

Workforce Mobility and Skills in the UK Construction Sector 2022

Scotland Report - May 2023



Study prepared by BMG Research from a commission by CITB.

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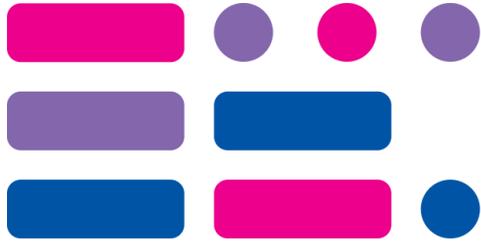
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Executive summary

CITB commissioned BMG Research to undertake the 2022 Construction Workforce Mobility Survey, which builds on previous surveys conducted in 2018/19, 2015, 2012, 2007, and 2005. Face-to-face interviews were conducted with 3,005 construction workers undertaking manual roles on sites across the UK and 233 interviews were conducted with construction workers in Scotland.

Profile of the sample

As in previous years of the survey, virtually all construction workers in manual roles interviewed in Scotland are male (99%), and this is to a greater extent than the UK average (97%). Just 1% are women.

Within Scotland, the age profile of construction workers has continued to become older than in previous years, and is significantly older than the UK average, and the wider UK workforce, as has been the case in previous years. Close to a quarter (23%) are aged 55 or over, compared to 16% in 2018/19 and 14% in 2015 and 2012, and compared to a UK average of 13%. A third (33%) are under 34, compared to 43% in 2018/19, 42% in 2015 and 39% in 2012, and compared to a UK average of 45%, and 36% of the wider UK workforce. Within this, the proportion of 16 to 24 year olds matches the UK average (19% compared to 18%).

While at 3%, the proportion of construction workers in Scotland of ethnic minority origin has increased slightly, this is a lower proportion than is the case among Scotland working age population (6%).

As was the case in 2018/19, the majority of construction workers in Scotland (94%, compared to 97% in 2018/19) originated from the UK, with similar proportions coming from EU (4%) and non-EU (2%) countries.

Nine in ten (89%) construction workers in Scotland hold a UK passport, higher than the UK average of 78%. One in twenty (5%) construction workers in Scotland hold a passport for another country, as compared to 13% across the UK as a whole, and a similar proportion (6%) do not have a passport.

Nine in ten (92%) Scotland's construction workers have lived in the UK all their lives, in line with 2018/19 (94%), and higher than the UK average of 80%.

Labourers/general operatives account for the highest proportion of construction workers in Scotland, (27%, compared to 27% in 2018/19 and 21% in 2015), higher than the UK average (18%), and the highest proportion of any nation/region. Carpenters account for close to one in five (17%) construction workers, again higher than the UK average (9%), and again the highest proportion of any nation/region.

Three quarters (73%) of construction workers in Scotland are directly employed, in line with 2018/19 (75%) and 2015 (70%), and significantly higher than the UK average of 48%. A quarter (24%) are self-employed, as compared to the UK average of 42%, and 4% are employed by an agency.

At 21%, the proportion of construction workers in Scotland who are employed on a temporary basis is the lowest of any nation/region.

While across the UK, workers are most likely to report that they work between 40 and 49 hours per week (59%), in Scotland this reduces to 35%. By contrast, workers in Scotland are more likely than average both to report working fewer hours than this (39% work between 30 and 39 hours as compared to a UK average of 16%), and to report working 50 or more hours (25% compared to 19%), and the latter represents a significant uplift on 2018/19 (8%). Consequently, in contrast to 2018/19 where Scotland had the lowest proportion of workers who worked for 50 or more hours, it now has the second highest proportion, after London.

Work histories

The Scottish profile in terms of length of time in the sector is very much in line with the UK. A third (34%) of all construction workers in Scotland have worked in the industry for over twenty years, in line with 2018/19 (32%). One in ten (7%) have been in the industry for less than a year, 15% between two and five years, and a third (36%) for between five and twenty years.

The proportion of construction workers in Scotland who have worked pretty much continuously in the industry has continued to increase, from 57% in 2015, to 70% in 2018/19, and to 76% in the latest survey. This is significantly higher than the UK average of 61%. Consequently, the proportion who have only ever worked in construction is also higher than the UK average (87% compared to 71%).

Overall, 16% of construction workers in Scotland have worked in more than one construction trade or occupation whilst working in the construction industry. While this is up on the 10% who had done so in 2018/19, it is lower than was the case in 2015 (26%), and significantly lower than the UK average of 35%.

Amongst the 16% of all construction workers in Scotland that had worked in at least one other role/occupation, 29% had worked in 1 previous role, 58% had worked in 2 previous roles, 8% had worked in 3 roles/occupations and 5% had worked in 4 roles/occupations. Workers are most likely to have previously worked as a labourer/general operative (45%), or a carpenter/joiner (21%), in line with the UK average, with other trades mentioned by fewer than one in ten.

Three quarters (74%) of construction workers in Scotland would like to carry on in the same trade or occupation, somewhat lower than 2018/19 (83%), and the UK average of 80%. One in ten (8%) would like to change their trade/occupation, largely in line with 2018/19 (5%)

and the UK average (7%). The remainder would like to leave construction (4%) or are unsure (14%).

Qualifications and skills

Skills cards/certificates

While over nine in ten (91%) of all construction workers in Scotland report holding a skill card or certificate (e.g. CSCS or CSR), this is a reduction on the 99% who did so in 2018/19. While this reflects the UK picture, which has seen a similar decline (from 97% to 93%), the decrease in Scotland is among the most marked. Correspondingly, the proportion who have no cards has risen from 1% in 2018/19, to 9% in the latest survey.

In terms of the type of skill card or certificate held by construction workers in Scotland, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (81%), but to a lesser extent than 2018/19 (92%). One in twenty hold the CSR and the CPCS (both 6%).

Workers who hold a CSCS card were asked what colour their cards are. Overall 7% of CSCS card holders have Red cards, three in ten (31%) have Green cards, and over a third (36%) have Blue cards. Fewer than one in ten hold cards of another colour.

Construction-specific qualifications

Over three quarters (77%) of workers in Scotland report having no construction-related qualifications when they started their first job. While this is largely in line with 2018/19 (83%) it is significantly higher than the UK average of 47%, which has decreased significantly since 2018/19 from 72%. This suggests that Scotland has not made the gains in this respect that have been seen across the England and Wales.

Overall, seven in ten (70%) construction workers in Scotland report holding a construction-related qualification, largely in line with the 75% who did so in 2018/19, and the UK average of 69%.

While as in previous years, the qualifications most likely to be held by construction workers in Scotland are NVQ/SVQ qualifications (52%), with workers much less likely to hold City and Guilds (8%), HNC/HND/BTEC Highers (7%), an apprenticeship qualification (7%) or a degree (5%).

Current study for additional construction qualifications

Overall, one in ten (10%) construction workers in Scotland are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications), in line with 2018/19 (11%) but lower than the UK average (13%).

Supervisory and managerial qualifications and training

Amongst those who do not currently perform supervisory/management roles and have not had this role before, fewer than one in ten (7%) would like to do so, significantly below the

UK average (17%), and the lowest of any region/nation. Over two thirds (69%) do not wish to take on supervisory roles, up on 54% in 2018/19, and among the highest of any region/nation, matched only by the North East. So as well as being less likely to occupy supervisory roles, workers in Scotland are less likely to wish to do so in future than is the case across the UK.

Among those who have or have had some form of supervisory or management responsibilities, nine in ten (89%) have received formal training, somewhat above 2018/19 (84%), and above the UK average (80%).

The proportion that has undertaken any managerial or supervisory training increases with age, to 33% of those aged 45 or over. Likewise it increases with length of time in the industry, to 28% of those in construction for five or more years.

In terms of the types of supervisory/managerial training undertaken, SMSTS is most frequently mentioned by those who have undertaken any training (57%), followed by in-house training (51%), and Site Safety Supervisors Courses (17%). These were also the top three most mentioned types of supervisory training in 2018/19 and 2015.

Basic skills needs

While there has been an increase in the proportion of construction workers who identify a need for any training, from 2% in 2018/19, to 6% in the latest survey, this places Scottish construction workers among the least likely to need any training, matched only by the North East.

A quarter (23%) of all construction workers in Scotland have received formal training designed to improve managerial or supervisory knowledge or skills, up on the 16% who had done so in 2018/19, but lower than the UK average of 33%.

Overall skill levels

As in previous years, the vast majority (95%) of construction workers in Scotland have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview). While this is in line with the UK average (96%), it is lower than the 100% who did so in 2018/19. This decrease is largely a result of a reduction in the proportion holding a skills card/certificate (from 99% to 91%).

Overall, two in three (65%) construction workers in Scotland have qualifications equivalent to Level 2 or above, somewhat higher than 2018/19 (57%), and the UK average of 61%, and a third (33%) have level 3 or above, in line with 2018/19 (31%) and the UK average (32%).

Geographic mobility

Work history in the region/nation

All workers were asked what made them decide to work in the region/nation that they are currently working in. At 47%, the proportion who grew up in Scotland is in line with 2018/19

(45%) and the UYK average of 46%. A similar proportion (46%) say their employer sent them there, down on 2018/19 (58%), but in line with the UK average (47%).

Three quarters (76%) of construction workers in Scotland have worked within their current region for their whole career, in line with 2018/19 (76%), but significantly higher than the UK average (49%). A further one in five (20%) have worked in their current region for most of their career, meaning that all but 3% of construction workers in Scotland have worked in Scotland for all or most of their career.

Construction workers in Scotland are the most likely of the nations/regions to report that their last site was also in Scotland (98%, as in 2018/19).

Worker origins

The vast majority (94%) of construction workers in Scotland were living in Scotland when they started their construction career, as has been the case previously (96% in 2018/19), and again this is highest of any nation/region.

Travel to site

All construction workers in Scotland were interviewed on a site that was located within the same region/nation as their permanent home, as was the case in 2018/19. Only in Northern Ireland is this also the case.

A third (32%) of construction workers in Scotland have worked no further than 20 miles away from their home, in line with 2018/19 (30%) and the UK average of 33%). A further three in ten (31%) have worked between 21 and 50 miles away, up on 2018/19 (21%) but in line with the UK average of 34%. This leaves one in three (36%) who have worked more than 50 miles away, including 14% who have worked over 100 miles away, a significant decline on the 28% who had done so in 2018/19. Consequently the average furthest distance travelled by construction workers in Scotland is 49 miles, in line with the UK average of 46 miles.

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 12 miles, down on 2018/19 (18 miles) and 2015 (16 miles), and a somewhat shorter distance than the UK average of 16 miles. This downward trend is also reflected in the national picture, where the average distance of 16 miles is down on 18 miles in 2018/19, 22 miles in 2015 and 28 miles in 2012.

Close to half (45%) of those providing a response travel less than 10 miles to work, up on 2018/19 (38%), three in ten (30%) travel between 10 and 19 miles (compared to 22% in 2018/19), and 25% travel further than this (compared to 32% in 2018/19).

Use of temporary accommodation

One in twenty (6%) construction workers in Scotland report that they are currently staying in temporary accommodation while working at their site, in line with previous years (2% in 2018/19 and 7% in 2015), and with the UK average.

