

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

Scotland Report - April 2019





Study prepared by BMG Research from a commission by CITB.

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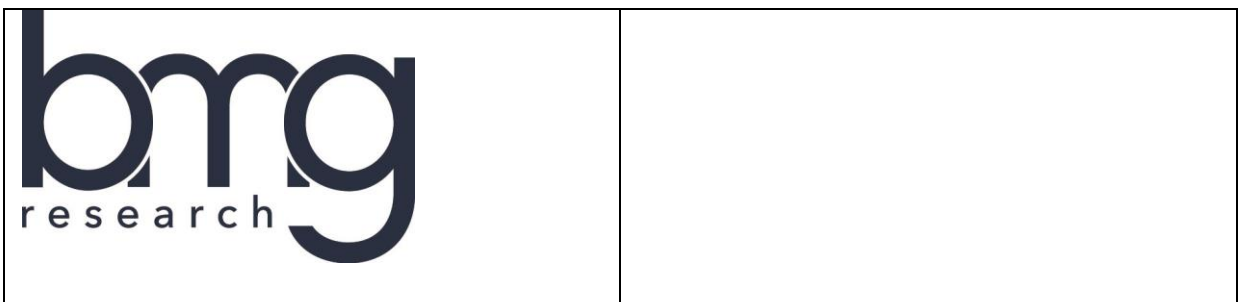




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Executive summary

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 404 interviews were conducted with construction workers in Scotland.

Profile of the sample

- 100% of construction workers are male. Nearly half the construction workers interviewed in Scotland are aged under 35 (44%), which is a higher proportion than the UK population as a whole (36%), but similar to the UK average in the survey (45%). Just 6% of construction workers are aged 60 or over.
- Overall, 1% of the Scottish construction workforce is of BME ethnic origin, compared with a higher incidence of 5% in the Scottish population as a whole. The UK average in the survey is 6% (compared with 15% of the UK population as a whole).
- By trade/occupation, the highest proportion of the Scottish sample is accounted for by labourers/ general operatives (27%), followed by bricklayers and carpenters/joiners (both 14%). Compared with 2015, the proportion of labourers/general operatives has increased (21% in 2015) whilst the proportion of carpenters/joiners has declined (24% in 2015).
- One in six of all those interviewed in Scotland perform a supervisory or management role on their site (15%); a lower proportion than in 2015 (21%) and compared to the UK average in 2018/19 (30%).
- Three-quarters of construction workers interviewed for the survey in Scotland are employed directly by a company (75%), which is a higher proportion than the UK average (of 49%). One quarter of workers in Scotland is self-employed (24%) and this is a lower proportion than the UK average (of 43%). Since 2015, there has been an increase in the proportion that are directly employed (from 70% in 2015) and a slight decrease in the proportion that are self-employed (from 25% in 2015). Just 1% of construction workers in Scotland work for an agency, which compares with 7% nationally and 5% within Scotland in 2015.
- The likelihood of being self-employed increases with time spent working in construction, from 11% of those that have worked in construction for less than a year to 26% of those that have been working in the industry for 5+ years.
- More than one in five of all construction workers in Scotland (22%) 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 bricklayers and scaffolders (36% and 31% respectively) and lowest amongst plumbers (13%) and labourers/general operatives (12%).
- In contrast to the UK as a whole, Scottish construction workers are most likely to report that they work between 30 and 39 hours per week, and this proportion is higher than for any other



region/nation (56% cf. 15% across the UK). A third of construction workers in Scotland work between 40 and 49 hours per week (35%, compared with a UK average of 60%), and 1 in 10 works more than 50 hours per week (8%), which is significantly lower than the UK average (23%).

Work history

Time in the sector

- A third of all construction workers in Scotland have worked in the industry for at least 20 years (32%), similar to the UK average (32%). Over half have done so for 10+ years (56%).
- Around five in six construction workers in Scotland have only ever worked within the construction industry (86%), an increase on 2015 (74%) and higher than the UK average (67%). More than two-thirds of construction workers in Scotland (70%) have worked in construction pretty much continuously, without spells out of work, and this is a higher proportion to that across the UK (56%).

