in construction for less than a year (11%; compared with 25% in 2015).

Figure 28: Proportion of workers that hold any construction-specific qualification

*Base: All respondents *caution: small sample base*

		NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
Total (155)		55	45	56	46	72
Age	16 to 19 years* (10)	40	27	17	48	52
	20 to 24 years (20)	50	68	68	62	63
	25 to 44 years (73)	60	54	61	53	74
	45+ years (52)	54	27	49	18	76
Length of time in construction	<1 year* (9)	11	25	0	16	34
	1 to 2 years* (6)	67	50	0	41	52
	2 to 5 years* (18)	50	67	75	48	63
	5+ years (122)	59	46	57	48	79
Current contract type	Employed directly (81)	57	42	53	43	75
	Self- employed (72)	56	53	59	58	73
	Agency* (1)	0	29	0	N/A	49
<i>Unweighted bases for 2018/19 Northern Ireland in parentheses</i>						

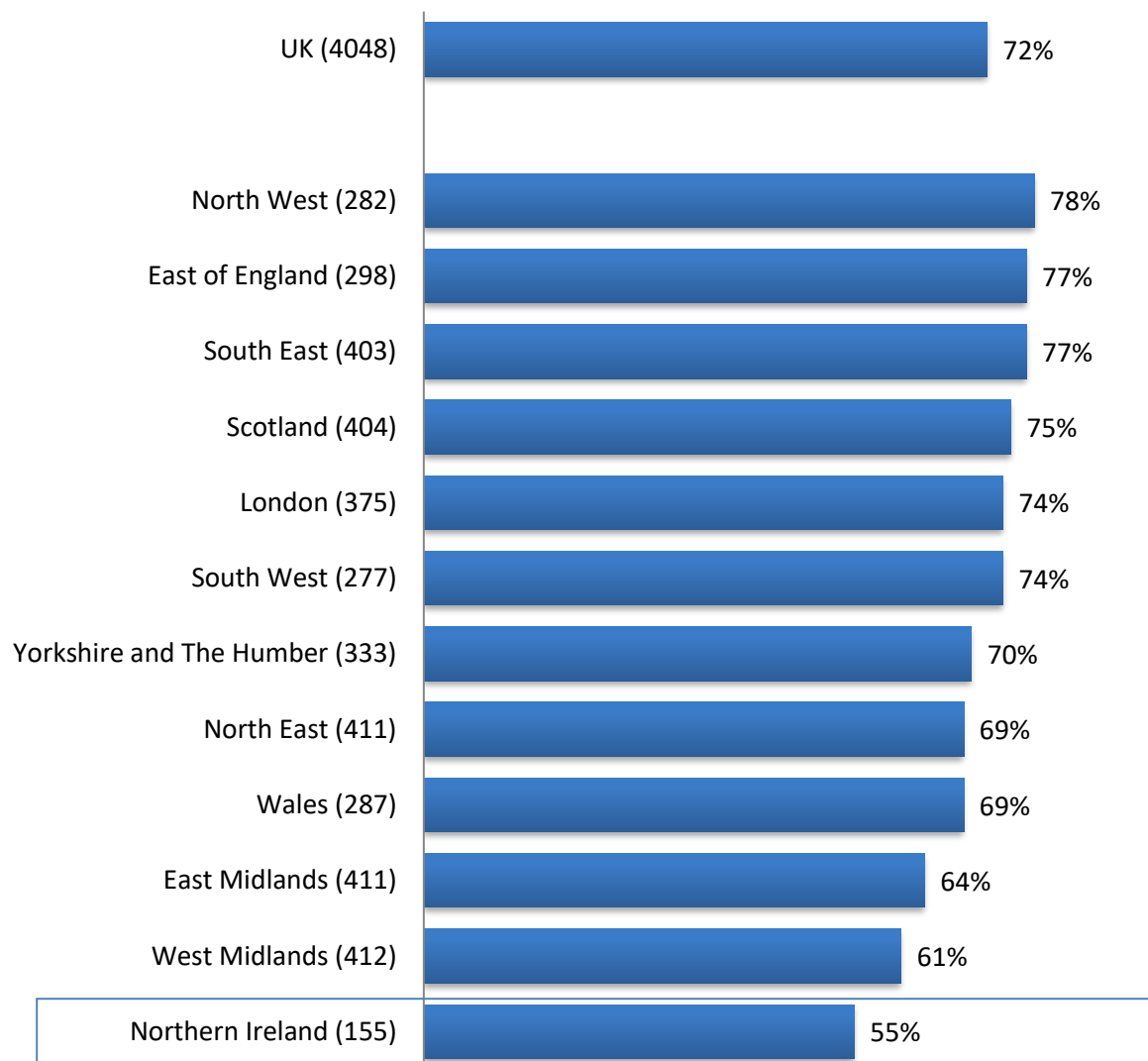
Q15/Q16



Northern Ireland is below the UK average and, compared with other regions/nations, its construction workforce is least likely to hold any construction-specific qualifications (see Figure 29).

Figure 29: Proportion of workers that hold any construction-specific qualification, by region/nation

Base: All respondents



Unweighted bases in parentheses Q15/Q16

The likelihood that workers hold any qualification also varies significantly by current job role. Plant/machine operatives (67%) are more likely than average to hold qualifications. Only 1 in 6 labourers/general operatives (17%) hold any.



Type of construction qualifications held

Based on the qualifications that workers had when they first started working in the construction industry and any they have gained since, Figure 30 summarises the types of qualifications that workers hold and compares the figures to the 2015 survey (amongst those who have any qualifications and who provided a response).

The qualifications most likely to be held by construction workers are NVQ/SVQ qualifications (62%), which is higher than the proportion reported in 2015 in Northern Ireland (51% in 2015) and the UK 2018/19 average (58%). One in six Northern Ireland construction workers with qualifications holds City & Guilds qualifications (18%), a lower proportion than in 2015 (22%), but slightly higher than the UK 2018/19 average (14%). In Northern Ireland, 12% of construction workers with qualifications hold an apprenticeship. This is a higher proportion than in 2015 within Northern Ireland and higher than the UK average in 2018/19 (6%).

Figure 30: Main type of qualification held

Base: Workers with qualifications (valid responses)

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
NVQ/SVQ	62	51	73	61	58
City & Guilds	18	22	20	25	14
Apprenticeship	12	2	1	6	6
HNC/HND/BTEC Higher	7	5	1	2	6
Degree	4	13	2	0	7
Other	6	17	2	2	24
<i>Unweighted bases</i>	<i>68</i>	<i>116</i>	<i>135</i>	<i>112</i>	<i>2122</i>

Q15/Q16



Additional formal training

Self-assessment of basic skills needs

Given the need for construction workers to read instructions and record information it is important to ensure that the workforce has the skills required to perform these tasks. The survey therefore asked all workers whether or not they perceive the need for training in any basic skills to help with their work.

Overall, 1 in 10 construction workers in Northern Ireland believes they would benefit from some form of training in basic skills (10% cf. 17% in 2015, 16% in 2012 and 17% in 2007). The 2018/19 figure is similar to the UK average (11%).

In terms of the type of training required workers are most likely to identify Maths (8%), while there is an almost even split between reading and writing. Just 2% identify the need for training in speaking English, as Figure 31 summarises.

Figure 31: Self-assessed need for training in basic skills

Base: All respondents

	NI 2018/19	NI 2015	NI 2012	NI 2007	UK 2018/19
	%	%	%	%	%
ANY	10	17	16	17	11
Reading	4	6	7	10	5
Writing	5	8	7	8	5
Speaking English	2	5	4	14	6
Maths	8	9	9	7	5
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>406</i>	<i>263</i>	<i>4048</i>

Q37



Current study for additional construction qualifications

Overall, 12% of all construction workers in Northern Ireland are currently working towards a formal qualification relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 7% in 2015, 6% in 2012 and a UK average in 2018/19 of 15%.

As in previous surveys, the likelihood that workers are currently working towards qualifications is significantly higher amongst the youngest workers (60% of 16 to 19 year olds) and amongst those who have worked within the construction industry for less than a year (56%). Workers employed directly (21%) are also more likely than those who are self-employed (1%) to be currently working towards a qualification. Of those who have no qualifications, currently 12% are working towards one. Figure 32 summarises these findings.