Site duration and change

All the workers in Scotland who are currently employed on a temporary basis (21% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 2% who expect to work for the rest of the week, 2% expecting another one to four weeks, 20% for one to six months, a third (36%, significantly higher than the UK average of 20%) for six to twelve months, and nearly one in ten (8%) for more than a year. A third (32%) do not know how much longer they expect to be working, somewhat lower than 2018/19 (41%), but in line with the UK average (32%).

Overall, around one in twenty (6%) of all construction workers in Scotland do not expect to work on that site for more than a month, lower than 2018/19 (14%) and the UK average (12%). Just 1% believe they will be there for less than a week. While a higher proportion of workers in Scotland expect to be on site for between six and twelve months than the UK average (33% compared to 25%), the reverse is true in relation to being on site for more than a year (4% compared to 13%). Three in ten (30%) are unsure in this respect, down on the 39% who were unsure in 2018/19, but remaining higher than the UK average of 22%.

A majority (77%) of all construction workers in Scotland 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, in line with 2018/19 (80%) and higher than the UK average (69%). The proportion who are sure that this will not be the case has remained stable (4% compared to 3% in 2018/19), as has the proportion who say it depends where the work is has increased (11% in both instances). The remaining 7% do not know.

Sub-sector and sector mobility

Sub-sector mobility

New housing remains the most common types of work undertaken in Scotland (89%), as was the case in 2018/19 (89%) and 2015 (86%), followed by housing repair and maintenance (61%), which has seen a significant increase since 2018/19 (48%), such that it is significantly higher than the UK average of 42%.

By contrast, commercial, private industrial and public non-housing work have declined, from 46% to 33% for commercial work, from 40% to 27% for private industrial work, and from 43% to 21% for public non-housing work. The latter two now sit below the UK average (35% and 32% respectively).

Infrastructure building projects have remained stable, with 27% having spent time on these, as compared to 26% in 2018/19 and UK average of 23%.

At 27%, the proportion of construction workers in Scotland who have worked on only one type of project is lower than the UK average of 42%.

Leaving the sector

Over four in five (86%) construction workers in Scotland think it is likely that they will still want to do so, including 49% who say they definitely will be, and 30% who think it is very likely. This is in line with the UK average of 82%.

One in twenty (4%) say it is unlikely that they will still want to work in construction in five years' time (compared with a UK average of 7%).

Introduction

Aims and objectives

Following on from previous surveys conducted for CITB in 2018/19, 2015, 2012, 2007 and 2005, BMG Research was commissioned to undertake a UK-wide survey of the mobility and skills of UK construction workers in 2022.

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 their occupational and geographic mobility. This work enhances the evidence-base for skills planning, particularly in respect of profiling the existing workforce and identifying where skills gaps might emerge as a result of occupational and geographic movement. The findings will assist the industry, government, training providers and others with responsibility for industry skills development to direct their work with greater accuracy and effect.

The specific objectives of this research project are 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 within the UK 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 UK-origin workforce and of that part of the workforce with overseas origins.
- Examine the scale and extent of occupational mobility within the construction workforce to see how workers in construction occupations change their occupations over time, both within construction and in relation to other sectors, and, related to this, the extent to which managers and supervisors have received training specifically to enhance their managerial skills.

The focus of the survey is on site-based physical delivery of construction projects and, therefore, excludes associated clerical and sales occupations and professionals such as architects, surveyors and office-based managers.

This report discusses the findings within Scotland.

Method

The 2022 Construction Workforce Mobility Survey followed a similar methodology to that used in the last wave of this research in 2018/19. Overall, 3,005 interviews with construction workers in site-based roles across the UK were required, split between the 12 standard regions/nations. In total, 233 interviews were conducted in Scotland.

Sampling

This sub-section provides an overview of the sampling methodology employed for the 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 previous editions of the survey.

Also as in previous surveys, the commercially produced 'Glenigan' database of construction projects was used as the sampling frame.

Project eligibility criteria were:

- value: £250,000+
- contract 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 English region and in each of 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, or lower than expected numbers of on-site workers being available. In some regions, more than 30 sites were recruited to compensate.

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 who were mainly in manual trades/roles. A recruitment questionnaire (reproduced in the technical report) was used to check the 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. They were undertaken between May and December 2022

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 200 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 per region/nation as reported in the government's Annual Population Survey of economically active adults aged 16 and over.

Figure 1: Number of interviews in the weighted sample by region/nation

	Interviews	Weighted percentage
North East	206	3.3
North West	271	11.2
Yorkshire and the Humber	200	8.1
East Midlands	232	7.1
West Midlands	306	7.0
East of England	202	11.2
Scotland	443	13.6
South East	283	15.5
South West	201	8.9
Scotland	233	8.2
Wales	202	4.0
Northern Ireland	226	2.5
UK	3,005	100.0

*Source Annual Population Survey via Nomis: Economically Active adults aged 16+, Oct 2021-Sep 2022; note that total percentage does not add exactly to 100 because of rounding

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

Methodological points to note

In discussing findings from this 2022 survey of mobility and skills in the UK's construction industry workforce, a number of methodological points are relevant, as follows.

Sampling variation (for example, random differences in the composition of the samples in different editions of the survey or in the different regional sub-samples within this year's survey) may induce apparent differences or exaggerate actual differences in survey findings over time or between regions which owe more to these sampling effects than to real world change. This effect is particularly likely when considering smaller sub-sets of data where such effects have the potential to have a proportionately greater impact. The point is not that differences in findings for different groups or over time are necessarily unreal but that a degree of care needs to be applied in interpreting the findings such that their consistency with other related data and with extraneous knowledge of the environment in which the survey took place is taken into account.

Further, on this question of interpretation, it is evident that a broad survey, as here, of large numbers of respondents using a structured questionnaire, produces statements of fact (as far as best survey practice can estimate 'fact') but does not necessarily explain the reason for a particular statistic or its change over time.

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 2022 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 because of their limited sub-sample sizes. Unweighted bases are shown throughout for guidance on this point.

Profile of construction site workers

This first section of the report provides a profile of construction site workers interviewed in the survey and where possible makes comparisons with previous years' surveys. 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; and *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 to 5 detail the demographic profile (gender, age, ethnicity, nationality and disability) of the 2022 sample of construction workers, compared with the 2018/19 and 2015 surveys and official statistics from the Annual Population Survey (where comparisons are possible).

Gender

As in previous years of the survey, virtually all construction workers in manual roles interviewed in Scotland are male (99%), and this is to a greater extent than the UK average (97%). Just 1% are women. Male dominance is greater in the survey sample than in the UK 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 in maintenance and repair (an industry segment in which women, for example in some small all-female businesses, may be slightly more frequent). More detail is shown in the following figure.

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

Base: All respondents

	Scotland 2022 %	UK 2022 %	UK Workforce* %
Male	99	97	52
Female	1	2	48
Transgender	0	<0.5	-
Non-binary	0	<0.5	-
Prefer not to say	0	<0.5	-
<i>Unweighted bases</i>	233	3,005	33,808,600

Q43 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2021-Sep 2022

Age

Within Scotland, the age profile of construction workers has continued to become older than in previous years, and is significantly older than the UK average, and the wider UK workforce, as has been the case in previous years.

Close to a quarter (23%) are aged 55 or over, compared to 16% in 2018/19 and 14% in 2015 and 2012, and compared to a UK average of 13%. A third (33%) are under 34, compared to 43% in 2018/19, 42% in 2015 and 39% in 2012, and compared to a UK average of 45%, and 36% of the wider UK workforce. Within this, the proportion of 16 to 24 year olds matches the UK average (19% compared to 18%).

One in ten (9%) are aged 60 or over, higher than the UK average of 6%.

Figure 3: Age profile of the sample compared with 2018/19, 2015 and 2012 and the Annual Population Survey

Base: All respondents

	Scotland 2022 %	Scotland 2018/9 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %		UK Workforce* %
16 to 19 years	7	5	6	2	6	16 to 19 years	4
20 to 24 years	12	14	14	10	13	20 to 24 years	9
25 to 34 years	14	24	22	27	26	25 to 34 years	23
35 to 44 years	23	20	21	24	24	35 to 49 years	33
45 to 54 years	20	20	20	22	17	50 to 64 years	28
55 to 59 years	14	10	7	14	8		
60+ years	9	6	7			6	65+ years
<i>Unweighted bases</i>	233	404	463	409	3,005		33,808,600

Q44 *Source Annual Population Survey via Nomis: Economically Active adults aged 16+ Oct 2021-Sep 2022

Ethnicity

In terms of ethnicity, the great majority of construction workers in Scotland continue to be of White origin (97%). Less than one in twenty (3%) are of Black, Asian or Mixed origin, significantly lower than the UK working age population (12%).

Figure 4: Ethnic profile of the sample compared with previous surveys and the UK population

Base: All respondents

	Scotland 2022 %	Scotland 2018/9 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %	UK population aged 16 to 64*
White	97	99	98	98	91	84
Black	<0.5	0	<0.5	0	2	4
Asian	0	0	0	1	2	6
Mixed	1	0	0	0	1	2
Other/Not stated	1	1	1	1	3	4
<i>Unweighted bases</i>	<i>443</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>3,005</i>	<i>41,439,500</i>

Q49 *Source Annual population Survey via Nomis: UK population aged 16-64 Oct 2021-Sep 2022

Figure 5 summarises the proportion of construction workers of non-white (ethnic minority) origin overall and within each region/nation and compares the profile with construction workers from the 2018/19, 2015 and 2012 surveys and with the population (aged 16-64) of each region/nation as a whole.

While at 3%, the proportion of construction workers in Scotland of ethnic minority origin has increased slightly, this is a lower proportion than is the case among Scotland working age population (6%).

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

Base: All respondents

	UK 2022 %	UK 2018/9 %	UK 2015 %	UK 2012 %	Non-white (ethnic minority) population aged 16-64* %
UK	7	6	4	4	14
East Midlands	3	2	2	2	14
East of England	5	5	3	4	12
London	19	15	15	12	41
North East	2	<0.5	<0.5	<0.5	6
North West	1	3	1	2	13
South East	11	10	8	3	12
South West	3	5	2	1	6
West Midlands	7	7	5	9	22
Yorkshire and the Humber	5	5	2	1	12
Wales	3	2	2	<0.5	5
Scotland	3	1	2	1	6
Northern Ireland	1	1	1	<0.5	4
<i>Unweighted bases</i>	<i>3,005</i>	<i>4,048</i>	<i>4,771</i>	<i>4,933</i>	<i>41,439,500</i>

Q49 *Source Annual population Survey via Nomis: UK Population aged 16-64 by ethnicity Oct 2021-Sep 2022

Country of origin

For the first time in 2018/19, construction workers were asked for details about their nationality and country of origin. The table below focuses on the non-UK nationalities that are most frequent in the 2022 survey.

As was the case in 2018/19, the majority of construction workers in Scotland (94%, compared to 97% in 2018/19) originated from the UK, with similar proportions coming from EU (4%) and non-EU (2%) countries.