Previous non-construction jobs

- Amongst the one in six construction workers in Scotland that worked in another sector before starting work in construction (14% of all respondents), the sector worked in beforehand is most likely to have been wholesale and retail (41%).
- In terms of the job roles that construction workers previously did in other sectors, the highest proportion worked in skilled trades occupations (35%), followed by sales and customer services occupations (24%).

Occupational switching within the construction sector

- Just one in ten construction workers in Scotland (10%) have worked in more than one construction trade or occupation whilst working in the construction industry. This proportion is lower than in 2015 (26%) and compared to the UK average in 2018/19 (36%). The proportion that has worked in more than one role is significantly higher amongst those with Level 4+ qualifications (22%) and those in a supervisory or management role (28%).
- Workers are most likely to have previously worked as a labourer/general operative (33%) or as a carpenter/joiner (31%).
- Thinking about their future plans in the construction sector, just over 8 in 10 construction workers in Scotland would like to carry on in the same trade or occupation (83%), while just 1 in 20 would like to change their trade/occupation (5%) and a further 2% would like to leave the construction industry altogether. The proportion that wants to carry on as they are is slightly higher in Scotland than the UK average (80%).
- The most popular occupation that construction workers in Scotland would like to change to is site manager (50% of those who would like to change).



- Nine in ten construction workers in Scotland that would like to change trade/occupation (90%) believe they will require further training or qualifications in order to do so. This is a slightly higher proportion than the UK average (87%).
- The main reason for wanting to change trade/occupation is the belief that workers will be better paid (80%), followed by workers wanting less physical work (50%), the opportunity to use their skills/abilities better (40%) and wanting more interesting work (or being bored with what they are currently doing) (30%).

Qualifications and skills

Skills cards/certificates

- Most construction workers in Scotland, as across the UK as a whole, hold some form of construction skill card or certificate (99% cf. 88% in 2015, 98% in 2012 and a UK average in 2018/19 of 97%).
- Younger workers (95% of 16-19 year olds) are slightly less likely to hold a skill card/certificate, but not significantly so, unlike across the UK as a whole.
- In terms of the type of skill card/certificate held, CSCS remains the most commonly held overall (92% in Scotland; 85% across the UK).
- Card colours vary by age and particularly by occupation; younger workers are more likely to hold Red Trainee cards (65% of 16 to 19 year olds with a CSCS card), workers aged 25-44 are more likely to hold Blue cards (36%); labourers/general operatives are most likely to hold Green cards (63%).

Construction-specific qualifications

- Five in six construction workers in Scotland say they had no formal qualifications when they first started working in the construction industry (83%). 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 scaffolders (100%) and labourers/general operatives (96%), and lowest among bricklayers (67%).
- Compared with one in six construction workers in Scotland that did have qualifications when they first started working in construction (17%), overall, three-quarters of all construction workers in Scotland reported holding some sort of construction related qualification at the time of interview (75%, compared with 57% in 2015 and a UK average in 2018/19 of 72%).
- Within Scotland, 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 (22%), increasing to four-fifths construction workers who have worked in construction for 5 or more years (84%).
- By trade/occupation, proportions vary from the majority of bricklayer (98%), carpenters/joiners (96%) and plumbers (92%), down to less than a third of labourers/general operatives (28%).



- The qualifications most likely to be held by construction workers in Scotland are NVQ/SVQ qualifications (58% of those with qualifications) while 1 in 6 construction workers in Scotland with qualifications hold City & Guilds qualifications (15%). A quarter of construction workers with qualifications now hold an apprenticeship (25%).

Basic skill needs

- Just 2% of construction workers in Scotland believe they would benefit from some form of training in basic skills, which is a smaller proportion to previous years (9% in 2015 and 25% in 2012) and to the UK average in 2018/19 (11%).