Figure 32: Proportion working towards additional construction qualifications

Base: All respondents

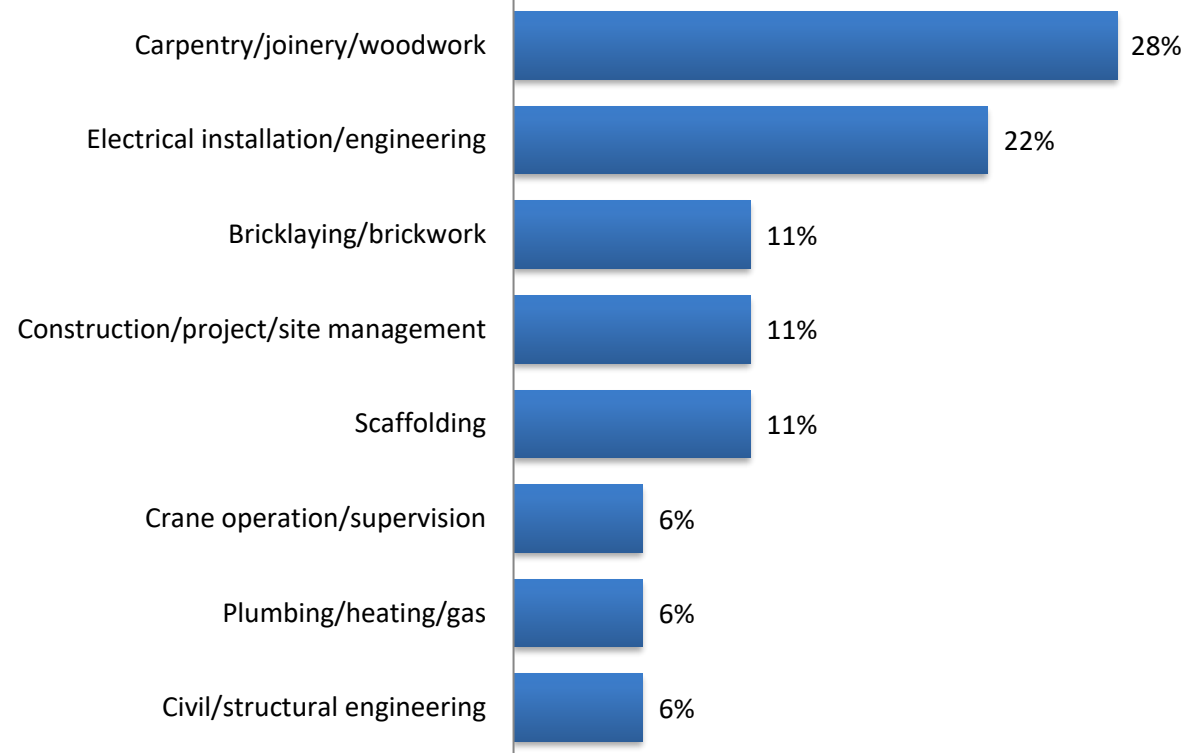
		NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
Total (155)		12	7	6	17	15
Age	16 to 19 years* (10)	60	45	56	N/A	55
	20 to 24 years (20)	40	22	13	N/A	24
	25 to 44 years (73)	4	4	3	3	14
	45+ years (52)	2	1			6
Length of time in construction	<1 year* (9)	56	25	0	68	38
	1 to 2 years* (6)	33	11	0	59	31
	2 to 5 years* (18)	39	19	35	39	25
	5+ years (122)	3	4	1	4	9
Contract type	Employed directly (81)	21	7	N/A	N/A	20
	Self- employed (72)	1	2	N/A	N/A	9
	Agency* (1)	0	14	N/A	N/A	11
Highest qualification level	None (69)	12	5	N/A	N/A	16
	Level 1* (2)	50	17	N/A	N/A	27
	Level 2* (18)	17	3	N/A	N/A	12
	Level 3 (31)	10	10	N/A	N/A	14
	Level 4+* (3)	0	14	N/A	N/A	21
Unweighted bases for 2018/19 Northern Ireland in parentheses						

Q18



Of those who are currently studying for a qualification, the most popular type of qualification is an NVQ/SVQ (28%). In terms of the subject of the qualifications being worked towards carpentry/joinery/woodwork (28%) followed by electrical installation/engineering (22%) are most popular, as Figure 33 illustrates.

Figure 33: Subject of qualification being worked towards
Base: Where working towards a qualification



Unweighted base = 18 Q19



Supervisory and managerial qualifications and training

As reported earlier, around a fifth of all construction workers in Northern Ireland perform a supervisory or management role at their site (21%). Amongst those who do not currently perform supervisory/management roles, around 1 in 4 want to become a supervisor or manager in the future but have not done it before (23%) and a further 3% want to be a supervisor/manager and have done it before. One in ten workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (10%), while around 2 in 3 are certain that they do not want to be (65%).

The likelihood that workers want to be supervisors/managers also diminishes amongst those that have worked in the industry for at least 5 years, with 73% of those having worked in construction for 5+ years not wishing to be supervisors/managers. Analysis by contract type reveals that those who are employed directly are more likely than the self-employed to want to be a supervisor/manager (33%, compared to 18%).

Figure 34: Whether those who are not currently supervisors want to be one in the future

Base: Where do not perform supervisor/management roles on site

**caution: low sample base*

		Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
Northern Ireland (119)		23	3	65	10
UK (2824)		24	6	51	20
Age	16 to 19 years* (10)	20	0	70	10
	20 to 24 years (18)	44	6	28	22
	25 to 44 years (56)	25	4	61	11
	45+ years (35)	9	0	89	3
Length of time inc construction	<1 year* (8)	13	0	63	25
	1 to 2 years* (5)	40	0	60	0
	2 to 5 years* (18)	50	6	28	17
	5+ years (88)	17	2	73	8
Contract type	Employed directly (61)	30	3	56	11
	Self- employed (57)	16	2	75	7
	Agency* (1)	0	0	0	100
Highest qualification level	No Qualifications (55)	22	2	65	11
	Level 1* (2)	0	0	100	0
	Level 2* (18)	17	0	72	11
	Level 3 (21)	43	10	33	14
	Level 4+* (2)	0	0	100	0
<i>Unweighted bases for 2018/19 Northern Ireland in parentheses</i>					



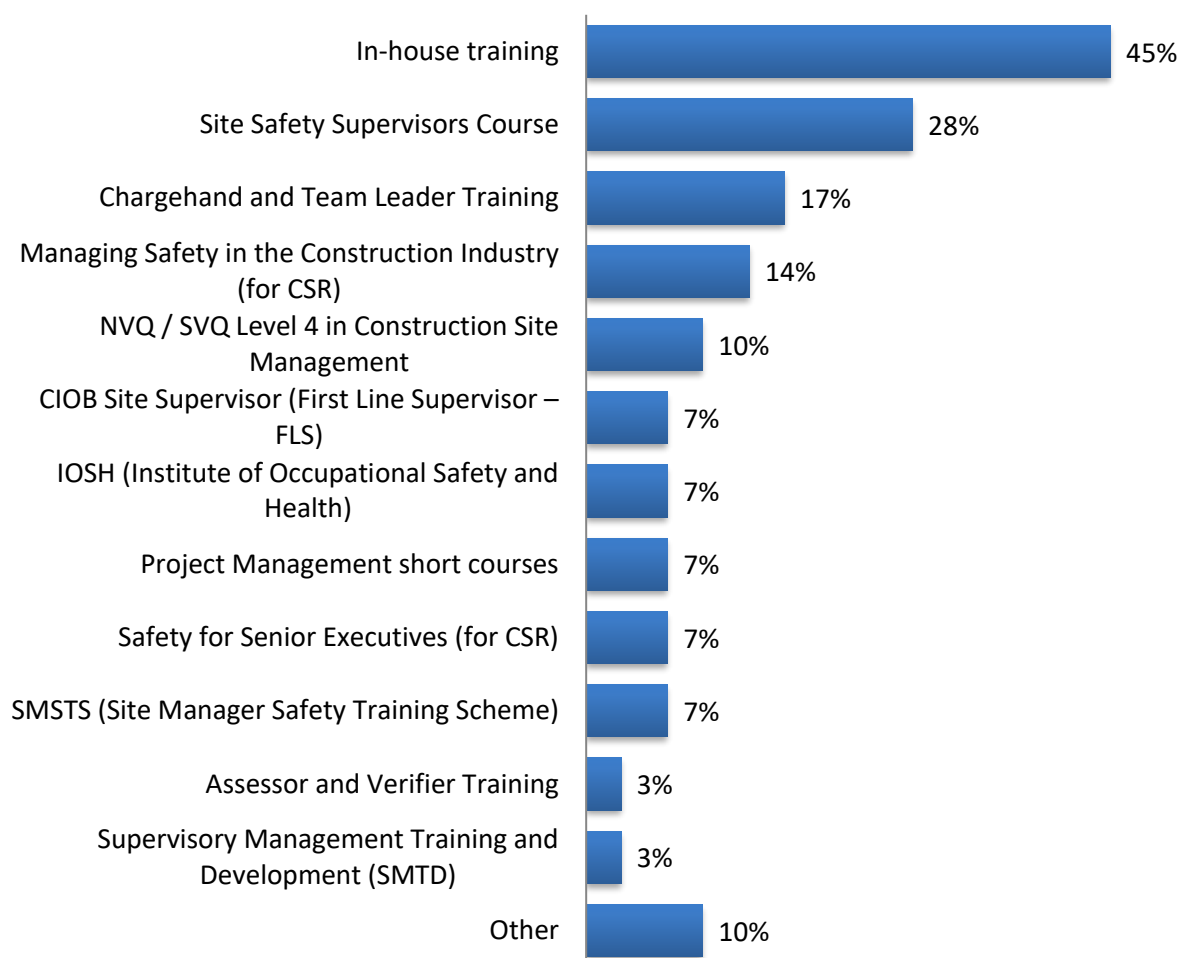
One in five construction workers in Northern Ireland (19%; 34% across the UK) and three-fifths of those who have had some form of supervisory or management responsibilities (61% cf. 59% in 2015, 52% in 2012 and 81% across the UK in 2018/19) have received any formal training designed to improve managerial or supervisory knowledge or skills.