Figure 6: Country of origin of non-UK national construction workers in the UK by region/nation as a percentage of the total workforce

Base: All respondents

Row percentages	Unweighted bases	EU %	Non-EU %	Albania %	Romania %	Lithuania %
UK	3,005	9	8	1	5	1
East Midlands	232	5	8	1	2	1
East of England	202	16	6	1	8	5
London	443	30	29	5	19	2
North East	206	2	1	0	<0.5	0
North West	271	2	2	0	1	0
South East	283	11	7	1	6	1
South West	201	2	2	<0.5	1	0
West Midlands	306	2	6	0	<0.5	<0.5
Yorkshire and the Humber	200	98	3	0	1	1
Wales	202	3	3	0	1	0
Scotland	233	4	2	<0.5	0	0
Northern Ireland	226	4	2	0	0	0

Q45 Note: Romania and Lithuania are included in the EU proportion. Albania is included in the non-EU proportion. In neither case, therefore, are these individual country proportions *additional* to the respective EU/non-EU proportions

By contract type, those employed directly are more likely than average to have been born in the UK (98%), and those who are self-employed are more likely to have been born in EU countries (13%). Those employed on a temporary basis are more likely than average to have been born in EU (12%) and non-EU (6%) countries.

Holding of passports

Nine in ten (89%) construction workers in Scotland hold a UK passport, higher than the UK average of 78%.

One in twenty (5%) construction workers in Scotland hold a passport for another country, as compared to 13% across the UK as a whole, and a similar proportion (6%) do not have a passport.

Length of time living in the UK

Nine in ten (92%) Scotland's construction workers have lived in the UK all their lives, in line with 2018/19 (94%), and higher than the UK average of 80%.

Figure 7: Length of time that construction workers have lived in the UK by region/nation

Base: All respondents

Row percentages	Unweighted bases	All their lives %	Up to 5 years %	More than 5 years %
UK	3,005	80	5	14
East Midlands	232	83	3	13
East of England	202	74	2	22
London	443	39	16	39
North East	206	96	<0.5	4
North West	271	93	<0.5	6
South East	283	77	7	16
South West	201	87	1	8
West Midlands	306	91	1	7
Yorkshire and the Humber	200	91	0	9
Wales	202	90	2	6
Scotland	233	92	5	3
Northern Ireland	226	92	2	5

Q39

Disability

Amongst all construction workers in Scotland, 1% cent report that they have a long-term illness, health problem, or disability which limits the type of work they can do (as compared to 2% in 2018/19), in line with the UK average of 3%.

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 8 summarises all the trades/occupations mentioned by at least 1% of the sample and compares this with the occupational profile from the 2018/19 and 2015 surveys.

Labourers/general operatives account for the highest proportion of construction workers in Scotland, (27%, compared to 27% in 2018/19 and 21% in 2015), higher than the UK average (18%), and the highest proportion of any nation/region.

Carpenters account for close to one in five (17%) construction workers, again higher than the UK average (9%), and again the highest proportion of any nation/region.

Plant/machine operatives, bricklayers and steel erectors each account for around one in ten construction workers (10%, 9% and 8% respectively). These are largely in line with the UK average with the exception of steel erectors, which is higher than the UK average of 2%. Other occupations account for less than one in ten of those interviewed in Scotland.

Figure 8: Occupational profile

Base: All respondents. Mentions 1%+

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	UK 2022 %
Labourer/General operative	27	27	21	18
Carpenter/joiner	17	14	24	9
Plant/machine operative	10	4	5	9
Bricklayer	9	14	11	10
Steel erector/rigger	8	2	0	2
Site manager	6	4	7	9
Electrician	4	4	3	5
Plumber	4	6	8	3
Scaffolder	3	7	2	3
Technical	2	2	0	3
Banksman/Banksperson	1	<0.5	2	2
Supervisor/foreman	1	1	1	2
Pipe fitter	1	2	0	1
Painter/decorator	1	5	5	1
<i>Unweighted bases</i>	233	463	409	3,005

Q5

Supervisory roles

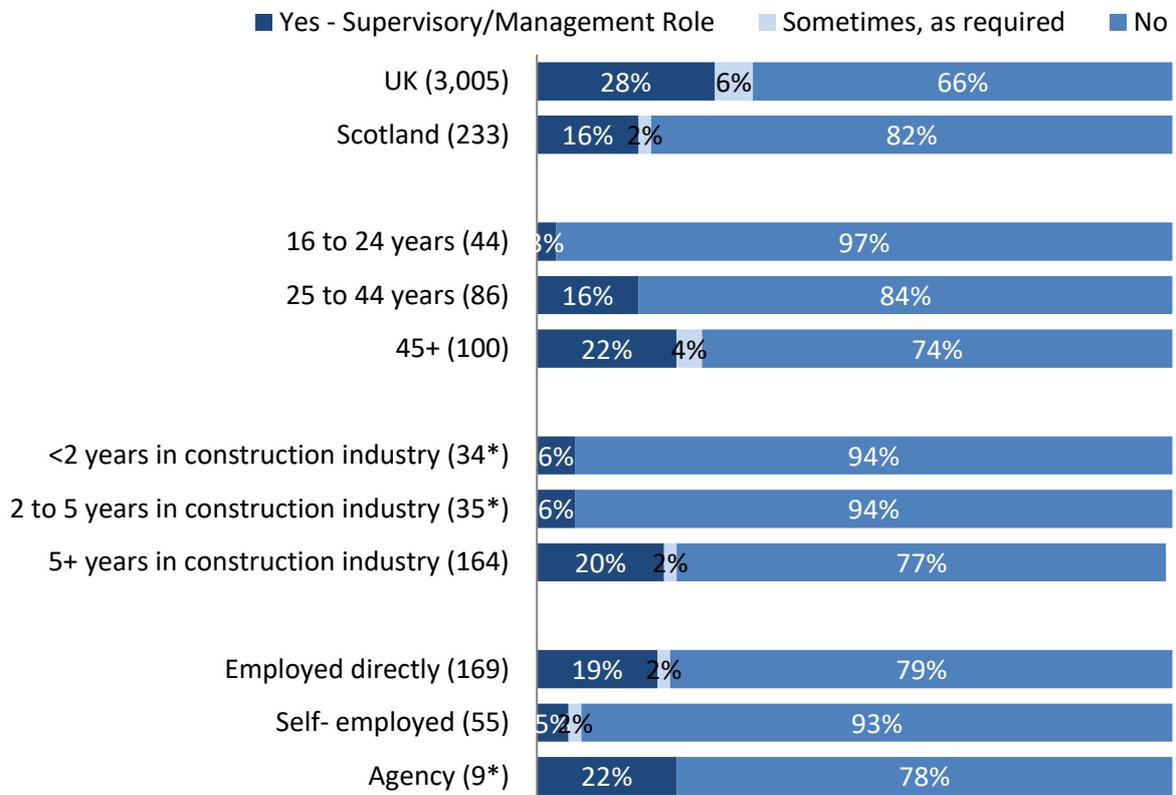
Around one in six (16%) construction workers in Scotland say they perform a supervisory or management role on their site, largely in line with 2018/19 (15%), and remaining significantly lower than the UK average of 28%.

As was the case previously, the incidence of workers in a supervisory role increases with age, to 22% of those aged 45+, and with time in the industry, to 20% of those with more than five years' experience.

As would be expected, workers who are directly employed by a company continue to be significantly more likely than those who are self-employed to perform a supervisory role (19% compared to 5%).

Figure 9: Whether respondents perform a supervisory or management role

Base: All respondents



Q8. Unweighted bases in parentheses

* Caution: low base

Employment status

Three quarters (73%) of construction workers in Scotland are directly employed, in line with 2018/19 (75%) and 2015 (70%), and significantly higher than the UK average of 48%.

A quarter (24%) are self-employed, as compared to the UK average of 42%, and 4% are employed by an agency.

The proportion of workers who are self-employed is higher than average among those who have two to five years' experience (43%).

Figure 10: Employment status

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	UK 2022 %	Years working in construction %		
					<2	2-5	5+
Employed directly by a company (contractor or sub- contractor)	73	75	70	48	76	57	75
Self-employed	24	24	25	42	18	43	21
Working for an employment agency	4	1	5	9	6	0	4
Working on some other basis	0	0	<0.5	1	0	0	0
<i>Unweighted bases</i>	<i>233</i>	<i>404</i>	<i>463</i>	<i>3,005</i>	<i>34*</i>	<i>35*</i>	<i>164</i>

Q20

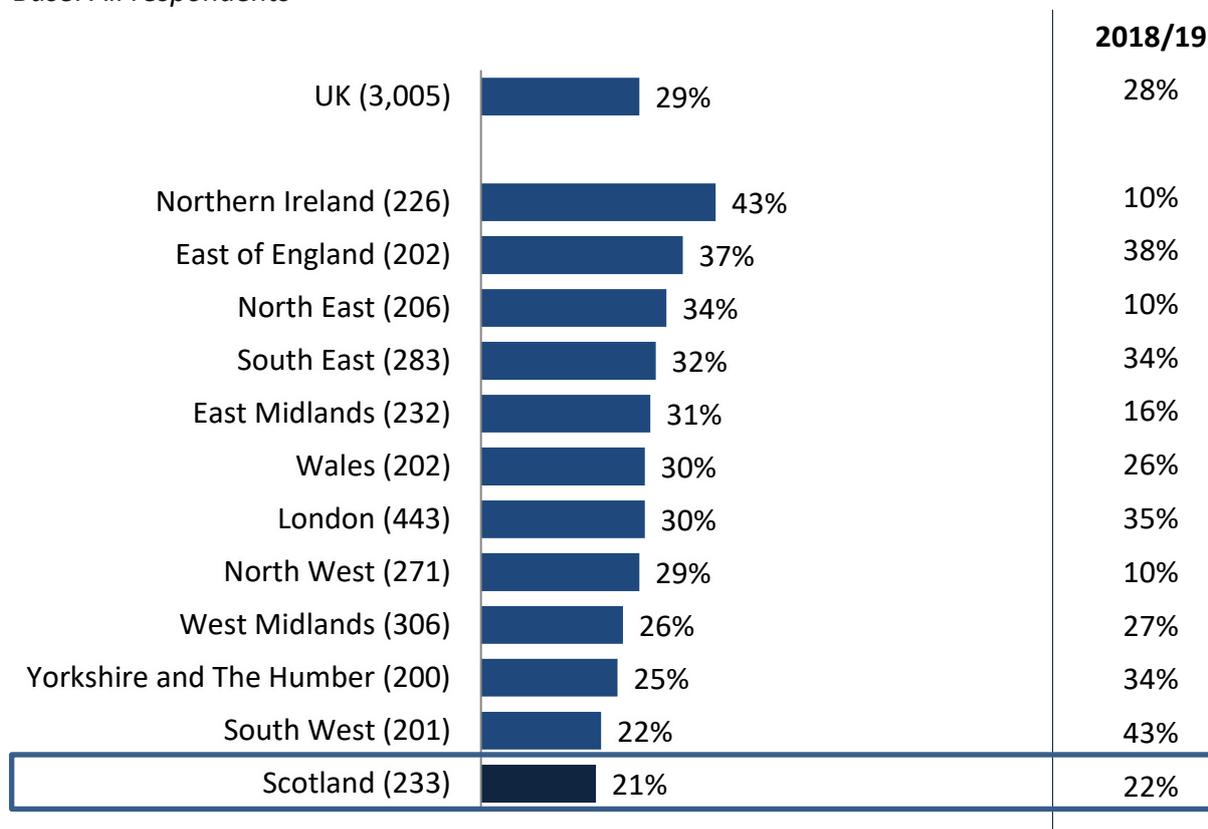
* Caution: low base

Employment contract basis

At 21%, the proportion of construction workers in Scotland who are employed on a temporary basis is the lowest of any nation/region.