Current study for qualifications

- One in nine construction workers in Scotland are currently working towards formal qualifications relevant to the construction industry (11% cf. 11% in 2015, 6% in 2012 and a UK average in 2018/19 of 15%). This proportion is higher amongst 16-19 year olds (59%) and amongst those who have worked within the construction industry for less than a year (33%).
- Amongst workers with no qualifications, 16% are currently working towards a qualification.

Supervisory/managerial training

- Of those not currently performing a supervisory/management role, more than half are certain that they would not like to do so (54%), a higher proportion than across the UK (51%), while one in ten would like to do so (10% cf. 20% in 2015) and over a third are unsure (36%).
- One in six construction workers in Scotland (16%) and just over four-fifths of those who have had some form of supervisory or management responsibilities (84% cf. 73% in 2015 and 80% in 2012) have received any formal training designed to improve managerial or supervisory knowledge or skills. These proportions are lower than the UK average (34% and 81% respectively).
- In-house training is more frequently mentioned as the type of training received (67%), followed by SMSTS (Site Manager Safety Training Scheme) (45%) and Site Safety Supervisors Courses (35%).

Overall skill levels

- The vast majority of construction workers in Scotland (the percentage can be rounded to 100%, but this does not include all workers surveyed) have a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview): less than 1% of those interviewed could not say that they were at least working towards obtaining a CSCS card (or similar) or construction qualification. Just over one in five of Scotland's construction workers (21%) holds a skill card/certificate, but has no other construction qualification. This compares with a UK average of 22%.
- Overall, more than half of Scottish construction workers that provided a response have qualifications equivalent to Level 2 or above (57% cf. 52% in 2015, 34% in 2012 and 59% across the UK in 2018/19); nearly a third hold qualifications equivalent to Level 3 or above (30% cf. 30% in 2015 and 25% in 2012).



Geographic mobility

Work history in the region/nation

- That their employer sent them there (58%) or the fact that they grew up there/have always lived there (45%) are the most likely reasons why construction workers are based within Scotland. A higher proportion state that it is because their employer sent them there in 2018/19 than in 2015 (22% in 2015) and this reflects the UK wide picture.
- In 2018/19 compared with 2015, a higher proportion of construction workers in Scotland have worked within their current nation for their entire construction career (76% cf. 63% in 2015 and 49% in 2012) and the majority of construction workers in Scotland have remained there for all or most of their career (96%). This is higher than the UK average of 77%.
- Most construction workers in Scotland (98%) were also based in the nation for their last job and this proportion is similar to that in 2015 (94%).

Worker origins

- Overall, most construction workers interviewed in Scotland were living there when they started their construction career (96% cf. 96% in 2015). There are considerable variations in the extent to which workers have remained in their original locality, with the proportion being highest in Scotland (96%) and Northern Ireland (95%), and lowest in the East of England (44%).
- The vast majority of construction workers in Scotland (96%) also completed their first qualification/training there. Compared with other regions/nations, this is the highest proportion whilst the lowest is the South East (41%).

Travel to site

- Under half of construction workers in Scotland have travelled at least 50 miles from their permanent/current home to work in the last 12 months (46%). Across the regions/nations, Scottish construction workers are amongst those most likely to have travelled more than 100 miles from their permanent home to work in the last 12 months (28%).
- Overall, just 2% of construction workers in Scotland (7% 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 residences (taking into account temporary residences) to their current site was 18 miles (18 miles is also the UK average) which is slightly more than in 2015 when workers in Scotland travelled an average (mean) of 16.3 miles.

Site duration and change

- Two in five temporary workers in Scotland (41%) do not know how much longer they expect to be working for their current company/agency. This compares with a UK average of 38%.
- 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, 7% expect to stay on that site for a year or longer (UK average of 18%), which is a significant decrease compared with 2015



(27%). However, in two in five cases (39% cf. 30% in 2015) workers do not know how much longer they can expect to be on site, indicating an increase in the degree of uncertainty in the last 3-4 years.

- Four in five of all Scottish 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 (80% cf. 81% in 2015 and 63% in 2012). This is a lower proportion than the UK average in 2018/19 (84%). The remaining fifth say it depends/they don't know or that they won't be able to commute.