The proportion that has undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years than those that have worked in the sector for less time (22%, compared with 6%). Construction workers employed directly are more than twice as likely as the self-employed to have received formal training in this area (26%, compared with 11%).

In terms of the types of supervisory/managerial training undertaken the proportions mentioning each type are summarised in Figure 35. In-house training is most frequently mentioned (45%), with around a quarter of those that have received training mentioning Site Safety Supervisors Courses (28%).

Figure 35: Types of managerial/supervisory training undertaken

Base: Where received formal training designed to improve managerial or supervisory knowledge or skills



Unweighted base = 29

Q11



Overall skill levels

An overview of the qualification and skill levels of construction workers has been derived by combining data from various separate measures and is presented in Figure 36 below.

As in previous surveys, the vast majority of construction workers in Northern Ireland (98%) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): only 2% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification.

Just over a third of the workforce (37%) hold a skill card/certificate, but have no other construction qualification, this is lower than in previous years (42% in 2015; 67% in 2012 and 45% in 2007), but significantly higher than the UK average (22%)

Figure 36: Qualification status summary

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	98	93	100	90	99
Holds a formal construction qualification or a skills card/certificate	98	93	100	89	98
Holds a skills card/certificate	97	90	100	84	97
Holds a skills card/certification but no other qualification	37	42	67	45	22
Working towards a qualification	12	7	6	10	15
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>406</i>	<i>263</i>	<i>4048</i>

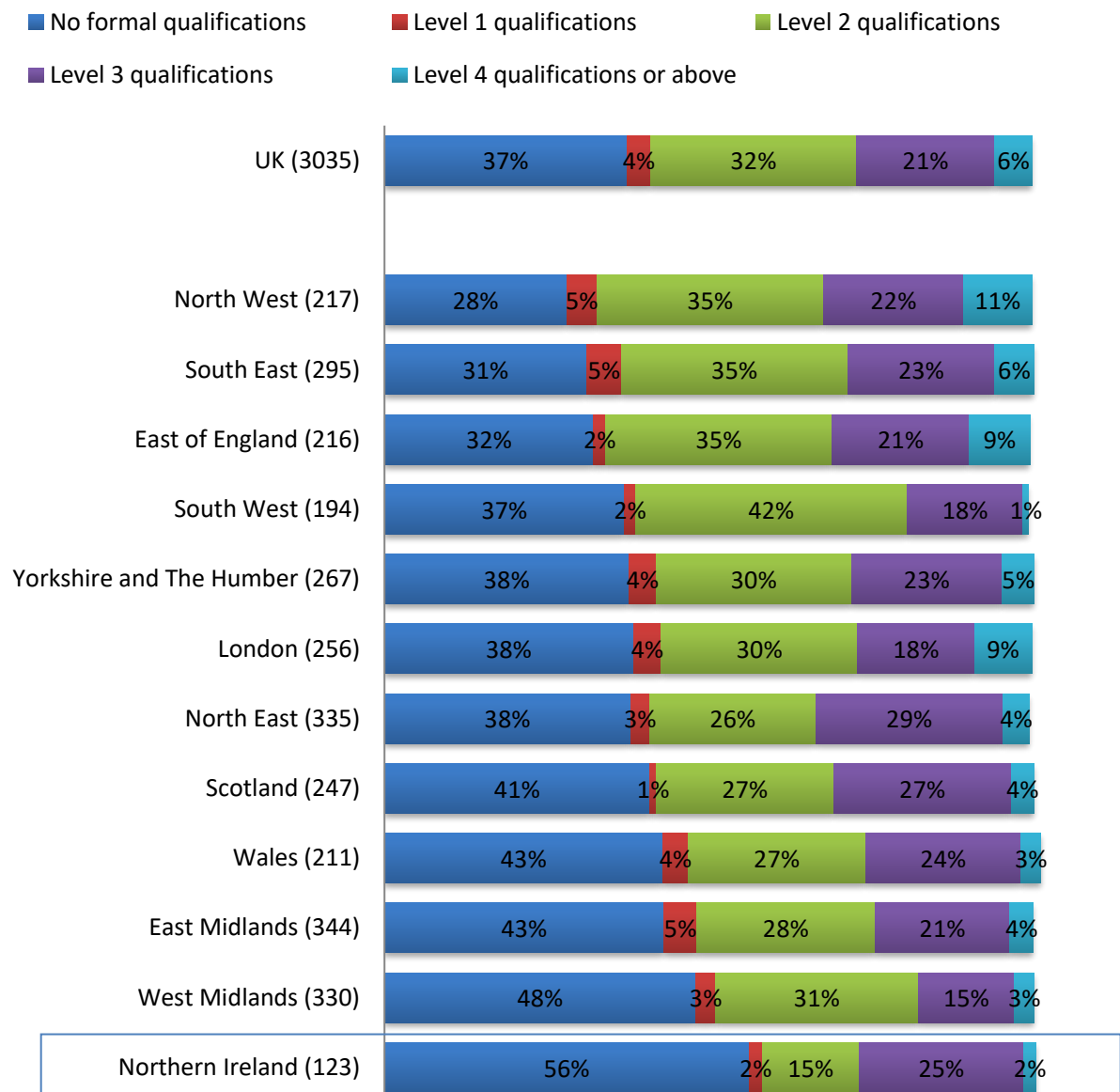
Based on all questions relating to qualifications, it is possible to calculate each worker's highest qualification level. Around 1 in 5 Northern Ireland construction workers (21%) did not provide sufficient information for their level of qualification to be calculated. Overall, more than two-fifths of construction workers in Northern Ireland providing a response have qualifications equivalent to Level 2 or above (42%, cf. 43% in 2015; 59% across the UK in 2018/19). Over a quarter hold qualifications equivalent to Level 3 or above (28% cf. 29% in 2015 and 27% across the UK in 2018/19).



Analysis by region/nation reveals that while the proportions that hold qualifications at Level 1 or at Level 4 and above are generally quite similar, the proportions that have Level 2 or 3 qualifications and no qualifications vary quite considerably. These variances are summarised in Figure 37, which highlights that the construction workforce in Northern Ireland is below the UK average in this respect and in fact are least likely, compared with those in other regions/nations, to have any formal qualifications.