Figure 11: Proportion of workers employed on a temporary basis, by region/nation (including fixed-term contracts)

Base: All respondents



Q21. Unweighted bases in parentheses

Hours worked

In terms of hours worked, construction workers in Scotland differ significantly from the UK average, as was the case in 2018/19.

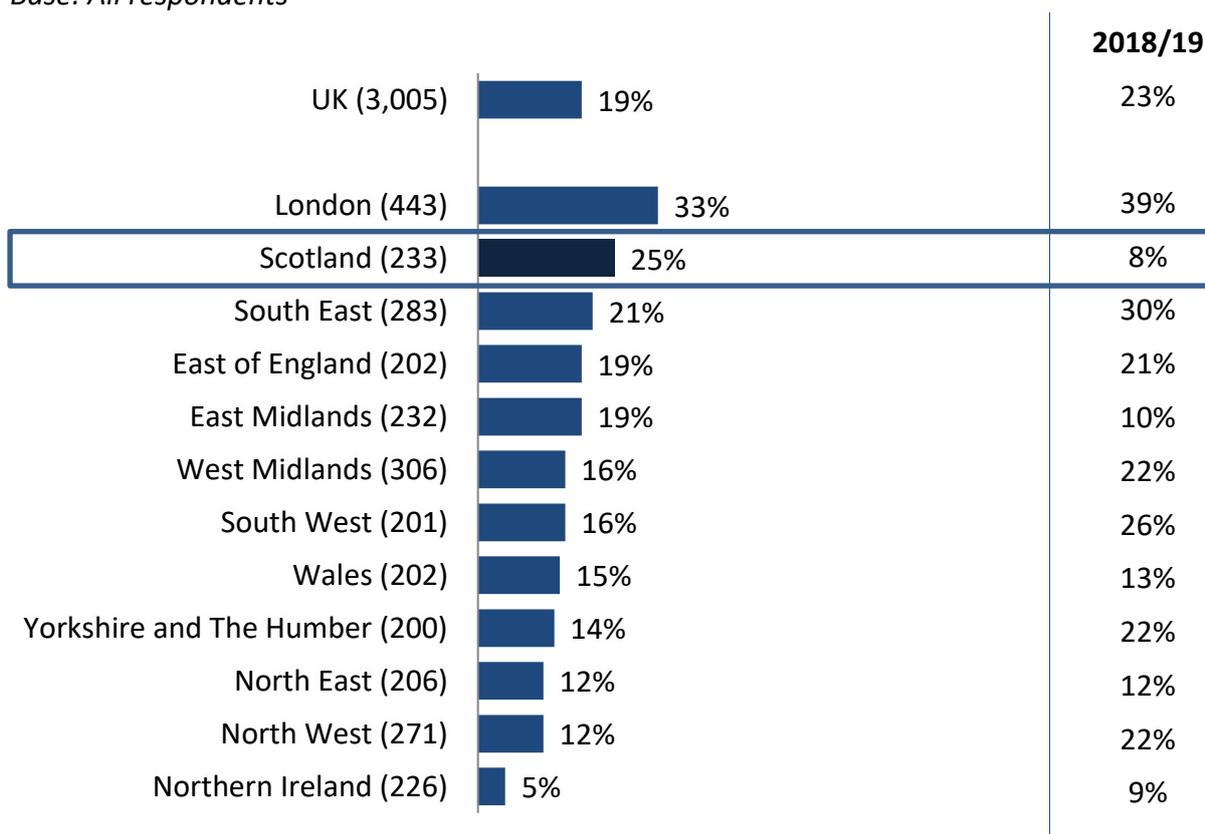
While across the UK, workers are most likely to report that they work between 40 and 49 hours per week (59%), in Scotland this reduces to 35%.

By contrast, workers in Scotland are more likely than average both to report working fewer hours than this (39% work between 30 and 39 hours as compared to a UK average of 16%), and to report working 50 or more hours (25% compared to 19%), and the latter represents a significant uplift on 2018/19 (8%). Consequently, in contrast to 2018/19, where Scotland had the lowest proportion of workers who worked for 50 or more hours, it now has the second highest proportion, after London.

Self-employed construction workers in Scotland are more likely than average to work 50 or more hours per week (42%) as are those in temporary positions (44%).

Figure 12: Proportion of workers that typically work 50 or more hours per week, by region/nation

Base: All respondents



Q22. Unweighted bases in parentheses

Work histories

Time in the sector

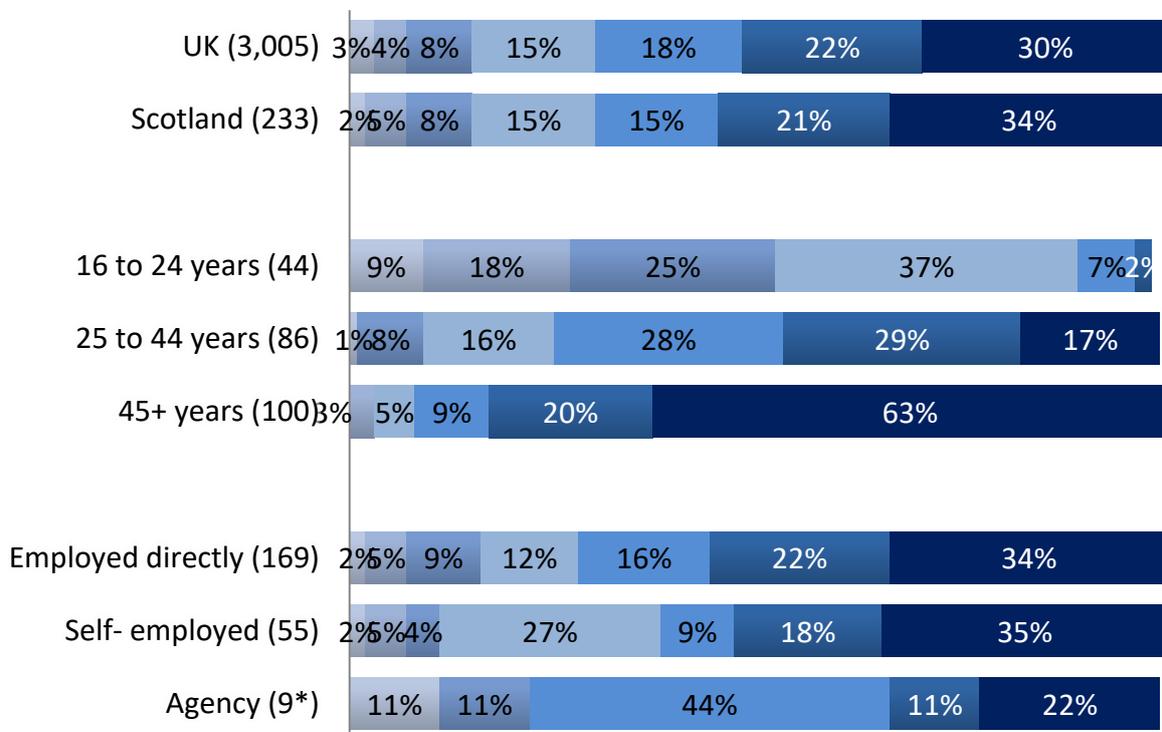
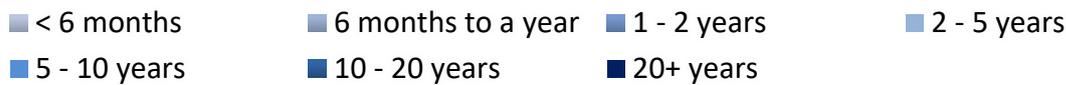
The Scottish profile in terms of length of time in the sector is very much in line with the UK.

A third (34%) of all construction workers in Scotland have worked in the industry for over twenty years, in line with 2018/19 (32%).

One in ten (7%) have been in the industry for less than a year, a quarter (23%) between two and five years, and a third (36%) for between five and twenty years.

Figure 13: Years spent working in the construction sector

Base: All respondents



Q1. Unweighted bases in parentheses

* Caution: low base

Compared with previous years, Figure 14 shows a largely consistent picture in terms of length of time in the sector.

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

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	UK 2022 %
Less than 6 months	2	3	3	3
Up to a year	7	7	6	7
Up to 2 years	15	12	10	14
Up to 5 years	30	26	22	29
Up to 10 years	45	44	40	48
Up to 20 years	67	68	63	70
More than 20 years	34	32	37	30
<i>Unweighted bases</i>	<i>233</i>	<i>404</i>	<i>463</i>	<i>3,005</i>

Q1

Pre-construction employment histories

The proportion of construction workers in Scotland who have worked pretty much continuously in the industry has continued to increase, from 57% in 2015, to 70% in 2018/19, and to 76% in the latest survey. This is significantly higher than the UK average of 61%.

Consequently, the proportion who have only ever worked in construction is also higher than the UK average (87% compared to 71%).

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

All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	UK 2022 %	Age %		
					16 - 24	25 - 44	45+
I've worked in construction pretty much continuously (and not in any other industry)	76	70	57	61	75	69	83
I have only worked in construction jobs but have had spells of being out of work	9	11	5	6	7	15	6
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	6	3	6	8	9	7	3
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	8	14	18	4	8	4
This is my first job. I haven't worked in any other industry.	1	6	12	4	5	0	1
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	2	3	4	4	0	1	3
<i>Unweighted bases</i>	<i>233</i>	<i>375</i>	<i>452</i>	<i>3,005</i>	<i>44</i>	<i>86</i>	<i>100</i>

Q2

* Caution: low base

Overall, just 6% (equating to 17 workers on an unweighted basis) of construction workers in Scotland 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.

Of this group, 6 had worked in wholesale and retail trade, and 4 had worked in mining and quarrying. Other industries were mentioned by two or fewer workers.

In terms of the job roles that respondents had held in other sectors, 7 had been process, plant and machine operatives, 6 had been in skilled trades occupations, with other roles mentioned by two or fewer workers.

Occupational switching and progression within construction

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

Overall, 16% of construction workers in Scotland have worked in more than one construction trade or occupation whilst working in the construction industry. While this is up on the 10% who had done so in 2018/19, it is lower than was the case in 2015 (26%), and significantly lower than the UK average of 35%.

Temporary workers are significantly more likely than average to have worked in more than one construction trade or occupation (34%).

Construction workers 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 had previously worked in, with each worker able to list all previous occupations.

Amongst the 16% of all construction workers in Scotland that had worked in at least one other role/occupation, 29% had worked in 1 previous role, 58% had worked in 2 previous roles, 8% had worked in 3 roles/occupations and 5% had worked in 4 roles/occupations. Workers are most likely to have previously worked as a labourer/general operative (45%), or a carpenter/joiner (21%), in line with the UK average, with other trades mentioned by fewer than one in ten.