Sub-sector and sector mobility

Sub-sector mobility

- As in 2015, the vast majority of construction workers in Scotland have worked on new housing (89% cf. 86% in 2015 and 67% in 2012). For all other types of projects the proportion of construction workers that have worked on them has risen since 2015.
- Just under a quarter of construction workers in Scotland have only worked on one project type (23%), which is a lower proportion than in 2015 (43%) and within most other regions/nations (UK average is 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 Scotland, more than half say they definitely will be (55% cf. UK average of 48%); a further third think it is very or quite likely (36%); 3% consider it unlikely; and just 1% say they definitely won't be. A further 1% hope to be retired by then, while 5% 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, 404 interviews were conducted in Scotland.



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
Unknown (paper copies returned by post)	2	N/A
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.

Scotland is referred to by the abbreviation 'SC' 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 Scotland, compared with the 2015 survey and official statistics from the Annual Population Survey (where comparisons are possible).

All of construction workers in manual roles interviewed in Scotland were male (100%). 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 in maintenance and repair.

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

	SC 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>404</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 Scotland, the youngest age group (16 to 24 year olds) account for a fifth of construction workers (20%), the same proportion as in 2015 (20%) and much higher than in 2012 (12%). Those aged 25 to 34 years account for a quarter of construction workers (24%), slightly up from 2015 (22%). For the third time in a row, the proportion of construction workers aged 35 to 44 years has declined. 1 in 5 construction workers in Scotland are aged 35 to 44 (20%), whilst in 2007 those aged 35 to 44 years accounted for more than a quarter of construction workers in Scotland (27%). There are similar numbers of 45 to 54 year olds among construction workers in Scotland compared with 2015 (20% cf. 20%). The proportion of workers aged 55 and over has increased slightly (16% in 2018/19 and 14% in 2015). Workers aged 60 and over account for just 6% of construction workers.

Compared with the UK construction workforce overall there is a similar proportion of construction workers aged under 35 years within Scotland (44% in Scotland cf. 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

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %		UK Workforce* %
16 to 19 years	5	6	2	9	5	16 to 19 years	4
20 to 24 years	14	14	10	14	12	20 to 24 years	9
25 to 34 years	24	22	27	23	28	25 to 34 years	23
35 to 44 years	20	21	24	27	23	35 to 49 years	33
45 to 54 years	20	20	22	16	20	50 to 64 years	27
55 to 59 years	10	7	14	10	7		
60+ years	6	7			4	4	65+ years
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>240</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 Scotland are of White origins, consistent with previous years (99% cf. 98% in 2015 and 98% in 2012).

Workers of Black (0%), Asian (0%) and other (1%) ethnic origin (BME) make up a very small proportion of the sample as in previous years.



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

Base: All respondents

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %	UK Population aged 16-64* %
White	99	98	98	100	94	85
Black	0	<0.5	0	0	2	3
Asian	0	0	1	0	2	6
Mixed	0	-	-	-	1	1
Other/Not stated	1	1	1	0	1	4
<i>Unweighted bases</i>	404	463	409	240	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 Scotland population as a whole (aged 16-64), a lower proportion of Scotland's construction workers are of BME origins (1% cf. 5% amongst the Scottish population and 15% of the UK population).

Compared with other regions/nations, Scotland has a low proportion of construction workers that are of BME origin.

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
<i>Unweighted bases</i>	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 Scotland (97%) originated from the UK and the remaining 3% originated from outside the UK. No more than 1% of construction workers originate from a single specified country, while 3% of construction workers originate from another EU country and less than 0.5% originate from a country outside of the EU.

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

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

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

Just 3% of construction workers in Scotland hold a passport for another country. This compares with a UK average of 14%. The majority hold a UK passport (90%), with a further 6% reporting that they do not have a passport. Of those with a non-UK passport, the majority (93%) that it is an EU member state passport. The remainder (7% of those with a non-UK passport) prefer not to say.