Figure 37: Current qualification level, by region/nation

Base: All respondents who provided a valid response



Unweighted bases in parentheses

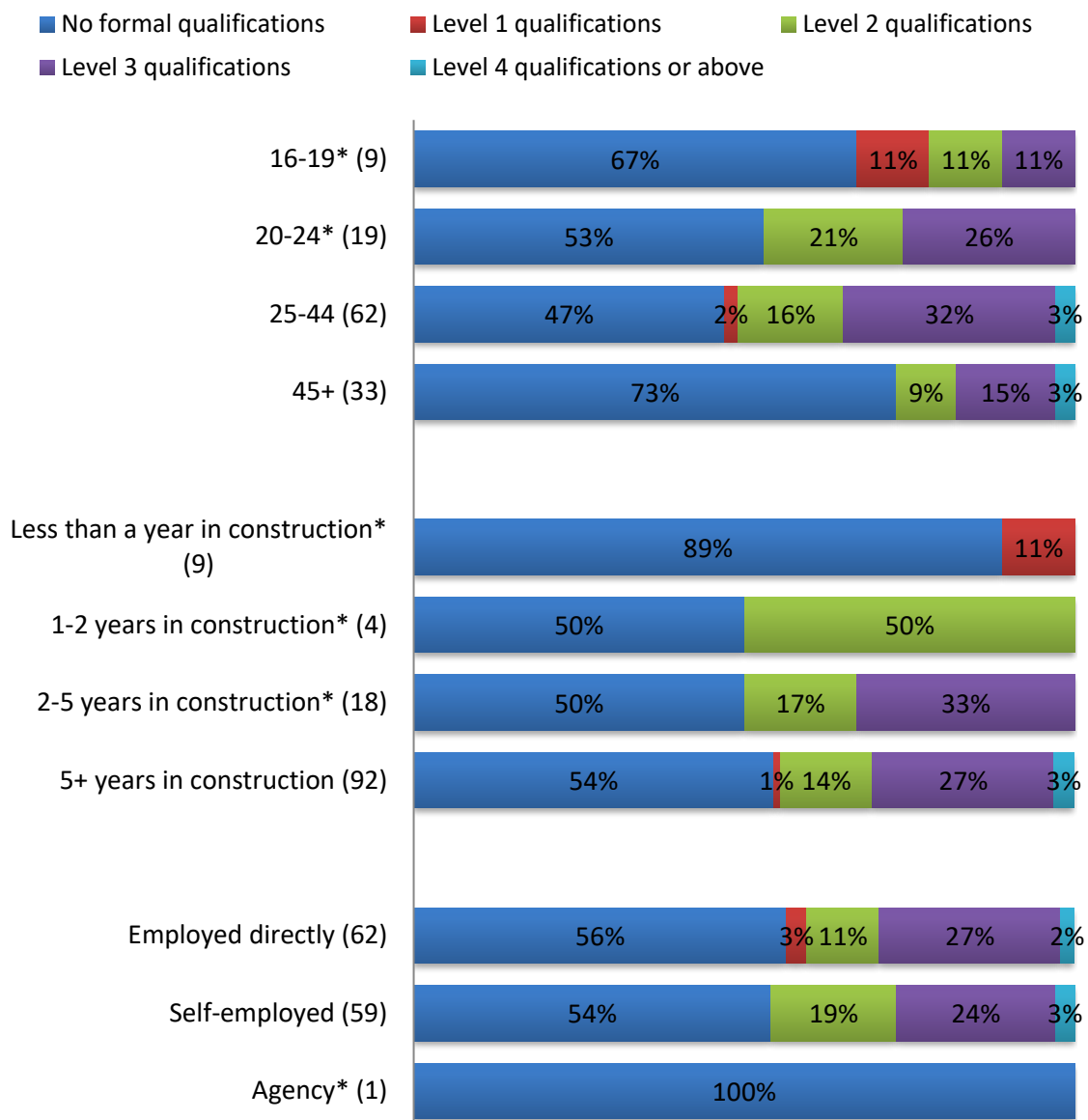


Workers aged 25 to 44 are most likely to have qualifications equivalent to Level 3 or above (35%, compared to 21% of those aged 16 to 24 and 18% of those aged 45+). Workers that have worked in construction for 5+ years are more likely than those having spent less time in the industry to have qualifications at Level 3 or 4+ (30%, compared with 19% that have less than 5 years' experience).

Figure 38 illustrates these variations and levels of qualifications held by other key variables.

Figure 38: Current qualification level, by other key variables

Base: All respondents who provided a valid response



Unweighted bases in parentheses Q15/Q16



Geographic mobility

This section of the report on geographic mobility helps to identify which regions/nations of the UK are net 'importers' or 'exporters' of construction workers, as well as which elements of the construction workforce are the most mobile (based on region/nation of residence, region/nation of birth and type of contract). The measures included in this section are:

- Reasons for working in current location;
- Comparisons of current location, with workers' region/nation of origin;
- Proportion of construction workers' career that has been spent working in the current region/nation;
- Whether current site is commuted to daily from their permanent address or temporary accommodation is used;
- Miles travelled to site each day;
- Whether next site is commutable or requires temporary accommodation.

Work history in the current region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. Within Northern Ireland, the most likely reason for working in a region/nation is because they grew up there/have always lived there (70%). This is mentioned more frequently than the UK average (43%). The next most frequently cited reason is that their employer sent them there (32%). Reasons given in 2018/19 within Northern Ireland are very similar to those given in 2015.

Figure 39: Reasons for choosing to work in current location

Base: All respondents

	NI 2018/19 %	NI 2015 %	UK 2018/19 %		NI 2012 %
You grew up here/have always lived here	70	65	43	Family	10
Family reasons	12	12	5		
Employer sent you here	32	29	51	Employer sent me	24
Came to the area to take up this or another job	3	2	3	More regular opportunities	38
There are more jobs available in this area	4	4	5	More jobs here	19
Construction work is better paid in this area	1	<0.5	3	Better paid jobs	3
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	1	1	2	Prefer living here	3
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>4048</i>		<i>406</i>

Q28

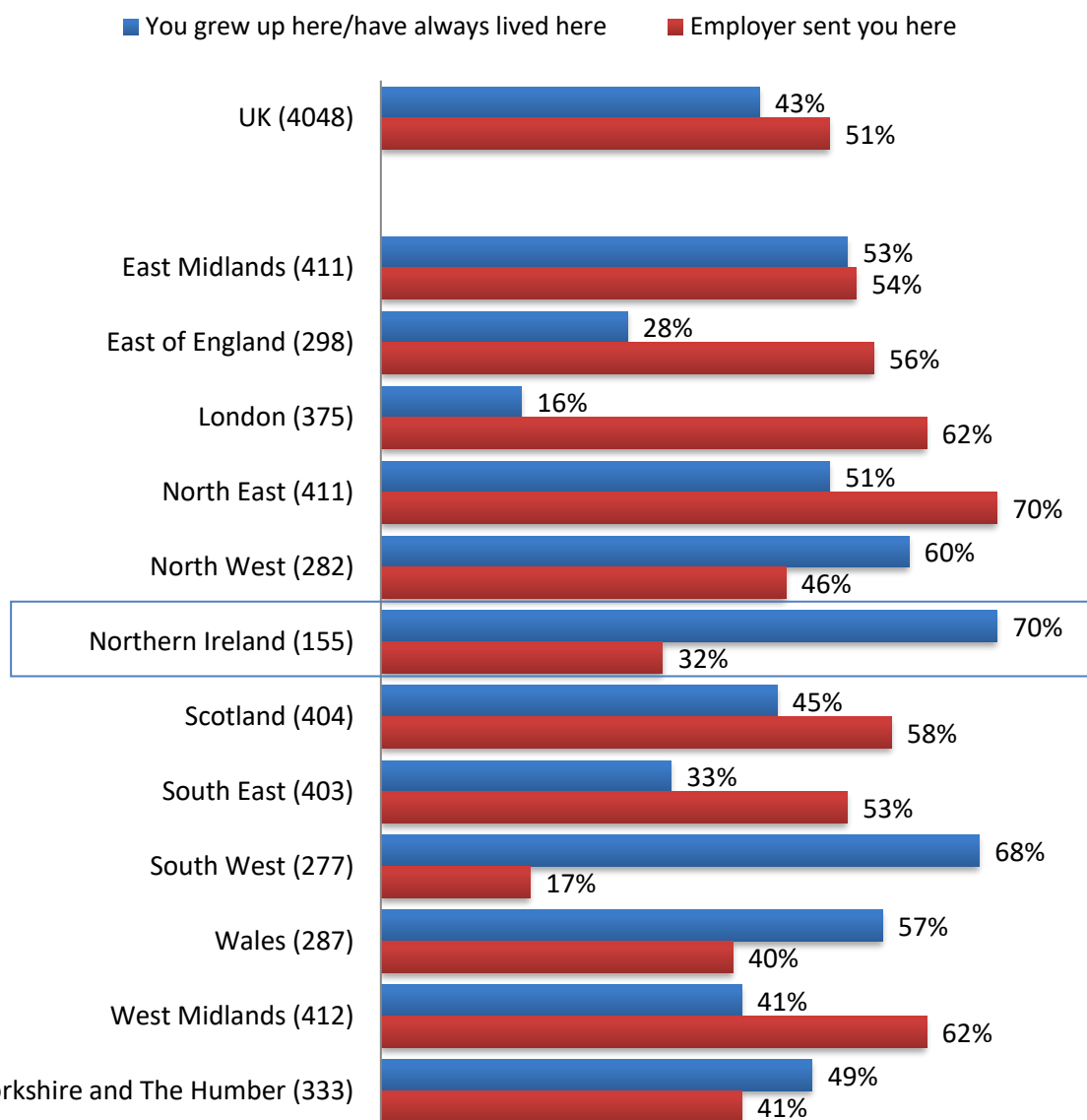


Workers over the age of 60 are more likely than younger workers to state that they work in their current location because that's where they have always lived/grew up (92%, compared to 68% of 16 to 59 year olds). Younger workers are more likely to say that their employer sent them there (50% of 16 to 24 year olds)

There are significant differences by region/nation in the proportions that give these two main reasons for working in their current location. These differences are summarised in the following figure. Construction workers in Northern Ireland are more likely than the UK average to cite having always lived there, and less likely to say their employer sent them.

Figure 40: Top two reasons for deciding to work in their current region/nation, by region/nation

Base: All respondents



Unweighted bases in parentheses Q28



More than half of all workers in Northern Ireland have worked within this region for their entire construction career (57%), which is a higher proportion compared to 2015 (45%) but a lower proportion than in 2012 (73%). With a further 34% that have remained in this region most of the time, this means that the majority of all workers have remained in Northern Ireland for all or most of the time (92%) and this is higher than the 2018/19 UK average (77%).