Figure 16: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	Scotland 2022 %	UK 2022 %
Labourer/General operative	45	39
Carpenter/joiner	21	15
Plant/machine operative (e.g. Fork lift/JCB)	8	10
Plasterer	5	5
Scaffolder	5	2
Bricklayer	3	12
Painter/decorator	3	4
Site manager	3	4
Banksman/Banksperson	3	7
Electrician	3	2
Plumber	3	3
Floorer	3	4
Technical e.g. surveyor, maintenance technician	3	2
Welder	3	1
Steel erector/rigger	3	2
Other	5	10
<i>Unweighted base</i>	38	1,082

Q7

Future career plans

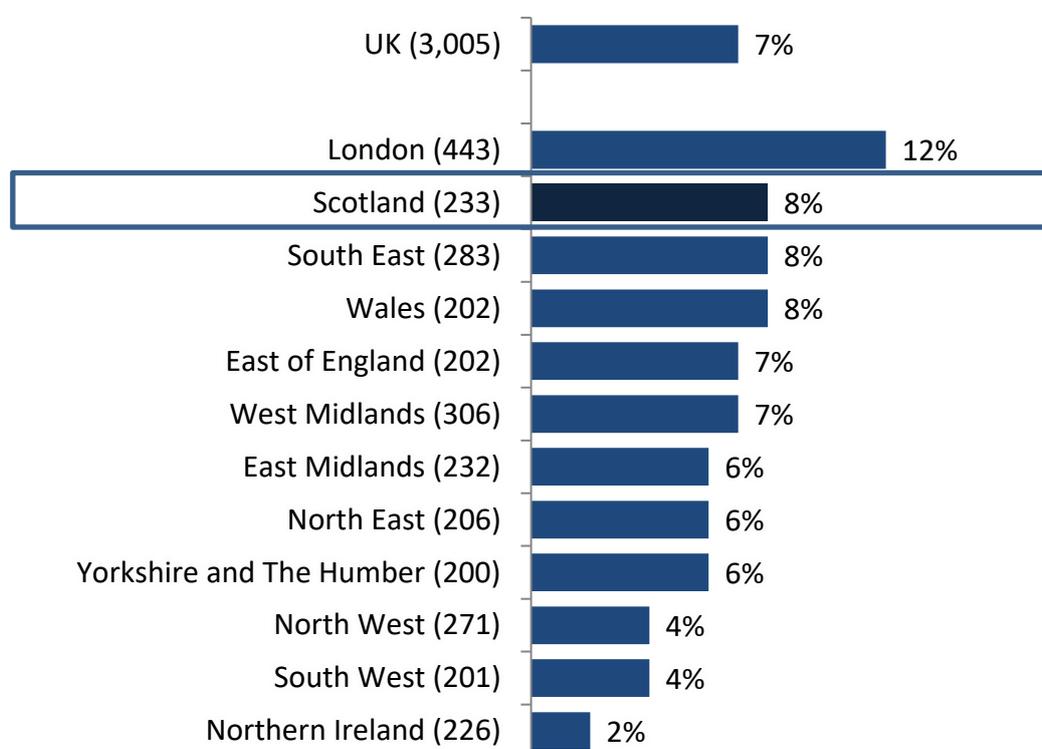
Three quarters (74%) of construction workers in Scotland would like to carry on in the same trade or occupation, somewhat lower than 2018/19 (83%), and the UK average of 80%.

One in ten (8%) would like to change their trade/occupation, largely in line with 2018/19 (5%) and the UK average (7%). The remainder would like to leave construction (4%) or are unsure (14%).

There are very few sub-group differences in this respect, with the exception that those with level 4 or higher qualifications are more likely than average to want to leave the industry (12%) and to change their trade (18%).

Figure 17: Proportion of construction workers who would like to change their trade or occupation within the construction sector, by region/nation

Base: All respondents



Q33. Unweighted bases in parentheses

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 being worked towards
- workers' self-perceived need for additional training in basic skills

Construction skill cards and certificates

While over nine in ten (91%) of all construction workers in Scotland report holding a skill card or certificate (e.g. CSCS or CSR), this is a reduction on the 99% who did so in 2018/19. While this reflects the UK picture, which has seen a similar decline (from 97% to 93%), the decrease in Scotland is among the most marked.

Correspondingly, the proportion who have no cards has risen from 1% in 2018/19, to 9% in the latest survey.

Figure 18: Proportion of workers who have a skill card/certificate, by region/nation

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %
Total (3,005)	93	97	96	97
South West (201)	97	97	96	97
Northern Ireland (226)	97	97	90	100
North East (206)	97	94	96	99
Wales (202)	95	92	92	92
Yorkshire and the Humber (200)	94	98	97	97
South East (283)	93	98	98	96
London (443)	92	98	98	96
West Midlands (306)	91	99	98	100
Scotland (233)	91	99	88	98
North West (271)	91	98	97	99
East of England (202)	91	97	96	98
East Midlands (232)	90	93	93	99
<i>Unweighted bases for 2022 in parentheses</i>				

Q12

In terms of the type of skill card or certificate held by construction workers in Scotland, the CSCS (Construction Skills Certification Scheme (GB) is the most commonly held (81%), but to a lesser extent than 2018/19 (92%). One in twenty hold the CSR and the CPCS (both 6%).

Figure 19: Type of skill card/certificate held

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %
CSCS (Construction Skills Certification Scheme) (GB)	81	92	84
CSR (Construction Skills Register) (NI)	6	3	1
CISRS (Construction Industry Scaffolders Record Scheme)	<0.5	3	3
CPCS (Construction Plant Competence Scheme)	6	2	7
Other	1	1	5
<i>Unweighted bases</i>	<i>233</i>	<i>404</i>	<i>463</i>

Q12

Workers who hold a CSCS card were asked what colour their cards are. Overall, 7% of CSCS card holders have Red cards, three in ten (31%) have Green cards, and over a third (36%) have Blue cards. Fewer than one in ten hold cards of another colour.

Figure 20: Colour of CSCS card held

Base: Where CSCS card is held

	Scotland 2022 %	Scotland 2018/19 %
Red – Trainee	3	6
Red – Experienced worker card	4	5
Green – construction site operative card	31	27
Blue – skilled	36	30
Gold – supervisor card	7	5
Gold – Advanced craft/skilled worker	9	22
Black – contracts manager card	6	1
Academically Qualified Persons Card	1	1
Professionally Qualified Persons Card	1	-
Apprentice Card	3	1
Other	0	<0.5
Unsure	16	1
<i>Unweighted bases</i>	<i>189</i>	<i>371</i>

Q13

Construction qualifications held

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

Over three quarters (77%) of workers in Scotland report having no construction-related qualifications when they started their first job. While this is largely in line with 2018/19 (83%) it is significantly higher than the UK average of 47%, which has decreased significantly since 2018/19 from 72%. This suggests that Scotland has not made the gains in this respect that have been seen across the England and Wales.

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 the highest level of construction qualification held at the time of interview (including the type of qualification, the subject of the qualification, and its level) is derived.

Overall, seven in ten (70%) construction workers in Scotland report holding a construction-related qualification, largely in line with the 75% who did so in 2018/19, and the UK average of 69%.

Those who have been in the industry for five or more years are more likely than average to have a construction-specific qualification (78%), as are permanent workers (73%).

Figure 21: Proportion of workers that hold any construction-specific qualification

Base: All respondents

		Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %
Total (233)		70	75	57	45	69
Age	16 to 19 years (16*)	31	52	-	-	54
	20 to 24 years (28*)	68	71	40	40	64
	25 to 44 years (86)	72	62	46	53	72
	45+ years (100)	73	45	48	71	69
Length of time in construction	<1 year (16*)	31	24	0	25	46
	1 to 2 years (18*)	39	39	0	28	43
	2 to 5 years (35)	63	64	34	43	62
	5+ years (164)	78	60	50	66	75
Current contract type	Employed directly (169)	72	58	46	59	69
	Self-employed (55)	65	58	43	60	74
	Agency (9*)	56	29	45	50	50
<i>Unweighted bases for 2022 in parentheses</i>						

Q15/Q16

* Caution: low base

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 22 summarises the types of qualifications that workers hold and compares the figures to previous surveys (amongst those who have any qualifications and who provided a response).

While as in previous years, the qualifications most likely to be held by construction workers in Scotland are NVQ/SVQ qualifications (52%), which is a similar proportion to previously (58% in 2018/19 and 52% in 2015).

Compared with 2018/19 there has been a decrease in the proportions who have City & Guilds (from 15% to 8%) and those who have an apprenticeship (from 25% to 7%).

Fewer than one in ten hold an HNC/HND/BTEC Higher (7%), and one in twenty (5%) have a degree.

Figure 22: Main type of qualification held

Base: Workers with qualifications (valid responses)

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %
NVQ/SVQ	52	58	52	67	69
City & Guilds	8	15	26	17	18
Construction Award	1	-	-	-	3
Apprenticeship	7	25	21	1	11
HNC/HND/BTEC Higher	7	4	5	3	5
Degree	5	3	2	1	5
Other	2	12	11	2	12
<i>Unweighted bases</i>	<i>162</i>	<i>215</i>	<i>239</i>	<i>133</i>	<i>2,093</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 of a list of specified basic skills to help with their work.

While there has been an increase in the proportion of construction workers who identify a need for any training, from 2% in 2018/19, to 6% in the latest survey, this places Scottish construction workers (alongside those in the North East) among the least likely to identify a need for training in basic skills.

Figure 23: Self-assessed need for training in basic skills

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %
ANY	6	2	9	25	19
Speaking English	5	*	3	11	9
Reading	6	1	5	15	9
Writing	4	1	3	14	7
Maths	4	1	2	14	6
Digital skills	<0.5	Na	Na	Na	4
<i>Unweighted bases</i>	233	404	463	409	3,005

Q37

Current study for additional construction qualifications

Overall, one in ten (10%) construction workers in Scotland are currently working towards formal qualifications relevant to the construction industry (excluding supervisory or managerial qualifications), in line with 2018/19 (11%) and lower than the UK average of 13%.

The likelihood of working towards additional qualifications tend to decrease with age, and with length of time in the industry, but are relatively consistent in terms of contract type and level of qualification.

Figure 24: Proportion working towards additional construction qualifications

Base: All respondents

		Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	UK 2022 %
Total (233)		10	11	11	13
Age	16 to 19 years (16*)	50	59	59	43
	20 to 24 years (28*)	21	22	21	24
	25 to 44 years (86)	8	8	7	11
	45+ years (100)	2	2	4	5
Length of time in construction	<1 year (16*)	25	33	29	28
	1 to 2 years (18*)	33	32	25	27
	2 to 5 years (35*)	20	26	33	20
	5+ years (164)	4	4	6	8
Contract type	Employed directly (169)	12	13	14	15
	Self-employed (55)	4	5	4	10
	Agency (9*)	0	0	0	8
Highest qualification level	None (67)	16	16	8	11
	Level 1 (11*)	9	33	18	17
	Level 2 (75)	4	1	17	12
	Level 3 (42*)	5	0	11	11
	Level 4+ (34*)	15	33	14	16
<i>Unweighted bases for 2022 in parentheses</i>					

Q18

* Caution: low base

Of the 23 construction workers in Scotland¹ who are currently studying for a qualification (and who provided a response) 39% are studying for an NVQ/SVQ, one in eight for an apprenticeship or City & Guilds (both 13%), and one in twenty for an HNC/HND/BTEC Higher or a degree (both 4%).