Of those construction workers in the Scotland that were born outside of the UK or have a non-UK passport, just 1 in 10 have British citizenship (10%), which compares with a UK average of 14%.

Overall, most Scottish construction workers have lived in the UK all of their life (94%). This proportion is significantly higher than the UK average (80%).

Amongst all Scottish construction workers, two per cent indicate that they have a long-term illness, health problem or disability which limits the type of work they can do. The most common illnesses/disabilities amongst these workers is to do with reduced physical capacity, (such as an inability to lift, carry or otherwise move everyday objects, debilitating pain and lack of strength, breath, energy or stamina, asthma, angina or diabetes) , or physical co-ordination (including manual dexterity, muscular control, and cerebral palsy) (both 33%).



Next most common are hearing issues (22%). A further 11% report mobility limitations. Across the UK, 3% of construction workers indicate they have a long-term illness, health problem or disability, and the most common condition is a reduced physical capacity (50%).

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 and carpenter/joiners are the top three occupations amongst construction workers in Scotland. This reflects the profile across the UK, although there are fewer site managers within Scotland. There has been an increase in the proportion of labourers/general operatives since 2015 (from 21% in 2015 to 27% in 2018/19) and these workers form a higher proportion of the Scottish workforce than across the UK.

Figure 7: Occupational profile

Base: All respondents '-' = not applicable

	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	Scotland 2007 %	UK 2018/19 %
Labourer/General operative	27	21	33	25	16
Bricklayer	14	11	7	8	11
Carpenter/joiner	14	24	8	19	10
Scaffolder	7	2	3	3	4
Plumber	6	8	3	5	4
Painter/decorator	5	5	2	2	2
Plant/machine operative (e.g. fork lift/JCB)	4	5	9	10	7
Site manager	4	7	0	0	11
Electrician	4	3	5	4	6
Technical	2	-	-	-	4
Pipe fitter	2	-	-	-	2
Ceiling Fixer	2	-	1	With plasterer	-
Roofer	2	3	5	4	-
Steel erector/rigger	2	-	4	-	-
Technical	2	-	-	-	4
Dryliner	1	1	<0.5	With plasterer	3
Supervisor/foreman	1	1	0	0	2
Other	1	-	-	-	3
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>240</i>	<i>4048</i>