Figure 41: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
All of your time	57	45	73	64	44
Most of it	34	36	19	28	33
Around half your time	3	8	4	4	9
A small proportion of your time	3	8	2	3	10
Only on this job (this is the first site you've been to in this region/nation)	1	1	0	1	2
Don't know	1	2	1	0	1
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>406</i>	<i>263</i>	<i>4048</i>

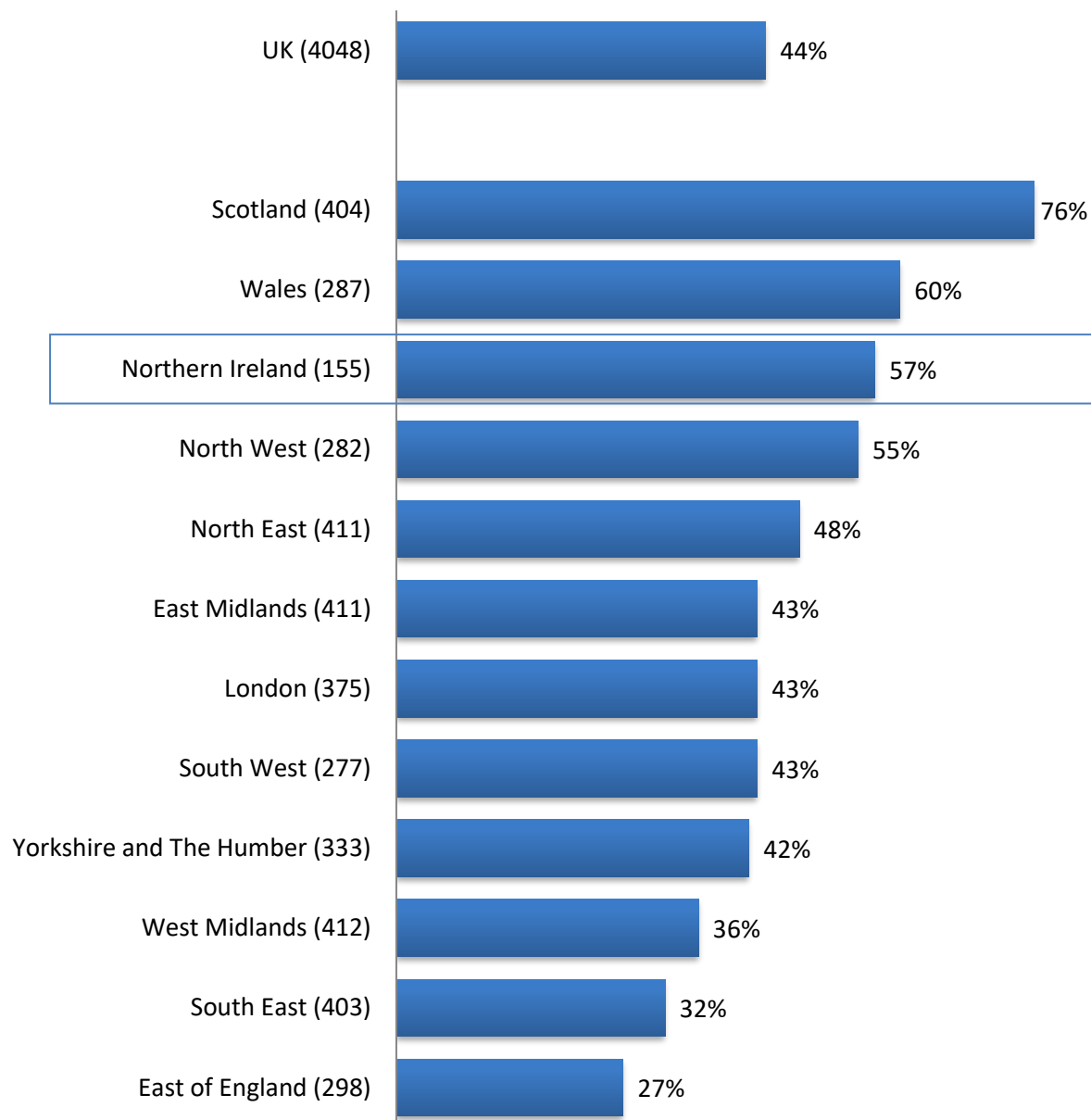
Q26



The proportion of construction workers in Northern Ireland that have spent all of their time in the region is higher amongst younger workers (77% of 16 to 24 year olds) and similarly high amongst those that have worked in the construction industry for the shortest period of time (78% of those that have worked in the industry for less than a year and all of those that have worked in the industry for between 1 and 2 years, although the base size for both of these is low).

Figure 42: Proportion of workers that have spent all their time in this current region/nation

Base: All respondents



Unweighted bases in parentheses Q26



The proportion of workers that reported their employer operates (takes on construction contracts) only within particular regions/nations, nationwide or internationally is shown in Figure 43. In Northern Ireland, a quarter (25%) indicate their employer operates nationwide, with two-thirds (69%) stating that their employer operates in particular parts of the UK including Northern Ireland, while 7% are unsure and a quarter (25%) indicate that their employer operates in other parts of Europe, which would include the Republic of Ireland.

Figure 43: Region/nation employer operates in (takes on construction contracts), compared with region/nation working in currently

Base: All respondents

*denotes less than 0.5%

Region/nation employer operates in	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands (EM)	54	4	2	*	1	0	0	2	1	1	10	2
East of England (EE)	2	20	6	*	1	0	*	6	1	1	2	1
London (GL)	2	11	22	*	2	0	0	9	2	1	2	1
North East (NE)	1	*	2	46	1	1	0	*	1	1	2	2
North West (NW)	1	*	2	1	29	0	0	1	*	1	3	2
South East (SE)	2	8	9	*	1	1	0	26	7	*	2	1
South West (SW)	1	0	2	*	1	0	0	5	60	3	3	*
West Midlands (WM)	8	0	2	*	1	0	0	2	3	2	27	2
Yorkshire & Humber (YH)	4	3	2	2	2	0	0	1	1	1	2	32
Northern Ireland (NI)	1	1	2	0	*	69	0	*	*	*	0	0
Scotland (SC)	1	*	1	1	1	2	24	*	1	*	1	0
Wales (WA)	1	0	1	0	2	0	*	1	3	53	2	0
Nationally	42	69	74	52	69	25	76	66	37	45	66	66
Other parts of Europe	*	*	1	1	3	25	0	1	*	0	1	*
Outside of Europe	0	1	1	*	*	1	0	2	0	0	*	1
Other / Unsure	3	3	6	*	*	7	0	5	2	2	3	1
Unweighted bases	411	298	375	411	282	155	404	403	277	287	412	333

Q25



Region/nation worked in before current site

Thinking about the last construction site they worked on, before this one, in the majority of cases, workers' last sites were in the same region/nation as they are working in now. However, the extent to which this is the case varies considerably by region/nation, as Figure 44 illustrates. Similarly to 2015, construction workers in Northern Ireland are amongst those most likely to state that their last site was in the same region/nation (93%) and the proportion is higher than in 2015 (86%). Only those workers based in Scotland are more likely to report their last site was in the same region/nation (98%).

Figure 44: Region/nation of last site before this current one

Base: Where had previous job(s) *denotes less than 0.5%

Region/nation of last site	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands (EM)	79	2	*	1	0	0	0	4	*	0	16	4
East of England (EE)	4	52	6	1	0	0	0	11	1	*	1	*
London (GL)	4	31	73	2	*	1	*	14	4	*	1	3
North East (NE)	0	*	0	90	0	1	*	0	0	*	1	2
North West (NW)	1	0	*	2	91	1	0	1	1	*	4	3
South East (SE)	1	11	16	0	0	1	*	62	8	1	2	*
South West (SW)	1	1	*	0	0	0	*	3	81	4	1	1
West Midlands (WM)	7	1	1	0	*	1	1	3	*	0	71	2
Yorkshire & Humber (YH)	3	0	1	2	2	1	0	*	*	0	1	83
Northern Ireland (NI)	0	0	1	0	1	93	1	0	0	0	0	0
Scotland (SC)	0	*	1	2	1	2	98	0	*	*	*	1
Wales (WA)	0	*	*	0	2	0	0	1	2	88	1	0
Republic of Ireland	0	0	*	0	0	0	0	0	0	0	0	*
Other parts of Europe	0	0	0	0	*	0	0	0	0	0	1	0
Outside of Europe	0	0	0	0	1	1	0	0	0	0	0	0
Other / Unsure	1	2	1	*	1	0	0	1	1	6	1	*
Unweighted Bases	347	284	353	283	243	151	369	382	251	256	366	304

Q32



Worker origins

Workers were asked which region/nation they were living in just before they got their first job in construction in the UK. Nearly all construction workers in Northern Ireland were living in Northern Ireland when they started their construction career (95% cf. 97% in 2015). Again, only workers in Scotland are more likely to have been living in that nation just before they got their first job (96%). Figure 45 summarises this data.

Figure 45: Inter-regional/national movement during construction careers

Base: All respondents who provided a valid response *denotes less than 0.5%

Original home	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands (EM)	82	6	2	0	*	0	*	9	*	1	12	2
East of England (EE)	1	44	6	*	0	0	0	9	2	0	1	1
London (GL)	2	26	59	1	3	0	0	13	6	1	1	4
North East (NE)	1	*	*	93	0	0	*	1	*	1	*	5
North West (NW)	1	*	1	1	87	1	*	1	1	0	4	2
South East (SE)	1	14	15	*	1	1	0	51	5	0	1	1
South West (SW)	*	1	*	*	1	1	0	4	76	1	1	*
West Midlands (WM)	7	2	2	0	*	0	0	5	1	*	71	1
Yorkshire & Humber (YH)	4	3	1	2	3	1	*	2	1	1	2	81
Northern Ireland (NI)	0	0	4	0	1	95	*	1	0	*	0	*
Scotland (SC)	*	0	1	1	1	1	96	1	1	1	0	1
Wales (WA)	0	*	*	*	1	0	*	1	3	93	1	1
Republic of Ireland	0	*	3	0	0	0	1	*	0	0	*	*
Other parts of Europe	*	1	4	*	0	0	1	2	2	*	3	*
Outside of Europe	*	*	1	0	*	1	0	0	0	*	1	0
Other / Unsure	0	1	0	0	0	0	*	0	0	1	0	1
Unweighted Bases	411	298	375	411	282	155	404	403	277	287	412	333

Q40



Thinking next about where workers studied for their first construction qualification, Figure 46 summarises the proportion of construction workers now working in the same region/nation in which they acquired their first construction qualification. This analysis shows that while, again, there are great variations by region/nation, more than 9 in 10 construction workers in Northern Ireland (93%) achieved their first qualification there.