¹ Number of workers (unweighted)

Supervisory and managerial qualifications and training

As reported earlier, 16% of construction workers in Scotland perform a supervisory or management role at their site, significantly lower than the UK average of 28%, and the lowest of any region/nation.

Amongst those who do not currently perform supervisory/management roles and have not had this role before, one in ten (7%) would like to do so, significantly below the UK average (17%), and the lowest of any region/nation.

Over two thirds (69%) do not wish to take on supervisory roles, up on 54% in 2018/19, and among the highest of any region/nation, matched only by the North East. So as well as being less likely to occupy supervisory roles, workers in Scotland are less likely to wish to do so in future than is the case across the UK.

There are few real differences by age, length of time in construction or contract type.

Figure 25: Whether those who are not currently supervisors want to be one in the future

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

		Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/ depends %
2022 UK (1982)		17	6	59	18
2022 Scotland (192)		7	3	69	21
Age	16 to 19 years (16*)	6	0	81	13
	20 to 24 years (27*)	15	0	48	37
	25 to 44 years (72)	4	3	65	28
	45+ years (74)	5	4	80	11
Length of time in construction	<1 year (16*)	6	6	69	19
	1 to 2 years (16*)	6	0	75	19
	2 to 5 years (33*)	9	0	61	30
	5+ years (127)	7	3	71	19
Contract type	Employed directly (134)	7	1	71	20
	Self-employed (51)	8	6	63	24
	Agency (7*)	0	0	86	14
<i>Unweighted bases for 2022 in parentheses</i>					

Q9

* Caution: low base

A quarter (23%) of all construction workers in Scotland have received formal training designed to improve managerial or supervisory knowledge or skills, up on the 16% who had done so in 2018/19, but lower than the UK average of 33%.

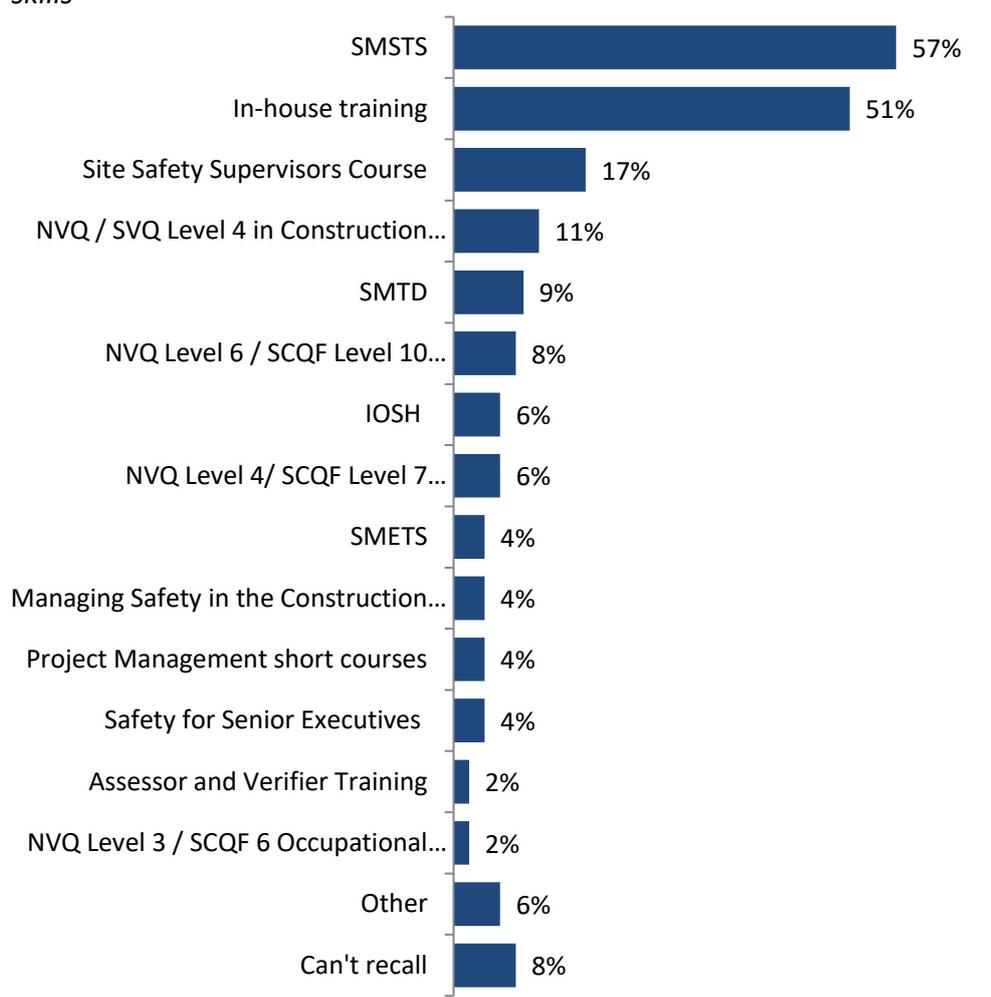
Among those who have or have had some form of supervisory or management responsibilities, nine in ten (89%) have received formal training, somewhat above 2018/19 (84%), and above the UK average (80%).

The proportion that has undertaken any managerial or supervisory training increases with age, to 33% of those aged 45 or over. Likewise, it increases with length of time in the industry, to 28% of those in construction for five or more years.

In terms of the types of supervisory/managerial training undertaken, SMSTS is most frequently mentioned by those who have undertaken any training (57%), followed by in-house training (51%), and Site Safety Supervisors Courses (17%). These were also the top three most mentioned types of supervisory training in 2018/19 and 2015.

Figure 26: Types of managerial/supervisory training undertaken

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



Q11. Unweighted base = 53

Overall skill levels

An overview of the qualification and skill levels of construction workers surveyed has been derived by combining data from various separate measures and is presented in Figure 27 below.

As in previous years, the vast majority (95%) of construction workers in Scotland have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview). While this is in line with the UK average (96%), it is lower than the 100% who did so in 2018/19. This decrease is largely a result of a reduction in the proportion holding a skills card/certificate (from 99% to 91%).

Figure 27: Qualification status summary

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	95	100	95	99	96
Holds a formal construction qualification or a skills card/certificate	94	100	94	98	96
Holds a skills card/certificate	91	99	89	98	93
Holds a skills card/certification but no other qualification	22	21	31	66	19
Working towards a qualification	10	11	11	6	13
<i>Unweighted bases</i>	233	404	463	409	3,005

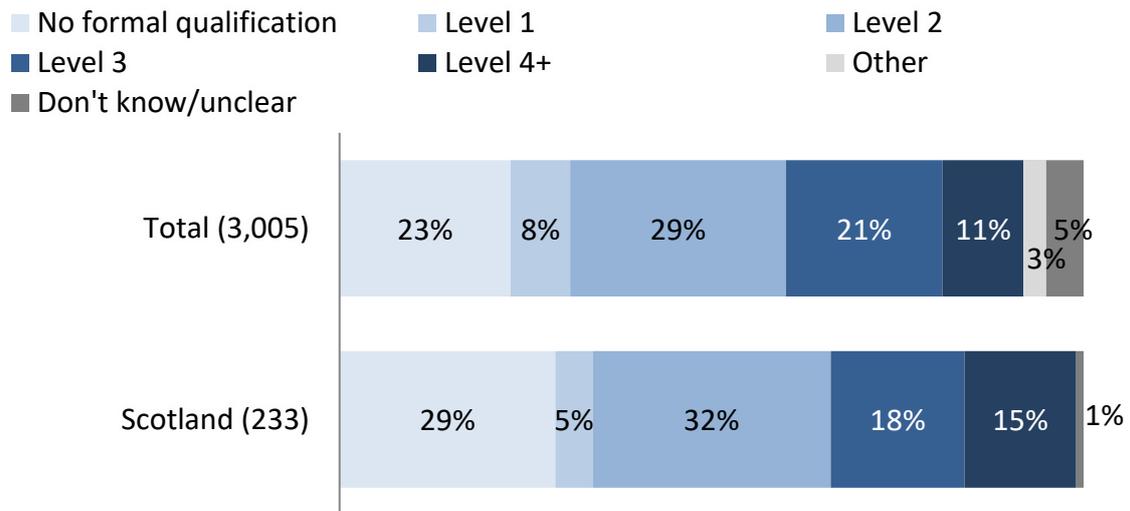
Q12/Q15/Q16/Q18

Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level, and Figure 28 summarises construction workers' highest level of qualification, overall and by occupation.

Overall, two in three (65%) construction workers in Scotland have qualifications equivalent to Level 2 or above, somewhat higher than 2018/19 (57%), and the UK average of 61%, and a third (33%) have level 3 or above, in line with 2018/19 (31%) and the UK average (32%).

Figure 28: Current qualification level, by occupation

Base: All respondents who provided a valid response



Q15/Q16. Unweighted bases in parentheses

* Caution: low base

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 workers commute daily to their current site or whether temporary accommodation is used
- miles travelled to site each day
- whether their next site will be in commuting distance or will require 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.

At 47%, the proportion who grew up in Scotland is in line with 2018/19 (45%) and the UK average of 46%. A similar proportion (46%) say their employer sent them there, down on 2018/19 (58%), but in line with the UK average (47%).

Other reasons were mentioned by 5% or fewer.

Figure 29: Reasons for choosing to work in current location – prompted, multiple response

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	UK 2022 %
You grew up here/have always lived here	47	45	72	46
Employer sent you here	46	58	22	47
Came to the area to take up this/another job	5	1	3	5
Construction work is better paid in this area	3	2	2	4
Family reasons	1	2	5	5
There are more jobs available in this area	1	2	4	3
Because you like it or feel it offers opportunities for better quality of life	1	0	1	1
Better promotional prospects in this area	<0.5	<0.5	1	1
<i>Unweighted bases</i>	233	411	463	3,005

Q28

Three quarters (76%) of construction workers in Scotland have worked within their current region for their whole career, in line with 2018/19 (76%), but significantly higher than the UK average (49%).

A further one in five (20%) have worked in their current region for most of their career, meaning that all but 3% of construction workers in Scotland have worked in Scotland for all or most of their career.

Figure 30: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %
All of your time	76	76	63	49	49
Most of it	20	20	26	29	34
Around half your time	2	2	4	8	8
A small proportion of your time	<0.5	1	4	9	5
Only on this job (this is the first site you've been to in this region/nation)	0	<0.5	2	2	1
Don't know	1	1	<0.5	3	3
<i>Unweighted bases</i>	<i>233</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>3,005</i>

Q26/Q27

In Scotland, nearly all construction workers (96%) indicate their employer operates nationwide, higher than the UK average of 73%, and the lowest of any region/nation apart from Northern Ireland (100%).

Region/nation worked in before current site

Thinking about the last construction site they worked on before their current one, in the majority of cases, workers' last sites are 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 31 illustrates.

Construction workers in Scotland are the most likely of the nations/regions to report that their last site was also in Scotland (98%), as was the case in 2018/19 (98%).