Q5

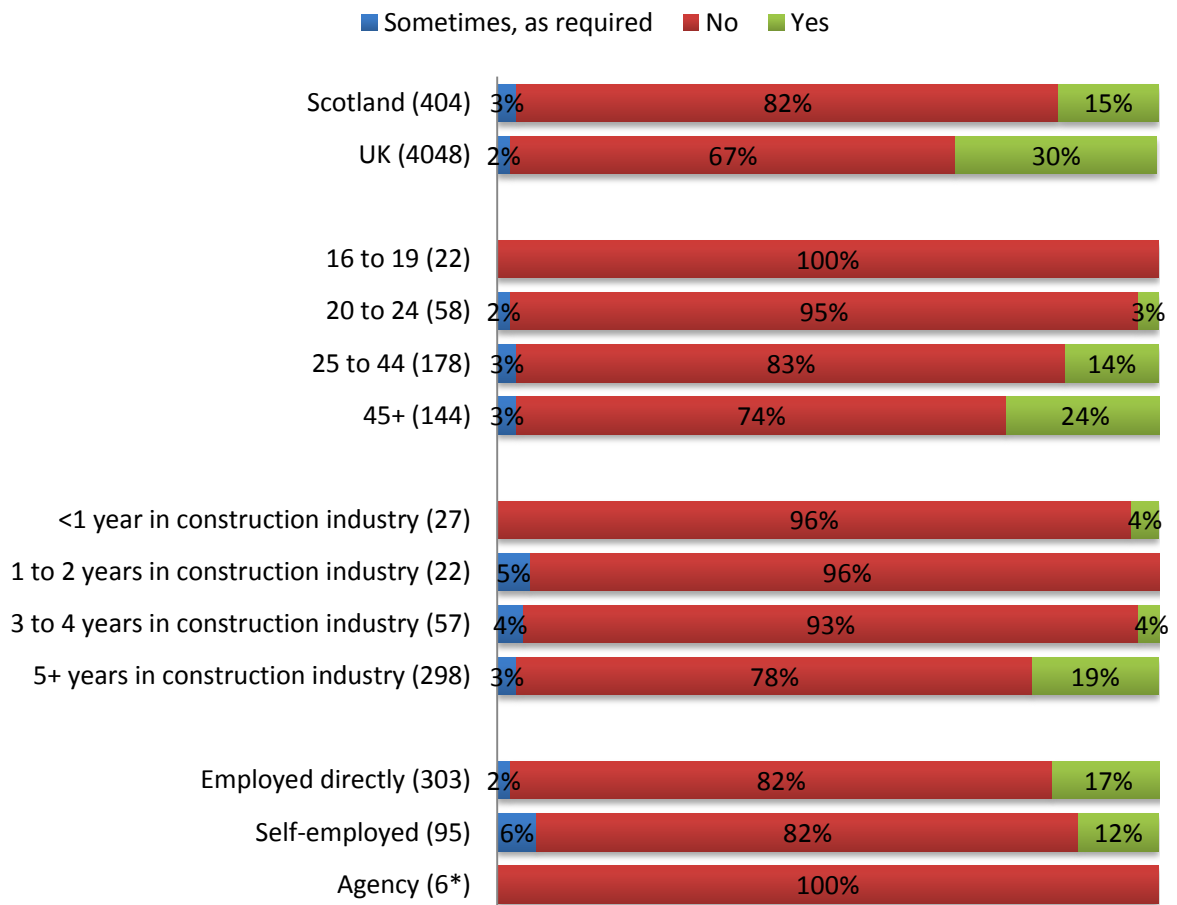
Supervisory roles

Just 15% of all construction workers in Scotland interviewed for the 2018/19 survey say they perform a supervisory or management role on their site. This is a lower proportion than in 2015 (21%), 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 and amongst those that have worked in the construction industry for less than 5 years, as one would expect. Workers who are directly employed by a company (17%) are more likely than those that are self-employed (12%) or work for an agency (0%) 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

The highest proportion of construction workers in the 2018/19 Scotland sample is employed directly by a company (75%). This is a higher proportion than in 2015 and 2012 (70% in 2015 and 65% in 2012). Scottish construction workers with more years' experience are less likely to be employed directly by a company, with just under three-quarters of respondents who have been working in the construction sector for at least 5 years (72%) being directly employed, compared with 85% of those who have worked in the industry for less than a year.

Around a quarter of construction workers in the 2018/19 Scotland sample is self-employed (24%), which is a lower proportion than the UK average (43%).

The proportion of respondents that are self-employed increases to 45% of scaffolders. Just 1% of the sample is accounted for by construction workers who are working for an employment agency, a decrease from the proportions reported in 2015 (5%) and 2012 (8%).

Figure 9: Employment status

Base: All respondents

	SC 2018/19 %	SC 2015 %	SC 2012 %	UK 2018/19 %	Years working in construction			
					<1	1-2	3-4	5+
Employed directly by a company (contractor or sub-contractor)	75	70	65	49	85	91	77	72
Self-employed	24	25	27	43	11	9	21	26
Working for an employment agency	1	5	8	7	4	0	2	1
Working on some other basis	0	<0.5	0	<0.5	0	0	0	0
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>4048</i>	<i>27</i>	<i>22</i>	<i>57</i>	<i>298</i>