Figure 46: Proportion of construction workers based in the same region/nation as when their first qualification was achieved

Base: Those with a formal qualification who provided a valid response

	2018/19 %	2015 %	Higher than average mentions for other regions/nations
Scotland (304)	96	95	
Northern Ireland (87)	93	96	
North East (283)	90	92	
Wales (197)	86	83	
North West (222)	85	90	
Yorkshire & the Humber (232)	81	82	
East Midlands (264)	80	65	West Midlands 9%
South West (208)	75	76	South East 7%
West Midlands (254)	69	79	East Midlands 14%
London (277)	59	58	South East 16%, East of England 7%
East of England (230)	47	50	London 24%, South East 13%
South East (312)	41	55	London 16%, East Midlands 12%, East of England 10%
<i>Unweighted bases for 2018/19 in parentheses</i>			

Q17



Travel to site

Relative locations of current workplace to home

Across regions/nations, the majority of construction workers were interviewed on a site that was located within the same region/nation as their permanent home, but the exact proportion varied.

All construction workers in Northern Ireland are living and working in Northern Ireland (i.e. 100%). The same is true of workers in Scotland, while not all but most workers in Wales live there (98%).

Figure 47: Inter-regional/national movement from permanent residence to current site

Base: All respondents who provided a valid response

	2018/19			2015		
	% from same region/nation	% from different region/nation	% from neighbouring region/nation	% from same region/nation	% from different region/nation	% from neighbouring region/nation
Northern Ireland (145)	100	0	-	99	1	-
Scotland (196)	100	0	0	96	4	0
Wales (258)	98	2	2	93	7	5
North East (335)	96	4	4	97	3	1
North West (257)	94	6	6	88	12	12
South West (243)	94	6	6	85	15	11
East Midlands (309)	90	10	10	74	26	23
Yorkshire and the Humber (290)	88	12	9	86	14	14
West Midlands (308)	80	20	19	82	18	16
London (341)	63	37	32	71	29	25
East of England (270)	60	40	36	63	37	27
South East (362)	55	45	42	58	42	38
<i>Unweighted bases for 2018/19 in parentheses</i>						

Q52/Q54



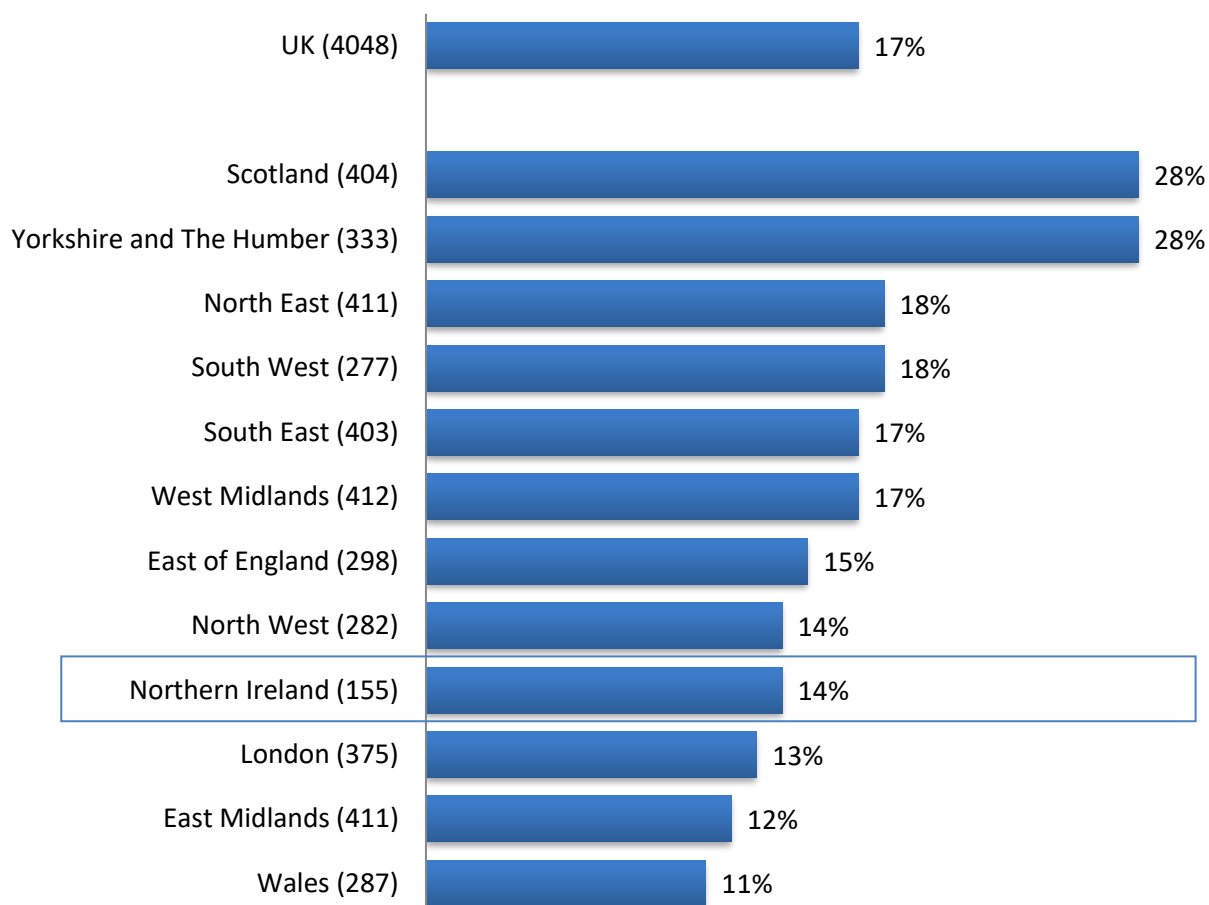
Furthest distance worked in last 12 months

All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within Northern Ireland, 1 in 3 construction workers have worked no more than 20 miles away (33%) and a quarter have worked between 21 and 50 miles away (26%). The average maximum distances travelled to work by Northern Ireland construction workers in 2018/19 were shorter than in 2015 when 24% had worked no more than 20 miles from their home, and 18% had never travelled further than between 21 and 50 miles to work. This leaves two-fifths that had worked more than 50 miles away from their permanent home (39%), with 1 in 4 that had worked between 51 and 100 miles away (25%) and 1 in 7 that had worked more than 100 miles away (14%).

Compared with workers in other regions/nations, workers based in Northern Ireland are amongst the least likely to have travelled more than 100 miles from their permanent home to work in the last 12 months.

Figure 48: Proportion of workers that have travelled more than 100 miles from their permanent home to work, in the last 12 months, by region/nation

Base: All respondents



Unweighted bases in parentheses Q29



Use of temporary accommodation

Nationally, 1 in 20 (5%: 6% in 2015) construction workers reported that they were currently staying in temporary accommodation while working at their site. By region/nation, Northern Ireland is towards the lower end of the range (3%), with the lowest proportion in the North East (1%), and the highest in London (10%).

Figure 49: Percentage of workers in temporary accommodation

Base: All respondents

	2018/19 %	2015 %
Total - UK (4048)	5	6
London (375)	10	8
South East (403)	7	6
West Midlands (412)	6	3
East of England (298)	5	11
South West (277)	3	7
East Midlands (411)	3	5
North West (282)	3	2
Yorkshire and The Humber (333)	3	4
Wales (287)	3	4
Northern Ireland (155)	3	3
Scotland (404)	2	7
North East (411)	1	4
<i>Unweighted bases for 2018/19 in parentheses</i>		

Q41/Q42

Journey distance to work

Within Northern Ireland, the average (mean) distance from workers' current residence (taking into account temporary residences) to their current site was 18 miles, which is less than the average of 30 miles reported in 2015. The Northern Ireland average is the same as the UK average.