Figure 31 Region/nation currently working in compared with the region/nation of workers' immediately previous construction sites

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)	51	6	*	6	1	0	0	1	0	1	9	5
East of England (EE)	5	66	1	0	*	0	*	5	2	1	6	2
Scotland (GL)	3	10	81	1	1	0	0	12	1	2	4	2
North East (NE)	1	4	0	65	1	0	1	2	1	1	*	1
North West (NW)	2	0	1	8	87	0	*	4	0	0	8	13
South East (SE)	6	10	11	0	1	1	0	66	3	2	1	1
South West (SW)	*	2	1	0	0	0	0	5	84	6	0	1
West Midlands (WM)	13	1	0	10	5	0	0	5	1	3	66	3
Yorkshire & Humber (YH)	15	1	0	10	2	*	0	*	1	0	2	72
Northern Ireland (NI)	1	0	0	0	0	85	0	0	0	0	0	0
Scotland (SC)	1	0	*	0	0	1	98	0	0	0	1	0
Wales (WA)	0	1	0	0	*	0	0	*	3	84	1	1
Republic of Ireland	0	0	*	0	0	13	0	0	0	0	*	0
Other parts of Europe	0	0	1	0	1	0	*	*	0	0	0	0
Outside of Europe	0	0	1	0	0	0	0	*	1	0	0	0
Other / Unsure	1	0	3	0	*	0	0	1	5	1	2	1
Unweighted Bases	216	183	392	195	252	226	226	264	183	193	290	184

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.

Almost all (94%) construction workers in Scotland were living in Scotland when they started their construction career, as has been the case previously (96% in 2018/19), and again this is highest of any nation/region.

Figure 32: Region/nation currently working in compared with workers' region/nation of residence prior to first starting work in construction

Base: All respondents *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)	53	5	1	7	*	0	0	1	*	1	5	5
East of England (EE)	7	67	5	0	0	0	0	3	1	*	6	1
Scotland (GL)	2	13	64	1	*	1	0	14	3	1	1	4
North East (NE)	2	3	*	67	3	0	1	1	*	*	*	0
North West (NW)	1	0	1	6	89	0	0	4	*	1	6	13
South East (SE)	3	7	10	*	*	0	0	64	3	*	2	1
South West (SW)	*	*	1	*	0	*	0	5	81	3	*	0
West Midlands (WM)	13	1	1	8	4	*	0	4	*	0	74	1
Yorkshire & Humber (YH)	15	2	1	8	2	*	0	0	0	0	2	75
Northern Ireland (NI)	1	0	*	0	0	92	0	*	0	0	0	0
Scotland (SC)	1	0	1	1	*	0	94	1	*	0	1	1
Wales (WA)	0	0	1	0	0	0	0	*	5	90	2	0
Republic of Ireland	*	0	*	0	*	4	2	*	0	0	*	0
Other parts of Europe	1	0	7	*	*	2	3	2	*	1	*	0
Outside of Europe	0	1	3	*	0	*	*	*	*	0	*	1
Other / Unsure	*	0	2	0	0	0	0	0	2	0	0	0
Unweighted Bases	232	202	443	206	271	226	233	283	201	202	306	200

Q40

Travel to site

Location of current workplace in relation to the location of workers' current homes

All construction workers in Scotland were interviewed on a site that was located within the same region/nation as their permanent home, as was the case in 2018/19. Only in Northern Ireland is this also the case.

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.

A third (32%) of construction workers in Scotland have worked no further than 20 miles away from their home, in line with 2018/19 (30%) and the UK average (33%).

A further three in ten (31%) have worked between 21 and 50 miles away, up on 2018/19 (21%) but in line with the UK average of 34%.

This leaves one in three (36%) who have worked more than 50 miles away, including 14% who have worked over 100 miles away, a significant decline on the 28% who had done so in 2018/19.

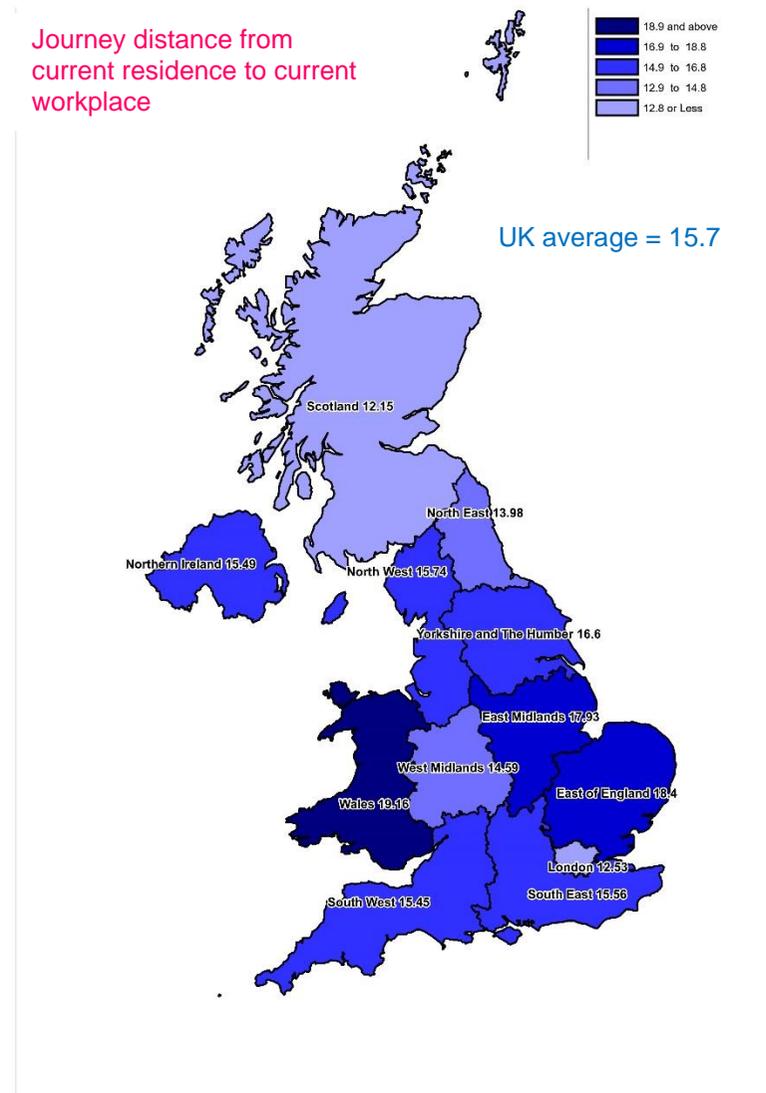
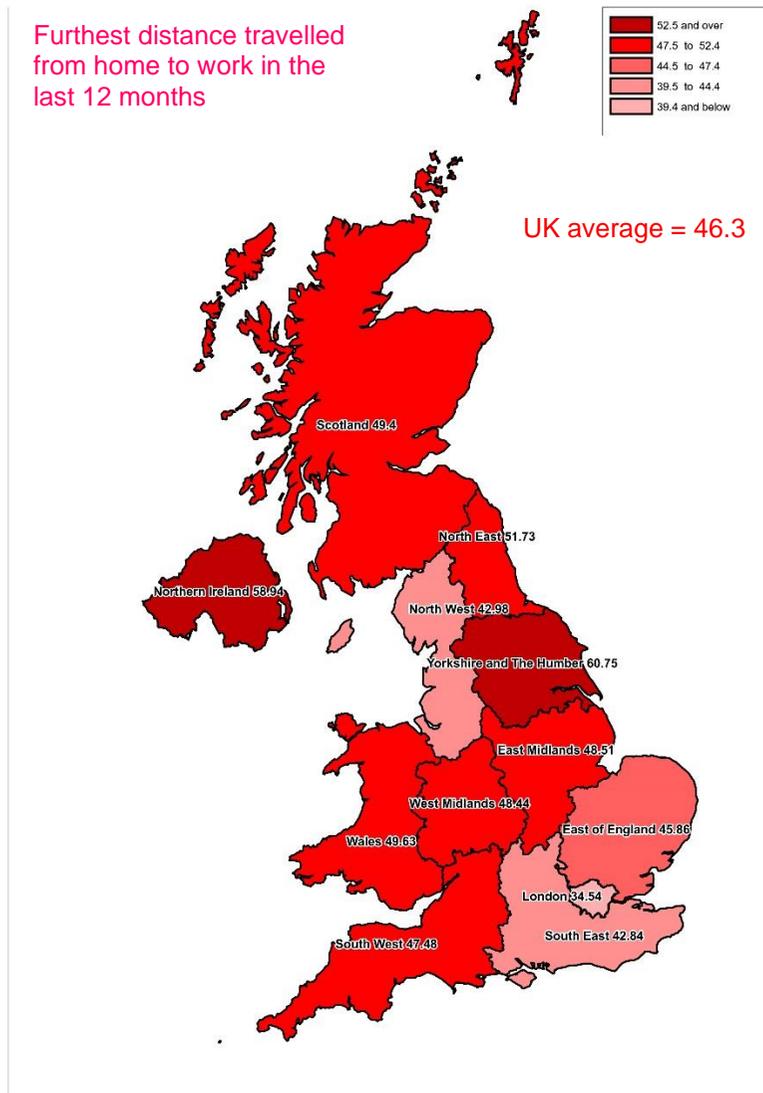
Consequently, the average furthest distance travelled by construction workers in Scotland is 49 miles, in line with the UK average of 46 miles.

Journey distance to work

The average (mean) distance from workers' current residence (taking into account temporary residences) to their current site is 12 miles, down on 2018/19 (18 miles) and 2015 (16 miles), and a somewhat shorter distance than the UK average of 16 miles.

This downward trend is also reflected in the national picture, where the average distance of 16 miles is down on 18 miles in 2018/19, 22 miles in 2015 and 28 miles in 2012.

Close to half (45%) of those providing a response travel less than 10 miles to work, up on 2018/19 (38%), three in ten (30%) travel between 10 and 19 miles (compared to 22% in 2018/19), and 25% travel further than this (compared to 32% in 2018/19).



Use of temporary accommodation

One in twenty (6%) construction workers in Scotland report that they are currently staying in temporary accommodation while working at their site, in line with previous years (2% in 2018/19 and 7% in 2015), and with the UK average.

Expected site/phase duration

All the workers in Scotland who are currently employed on a temporary basis (21% of all construction workers) were asked how much longer they expect to be working for the company/person/agency paying them.

Responses range from 2% who expect to work for the rest of the week, 2% expecting another one to four weeks, 20% for one to six months, a third (36%, significantly higher than the UK average of 20%) for six to twelve months, and one in ten (8%) for more than a year. A third (32%) do not know how much longer they expect to be working, somewhat lower than 2018/19 (41%), but in line with the UK average (32%).

In order to get a measure of workplace stability amongst all construction 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. One in twenty (6%) of construction workers in Scotland do not expect to work on that site for more than a month, lower than 2018/19 (14%) and the UK average (12%). Just 1% believe they will be there for less than a week.

While a higher proportion of workers in Scotland expect to be on site for between six and twelve months than the UK average (33% compared to 25%), the reverse is true in relation to being on site for more than a year (4% compared to 13%).

Three in ten (30%) are unsure in this respect, down on the 39% who were unsure in 2018/19, but remaining higher than the UK average of 22%.