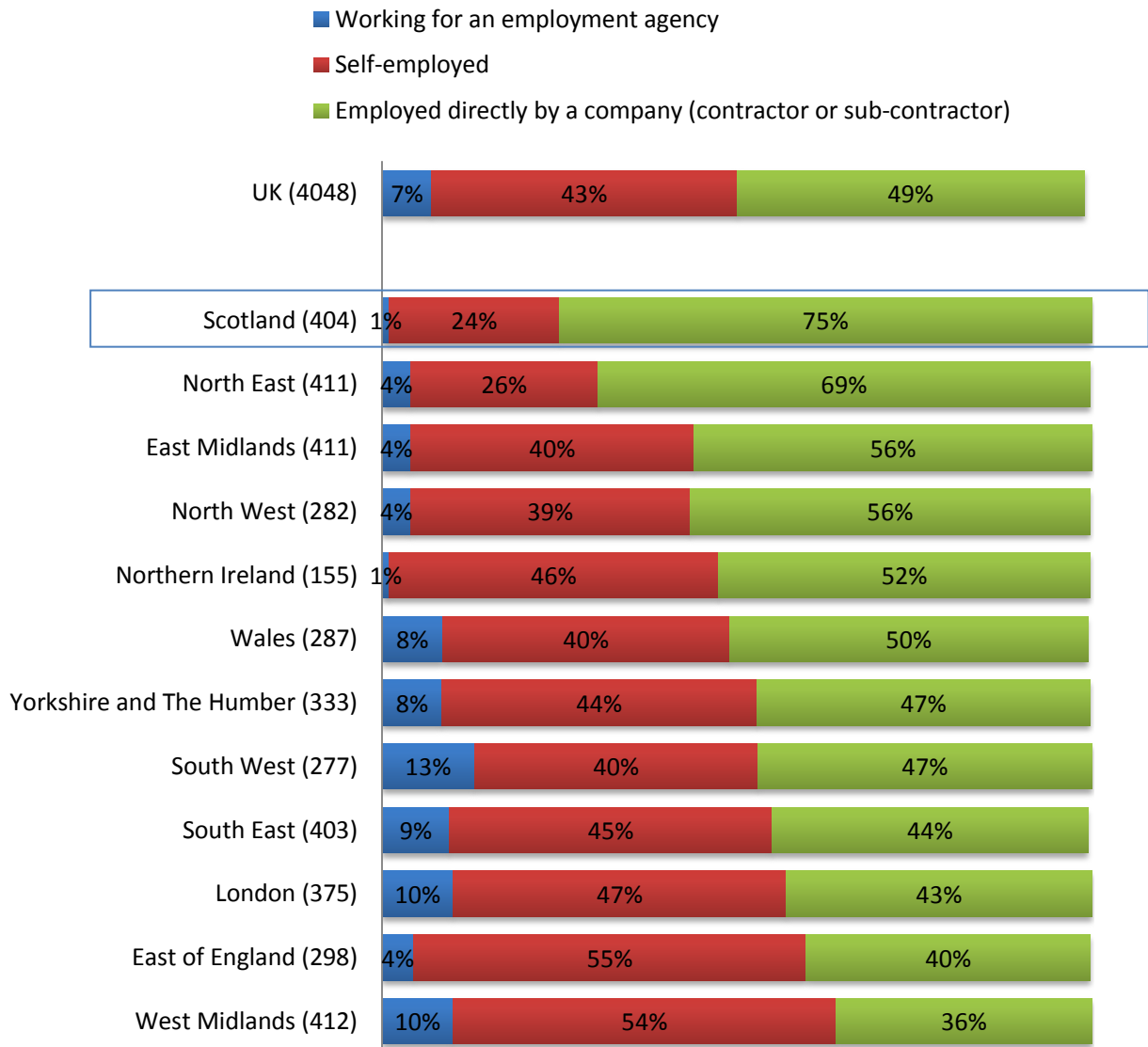
Q20



Scotland has an employment status profile that differs significantly from the UK average. Compared with UK construction workers, those in Scotland are more likely to be directly employed and less likely to be self-employed and agency workers.