More than two-fifths (43%) travelled less than 10 miles from their current residence to the site they work, whilst 21% travelled between 10 and 19 miles, 34% travelled between 20 and 49 miles, 3% travelled between 50 and 99 miles and none travelled more than 100 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (10% of all construction workers in Northern Ireland) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, none expect to work for less than 3 months; while 13% expect to work between 3 and 6 months; 25% between 6 months and a year and 25% expect to still be working for their current company/agency in more than a years' time. Nearly two-fifths of temporary workers in Northern Ireland did not



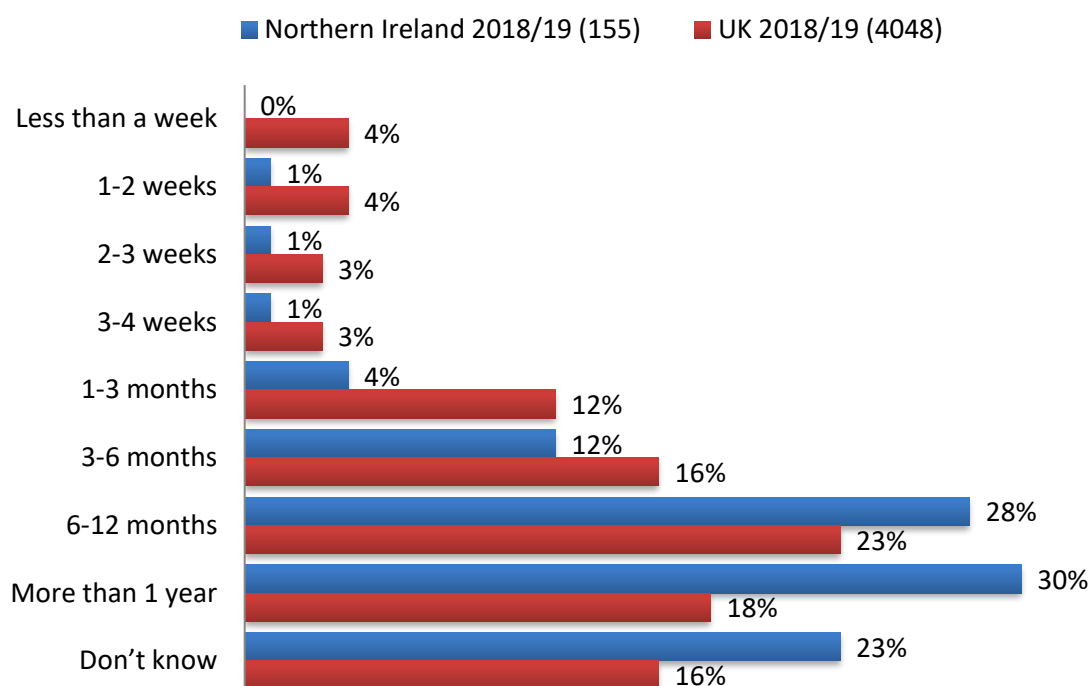
know how much longer they could expect to be working for their current company/agency (38%, as across the UK).

In order to get a measure of workplace stability amongst all workers, all respondents (whether temporary or permanent) were asked to indicate how long in total they expect to work at that specific site during this phase.

Just 3% of construction workers in Northern Ireland (19% in 2015 and 7% in 2012) do not expect to work on that site for more than a month, with none expecting to be there for a week or less. More than 2 in 5 anticipate being on site for more than a month, but less than a year (43%), while 3 in 10 expect to stay on that site for a year or longer (30%), similarly to 2015 (28%). It compares with a UK average in 2018/19 of 18%. However, in around a quarter of cases (23%, as in 2015; 20% in 2012) workers did not know how much longer they could expect to be on site, indicating that a significant minority of construction workers are living with some uncertainty and insecurity.

Figure 50: Length of time workers expect to work at that specific site during the current phase

Base: All respondents



Unweighted bases in parentheses
Q24

The youngest workers, aged 16-24 are more likely to be unsure of how much longer they can expect to work for (30% don't know, compared with 17% of 45+ year olds).

Amongst the various trades/job roles, carpenters/joiners are most likely to be uncertain how much longer they can expect to work at that site (43%).



Expected next site location

More than four-fifths of all construction workers in Northern Ireland are confident that when they finish this job they will get a job that allows them to travel from their permanent home to work on a daily basis, and this is a higher proportion than in previous surveys (86% cf. 68% in 2015 and 79% in 2012). The remainder are sure that this will not be the case (3%); that it depends where the work is (5%); or that they don't know (5%).

Construction workers in Northern Ireland are slightly above the UK average in this respect (84%).

Carpenters/joiners are least likely to be confident of this (76%), while plant/machine operatives are most confident (88%).

Workers that are certain that their next job will not be within commuting distance of their permanent home were asked to indicate which region/nation they expect to be working in next. The following figure summarises their responses by region/nation (although the base sizes within each region/nation are very small, so some caution is needed) and it gives an indication of the likely pattern of movement between regions/nations. Two-fifths of construction workers in Northern Ireland (40%) that do not expect to be able to commute daily to their next job expect to remain in Northern Ireland for their next job. The remainder are evenly split between London, the North East and Scotland (each 20%).

Figure 51: Expected location of next site/job

Base: Where workers do not expect to be able to commute daily to their next job

** denotes less than 0.5%*

Expected location of next job	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	79	0	0	0	0	0	0	0	7	0	0	0
East of England	0	21	0	0	0	0	0	8	0	0	4	0
London	11	21	85	7	0	20	0	17	7	29	7	14
North East	0	0	0	86	0	20	0	0	7	0	4	7
North West	0	7	0	0	44	0	0	8	0	0	4	7
Northern Ireland	0	0	0	0	0	40	0	0	0	0	0	0
Scotland	0	0	0	0	33	20	100	0	0	0	0	0
South East	0	7	0	0	0	0	0	25	0	0	0	0
South West	0	0	0	0	11	0	0	8	64	0	0	0
Wales	0	7	0	0	0	0	0	0	0	43	0	0
West Midlands	11	7	8	0	0	0	0	17	0	0	68	7
Yorkshire and the Humber	0	0	0	0	0	0	0	0	0	0	0	64
Outside Europe	0	0	0	0	0	0	0	0	0	0	4	0
Other / Unsure	0	29	8	7	11	0	0	17	14	29	11	0
Unweighted bases	19	14	13	14	9	5	13	12	14	7	28	14

Q31



Sub-sector and sector mobility

This final section of the report explores sub-sector mobility (movement between project types within the construction sector) and how this varies between different groups of construction workers. Attitudes towards future employment in the sector are also examined.

Sub-sector mobility

All workers were asked which (if any) of six types of construction work they have spent periods of at least 3 months at a time working in.

The vast majority of construction workers in Northern Ireland have worked on new housing (85%), which is a higher proportion than in 2015 (61%) but similar to 2012 (85%) and 2007 (82%). Compared with 2015, there has been an increase in the proportions of construction workers that have been working on all but private industrial work.

Overall, just a fifth of construction workers have only worked on one project type (21%), and this is a lower proportion than in 2015 (34%). This suggests some reduction in stability in the sector in terms of the sub-sectors in which work is available.

Figure 52: Type of projects spent significant periods on

Base: All respondents

	NI 2018/19 %	NI 2015 %	NI 2012 %	NI 2007 %	UK 2018/19 %
New housing	85	61	85	82	79
Housing repair and maintenance including extensions/loft conversions	47	34	76	37	46
Commercial work such as shops, office, pubs etc	50	44	75	41	51
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	41	44	77	29	45
Public non-housing work such as schools, sports facilities, landscaping	61	56	82	27	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	38	27	66	5	31
ONE TYPE ONLY	21	34	0	46	30
TWO TYPES	19	17	12	21	16
THREE TYPES	16	15	8	14	14
FOUR TYPES	15	16	7	6	12
FIVE TYPES	14	8	6	11	13
SIX TYPES	14	8	9	1	14
<i>Unweighted bases</i>	<i>155</i>	<i>274</i>	<i>406</i>	<i>263</i>	<i>4048</i>