Figure 33: Length of time workers expect to work at that specific site during current phase*Base: All respondents*

	Scotland 2022 %	Scotland 2018/19 %	UK 2022 %
Less than a week	1	3	2
1-2 weeks	<0.5	3	3
2-3 weeks	0	4	3
3-4 weeks	5	3	4
1-3 months	8	10	11
3-6 months	18	12	17
6-12 months	33	19	25
More than a year	4	7	13
Don't know	30	39	22
<i>Unweighted bases</i>	<i>233</i>	<i>404</i>	<i>3,005</i>

Q24

Expected next site location

A majority (77%) of all construction workers in Scotland 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, in line with 2018/19 (80%) and higher than the UK average (69%). The proportion who are sure that this will not be the case has remained stable (4% compared to 3% in 2018/19), as has the proportion who say it depends where the work is has increased (11% in both instances). The remaining 7% do not know.

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 undertaken for a continuous period of at least 3 months.

New housing remains the most common types of work undertaken in Scotland (89%), as was the case in 2018/19 (89%) and 2015 (86%), followed by housing repair and maintenance (61%), which has seen a significant increase since 2018/19 (48%), such that it is significantly higher than the UK average of 42%.

By contrast, commercial, private industrial and public non-housing work have seen declines, from 46% to 33% for commercial work, from 40% to 27% for private industrial work, and from 43% to 21% for public non-housing work. The latter two now sit below the UK average (35% and 32% respectively).

Infrastructure building projects have remained stable, with 27% having spent time on these, as compared to 26% in 2018/19 and UK average of 23%.

At 27%, the proportion of construction workers in Scotland who have worked on only one type of project is lower than the UK average of 42%.

Figure 34: Type of projects on which workers have spent significant periods of time
Base: All respondents

	Scotland 2022 %	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	UK 2022 %
New housing	89	89	86	67	78
Housing repair and maintenance including extensions/loft conversions	61	48	42	55	42
Commercial work such as shops, office, pubs etc	33	46	40	43	39
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	27	40	32	44	35
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	27	26	16	45	23
Public non-housing work such as schools, sports facilities, landscaping	21	43	35	40	32
Off-site manufacturing	6	Na	Na	Na	6
ONE TYPE ONLY	27	23	43	27	42
TWO TYPES	31	23	13	17	17
THREE TYPES	19	21	15	18	13
FOUR TYPES	12	13	10	13	9
FIVE TYPES	5	10	11	13	9
SIX TYPES	6	10	8	11	6
<i>Unweighted bases</i>	233	404	463	409	3,005

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.

Over four in five (86%) construction workers in Scotland think it is likely that they will still want to do so, including 49% who say they definitely will be, and 30% who think it is very likely. This is in line with the UK average of 82%.

One in twenty (4%) say it is unlikely that they will still want to work in construction in five years' time (compared with a UK average of 7%).

Figure 35: Likelihood of construction workers still wanting to be working in the construction sector in five years' time

Base: All respondents

	All %	Age %			
		16 - 19	20 - 24	25 - 44	45+
Definitely will be	49	38	68	56	40
Very likely	30	31	18	35	28
Quite likely	7	6	0	7	9
Quite unlikely	2	6	4	0	3
Very unlikely	1	6	4	0	1
Definitely will not be	1	0	0	1	1
Hope to be retired	6	0	0	0	14
Don't know	4	13	7	1	4
<i>Unweighted bases</i>	<i>233</i>	<i>16*</i>	<i>28</i>	<i>86</i>	<i>100</i>

Q38A

* Caution: low base

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 53% believe they will definitely want to be working in the construction sector, 31% 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.

Overall, 92% of this group are likely to some degree to want to be working in the sector, in line with the 91% who did so in 2018/19. Just 4% of this age group think it unlikely they will want to be working in the construction sector in five years (compared with 5% in 2018/19).

The construction workforce in Scotland 2022 - summary

The UK construction industry

Across the UK, the survey findings point us towards the conclusion that the construction industry is not in a particularly dynamic phase.

Following the sharp dip in industry output in value terms during the worst months of the Covid pandemic, there was a very sharp recovery from April to June 2021 followed by more steady growth to a point where output is broadly at its pre-pandemic level. Low growth is anticipated in the near future, with a relatively high rate of inflation and increases in the base interest rate likely to increase costs and dampen demand.

Correspondingly, the industry's workforce which suffered minor decline in 2020/2021 is also anticipated to be fairly static in aggregate with the major labour and skills driver being a need to recruit around 200,000 new workers per year as a result of an industry 'churn rate', estimated at around 8% of a 2.6 million total workforce, rather than substantial change in the total workforce (*The Skills Construction Needs*, Construction Skills Network, CITB, January, 2023).

Stability within the construction industry in Scotland

However, a substantial proportion of industry workers, as surveyed here, have been in the industry for lengthy periods. Across the UK, as in Scotland, around 70% of workers have worked in the industry for 5 years or more, and this reflects findings from previous surveys. Demographic and other characteristics of the workforce therefore change little overall, and with only 11% of workers (10% in Scotland) expecting to leave construction in the next 5 years, changes to the demography of the workforce can occur only at the margin. A doubling of the percentage of female entrants would have only a minor effect on the overall structure of the workforce. If, however, there was a doubling of ethnic minority entrants, then the proportion would begin to represent more accurately the profile of the working age Scotland population.

The structure of the workforce remains – and is set to remain in the near future – very substantially male in its composition, particularly as, in this case, the 'workforce' was defined as comprising on-site and predominantly manual staffing, largely excluding clerical, administrative, technical, and professional construction occupations in which women, particularly, are more strongly represented.

The occupational profile of the workforce as identified by the survey also remains unchanged from previous years with labourers, and carpenters remaining most frequent, followed by much lower levels of representation of other industry trades.

Where survey respondents reported that they had changed roles within the industry, the distribution of prior occupations broadly reflects the current distribution of occupations in

the workforce as a whole. Aspirations to a different future occupation are infrequent, as only 7% of workers across the UK (8% in Scotland) want to change their occupation.

Some indicators of change

Across the UK a further area of observed stability includes broad measures of qualification and training. For example, around seven in ten workers hold a construction-related qualification, 13% are working towards a qualification and 33% have had supervisory or management training.

All these figures are broadly similar to those observed in 2018/19, and are largely reflected in Scotland, with the exception that a lower proportion have had supervisory or management training (23% compared with 33%).

Nationally there appears to be greater reticence in taking on more responsibility this year than previously, with fewer respondents certain they want to become a supervisor or manager in the future, (23% across the UK, compared with 30% in 2018/19). This is to an even greater extent in Scotland, where only 10% wish to take on a supervisory role, and 69% are certain that they do not wish to do so, up from 54% in 2018/19.

While over nine in ten (91%) of all construction workers in Scotland report holding a skill card or certificate, this is a reduction on the 99% who did so in 2018/19. While this reflects the UK picture, which has seen a similar decline (from 97% to 93%), the decrease in Scotland is among the most marked.

Over three quarters (77%) of workers in Scotland report having no construction-related qualifications when they started their first job. While this is largely in line with 2018/19 (83%) it is significantly higher than the UK average of 47%, which has decreased significantly since 2018/19 from 72%. This suggests that Scotland has not made the gains in this respect that have been seen across the England and Wales.

At the time of interviewing, seven in ten (70%) construction workers in Scotland reported holding a construction-related qualification, which is in line with the 75% who did so in 2018/19, and with the UK average (69%).

Since the 2015 and 2018/19 surveys, unlike the UK, where the proportion of direct employees has decreased, in Scotland this has remained relatively stable (73%, compared to 75% in 2018/19 and 70% in 2015), and is significantly higher than the UK average of 48%). A quarter (25%) are self-employed, as compared to a national average of 42%. There is little change in the level of agency employment. Scotland also has the lowest proportion of temporary workers (21%).

This high level of direct employment is likely to positively impact workers, increasing levels of certainty and security. Potentially, it may result in higher levels of employer-led training, and attention to improving the skills of the workforce. However, it may also have a negative impact for both employers – reducing flexibility and the ability to control costs – and for workers – resulting in reduced independence.

Another area of change identified by the survey concerns working hours. While across the UK, workers are most likely to report that they work between 40 and 49 hours per week (59%), in Scotland this reduces to 35%. By contrast, workers in Scotland are more likely than average both to report working fewer hours than this (39% work between 30 and 39 hours as compared to a UK average of 16%), and to report working 50 or more hours (25% compared to 19%), and the latter represents a significant uplift on 2018/19 (8%).

Consequently, in contrast to 2018/19 where Scotland had the lowest proportion of workers who worked for 50 or more hours, it now has the second highest proportion, after London.

The change raises interesting questions as to whether some technological changes are permitting fewer but more productive hours for some workers; or whether workforce culture, in line with general trends since Covid, is disposing some workers to put personal time ahead of overtime hours; or, simply, whether demand pressures in the industry are lower.

The survey identified that across the UK the average travelling distance to work has continued to reduce over time, from 22 miles in 2015, to 16 miles in 2022. Scotland workers have historically had to travel less far than workers in other regions, and this remains the case, with an average of 12 miles, down from 18 miles in 2018/19.

Focus on how Scotland differs from the UK average

Compared with the construction workforce across the UK as a whole, Scotland stands out in several respects:

- Within Scotland, the age profile of construction workers has continued to become older than in previous years, and is significantly older than the UK average, and the wider UK workforce, as has been the case in previous years, with 23% aged 55 or over, compared to a UK average of 13%
- Although the proportion of the Scotland population that represent an ethnic minority group has increased slightly over time, at 3%, it is below the UK average (7%) and the proportion of the wider Scotland population (6%)
- Fewer construction workers in Scotland originate from outside the UK (6% compared to 17%), nine in ten (89%) hold a UK passport, compared to the UK average of 78%, and over nine in ten (92%) have lived in the UK all their lives, compared to the UK average of 80%
- Around one in six (16%) construction workers in Scotland say they perform a supervisory or management role on their site, significantly lower than the UK average of 28%. Furthermore, over two thirds (69%) do not wish to take on supervisory roles, up on 54% in 2018/19, and among the highest of any region/nation. So as well as being less likely to occupy supervisory roles, workers in Scotland are less likely to wish to do so in future than is the case across the UK

- Three quarters (73%) of construction workers in Scotland are directly employed, and this is significantly higher than the UK average of 48%. Just around a quarter (24%) are self-employed, compared to the UK average of 42%
- At 21%, the proportion of construction workers in Scotland who are employed on a temporary basis is the lowest of any nation/region.
- The proportion of construction workers in Scotland who have worked pretty much continuously in the industry is significantly higher than the UK average (76%, compared to 61%).
- Construction workers in Scotland are less likely than average to have worked in more than one construction trade or occupation whilst working in the construction industry (16%, compared to 35% across the UK).
- Workers in Scotland are significantly less likely than the UK average to feel they need training in basic skills (6% compared to 19%).
- Three quarters (76%) of construction workers in Scotland have worked within their current region for their whole career, a significantly higher proportion than the UK average (49%). Construction workers in Scotland are more likely than those located elsewhere in the UK to report that their last site was also in Scotland (98%).
- All construction workers in Scotland were interviewed on a site that was located within the same region/nation as their permanent home, as was the case in 2018/19. This is also the case in Northern Ireland.
- Fewer workers in Scotland expect to be on site for more than a year than the UK average (4% compared to 13%).
- Housing repair and maintenance is significantly more likely to be the area of construction employing workers in Scotland than the UK average (61%, compared to 42%). However, at 27%, the proportion of construction workers in Scotland who have worked on only one type of project is lower than the UK average of 42%.

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