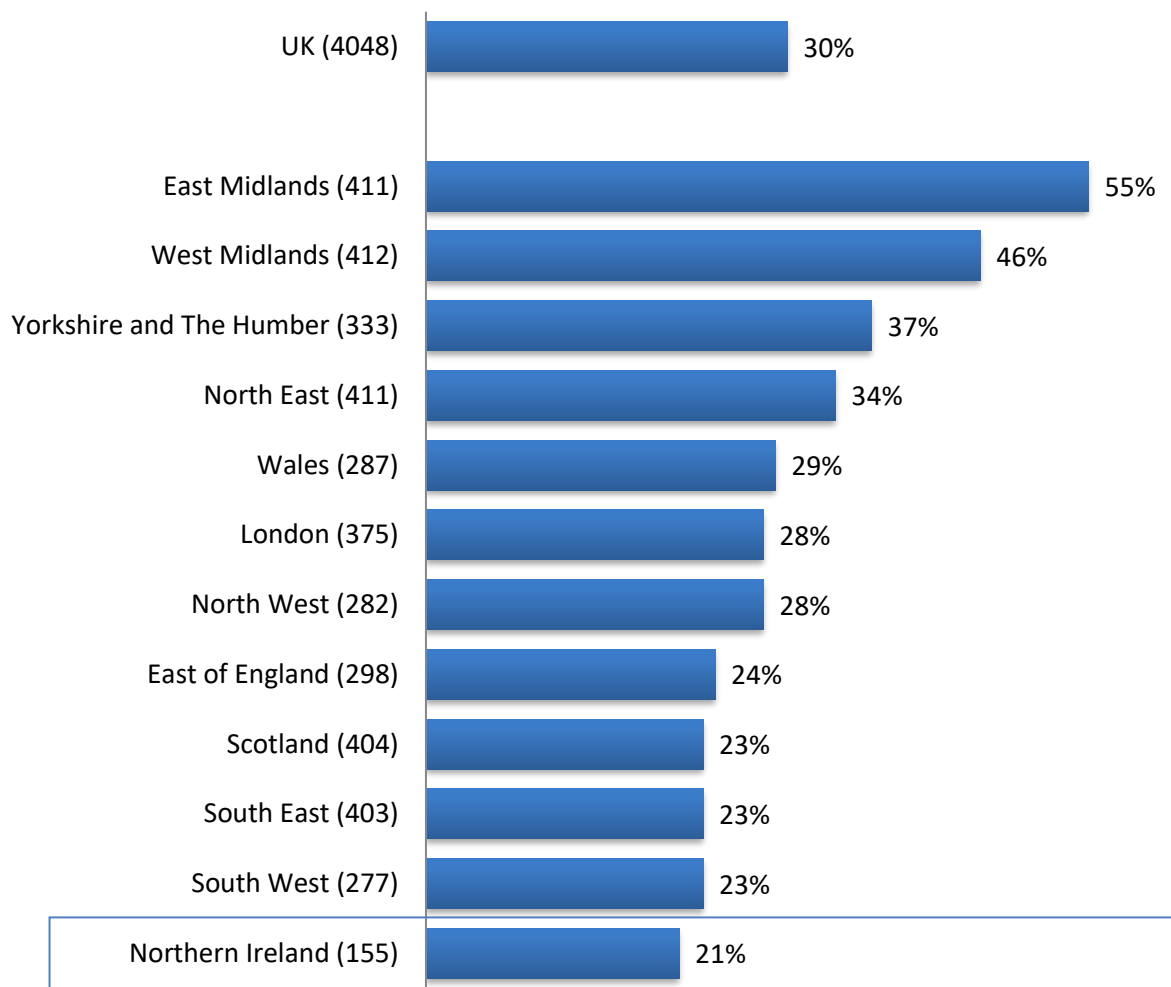
Q3/Q4



The number of project types worked on varies significantly by region/nation, as Figure 53 illustrates. Northern Ireland is the least likely region/nation to have its construction workers working on just one project type (21% cf. 30% in the UK).

Figure 53: Proportion of workers that have only worked on one project type

Base: All respondents



Unweighted bases in parentheses Q4



The likelihood that workers have worked only on one project type declines, as age increases, as one would expect (from 40% of 16 to 24 year olds). By current trade/occupation, the proportion is lowest amongst plant/machine operatives (4%) while carpenters/joiners are least likely to have worked on 5 or 6 project types (14%).

Figure 54: Number of sub-sectors worked in, by occupation

Base: All respondents

	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Bricklayers (31)	32	19	10	3	19	13
Carpenters/joiners (21)	24	14	29	19	5	10
Labourers/general operatives (23)	22	22	17	9	17	13
Plant/machine operatives (24)	4	25	13	29	13	17

Unweighted bases in parentheses Q4

Leaving the sector

In order to assess the potential outflow from the sector in the next five years (led by worker preference), all workers were asked how likely it is that in 5 years' time they will still want to be working in construction. Overall, more than three-quarters (77%) felt it was very likely or definite that they would still want to, which is a slightly higher proportion than the UK average (74%). This included, within Northern Ireland, half of construction workers that said they definitely will be (50%) and more than a quarter that think it very likely (28%). A further 8% think it quite likely that they will still be working in the sector in five years' time, while 4% considers it unlikely, just 2% say they definitely won't be, and a further 5% hope to be retired by then. The remaining 4% don't know.



Age is the predominant factor in this respect. Most obviously, the proportion that hopes to be retired in five years time increases to 13% of construction workers aged 45 and over and 38% of those aged 60 and over. The proportion that felt that they definitely or very likely would still want to work in the construction sector in five years is highest amongst the youngest workers (83% of 16 to 24 year olds).

Figure 55: Likelihood of construction workers still wanting to be working in the construction sector in five years time

Base: All respondents

	NI 2018/19 %	UK 2018/9 %	Age			
			16 to 19 %	20 to 24 %	25 to 44 %	45+ %
Definitely will be	50	48	40	55	48	52
Very likely	28	26	40	30	32	19
Quite likely	8	11	0	10	11	4
Quite unlikely	3	2	0	5	1	4
Very unlikely	1	2	10	0	0	2
Definitely will not be	2	1	0	0	4	0
Hope to be retired	5	4	0	0	1	13
Don't know	4	5	10	0	3	6
<i>Unweighted bases</i>	<i>155</i>	<i>4048</i>	<i>10</i>	<i>20</i>	<i>73</i>	<i>52</i>

Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 52% believe they will definitely want to be working in the construction sector, 27% believe it is very likely they will want to be working in the construction sector, and 8% believe it is quite likely they will want to be working in the construction sector. Only 6% think on any level that they will not want to be working in the construction sector in 5 years' time which is less than in 2015 and 2012 (10% in each case).

Overall, 6% of all construction workers felt it was unlikely that they would still want to work in the construction sector in five years' time. These workers were asked the reasons why. They were most likely to cite the fact that work outside of construction might be less physical (78%, 7 respondents²), while more than two-fifths thought they will find more suitable hours/conditions (44%, 4 respondents) and more a fifth thought they might find more interesting work (22%, 2 respondents) outside of construction. One respondent cited the belief that it would be easier to find work/more job security in other sectors.

² These are unweighted cases



The Northern Ireland construction workforce 2018-19 summary

Across the wide range of issues covered within the 2018/19 survey there are indications of more flexible, adaptive working patterns across the UK Construction workforce. This is reflected to some extent among the Northern Ireland workforce.

Within Northern Ireland there has been an increase in the proportion of workers that are self-employed, from 33% in 2015 to 46% in 2018/19 and a corresponding decrease in the proportion that are employed directly by companies (from 64% in 2015 to 52% in 2018/19). However, fewer workers in Northern Ireland are employed on a temporary basis in 2018/19 than in 2015 (10%, compared to 32%).

Workers in Northern Ireland, on average, work shorter hours than the UK average; 9% work more than 50 hours a week, compared with a UK average of 23%.

The workforce in Northern Ireland is more established than the UK average, with a higher proportion having worked in construction for more than 20 years (37%, compared to a UK average of 32%) and they are more likely to have worked in construction continuously throughout their careers (79%, compared to a UK average of 56%).

However, workers in Northern Ireland were less likely to hold supervisory or managerial positions at the time of interview (21%, compared with a UK average of 30%) and more likely than the UK average to have come into construction from skilled trades occupations (40% of those that have worked in other sectors cf. 27%³) and from the agricultural sector (40% cf. 9%). This may suggest a lower skilled workforce profile in Northern Ireland compared to the UK as a whole.

Compared with other regions/nations (with the exception of Scotland), construction workers in Northern Ireland the least likely to say they would like to change their trade or occupation (5% cf. 10% UK average). As well as being less likely than the UK average to be performing supervisory/management roles on site, they are also less likely to wish to take on such a role (65% of those that do not currently hold these positions do not want to, cf. 51% across the UK). Thus, there is more stability in Northern Ireland than across the UK with regard to skills and occupations within the workforce.

For construction workers in Northern Ireland, the distance travelled from home to work has decreased since 2015 from 30 miles to 18 miles. Workers in Northern Ireland are on a par with the UK average in terms of the mean distance travelled from their permanent home to work and slightly less likely than the UK average to have travelled more than 100 miles from their permanent home to work in the last 12 months (14%, compared with a UK average of 17%).

Northern Ireland construction workers are significantly more likely than the UK average to report that they work at their current site because they have always lived in that area (70% cf. 43%). They are more likely than the UK average to report being long term residents of the area in which they currently work and there is less recent mobility among Northern Ireland workers compared with the UK as a whole in this respect. This is further highlighted by the fact that

³ Based on a very small sample base



93% of Northern Ireland construction workers in 2018/19 were also based in Northern Ireland for their last job, 95% started their construction careers in Northern Ireland, and 93% of those with a qualification obtained it in Northern Ireland. Only construction workers in Scotland are more likely to have remained in the same region/nation for their qualification/training in construction.

There is some evidence of more uncertainty with regard to the duration of current projects within Northern Ireland than average across the UK; 23% do not know how long they expect to continue working at their current site, compared with a UK average of 16%.

However, compared with 2015, Northern Ireland workers were more likely to be confident that their next job will be at a location that will allow them to travel to work from their permanent home on a daily basis (86% cf. 68%).

Although there has been little change in the propensity for Northern Ireland construction workers to have worked in more than one trade than in 2015 (40% cf. 39% in 2015) they are less likely to have worked in just one project area (21% cf. 34%). This suggests the types of projects are changing but not so much the demand for different skills.

In terms of skills and qualifications, Northern Ireland construction workers are on a par with the UK average in terms of the extent to which they hold some form of skills card or certificate (97%). However, they are more likely than the UK average to hold a skills card or certificate and no other qualification (37% cf. 22%), although this proportion has declined since 2012 (67% then).

Northern Ireland construction workers are both less likely than the UK average to have held qualifications at the start of their construction careers (77% did not cf. 72%), and less likely than the UK average to hold any construction-specific qualification at the time of interviewing (55% cf. 72%). Furthermore, they are slightly less likely than the UK average to be working towards additional construction qualifications (12%, cf. 15%). Among Northern Ireland construction workers, apprenticeships are more common than across the UK (12% of those with qualifications, compared to a UK average of 6%). This may point to less of a focus on qualifications and a greater focus on vocational, job-specific certification within Northern Ireland than across the UK as a whole.



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