Figure 10: Employment status by region/nation

Base: All respondents



Unweighted bases in parentheses Q20



Employment contract basis

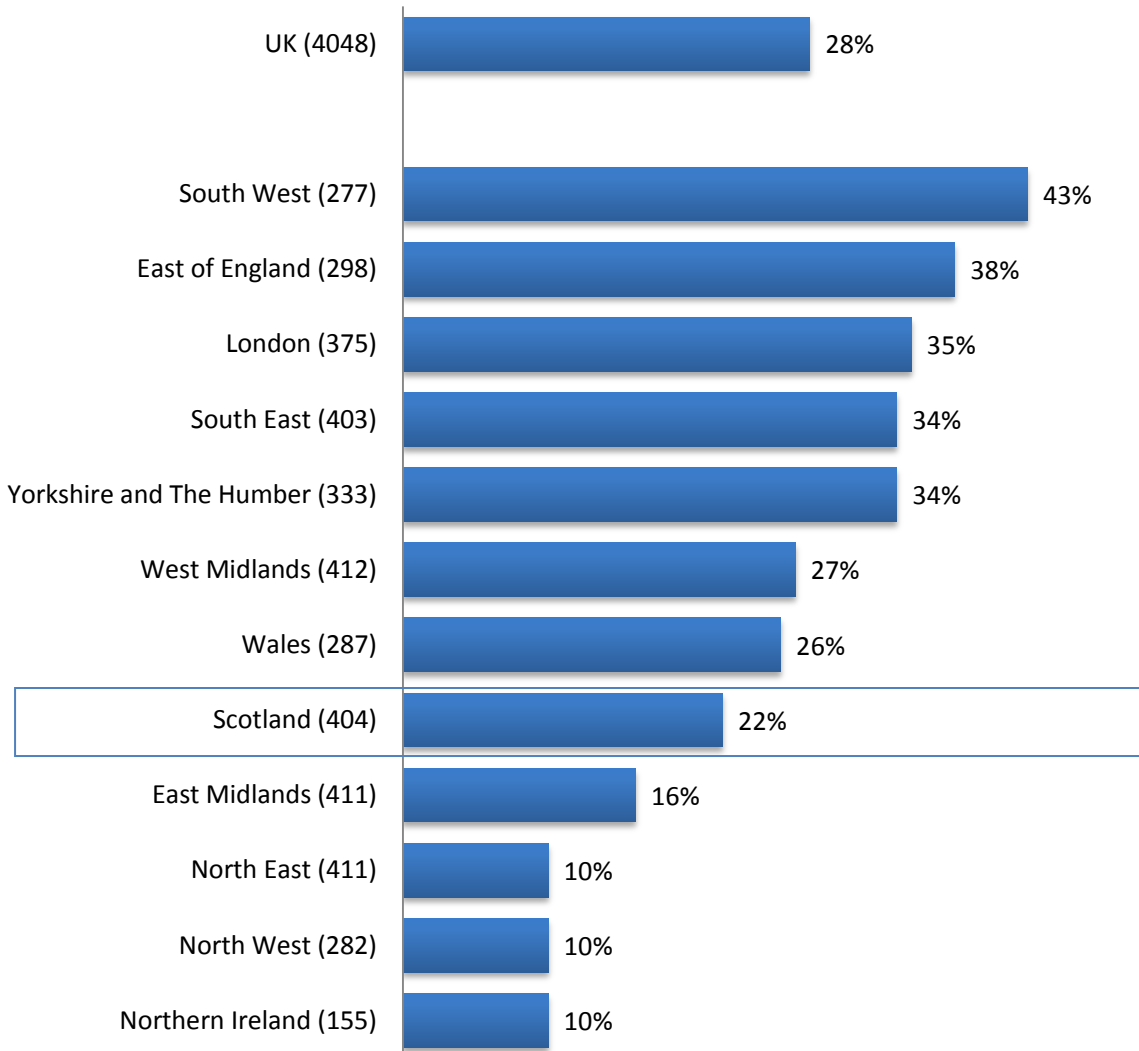
Overall, one in five Scottish construction workers (22%) is employed on a temporary rather than permanent basis (78%). There has been little change from 2015 when one in five (20%) was employed on a temporary basis.

The proportion of workers on temporary contracts is significantly higher amongst those who are self-employed (72%), and significantly lower amongst those employed directly (5%).

Scotland is lower than the UK average 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

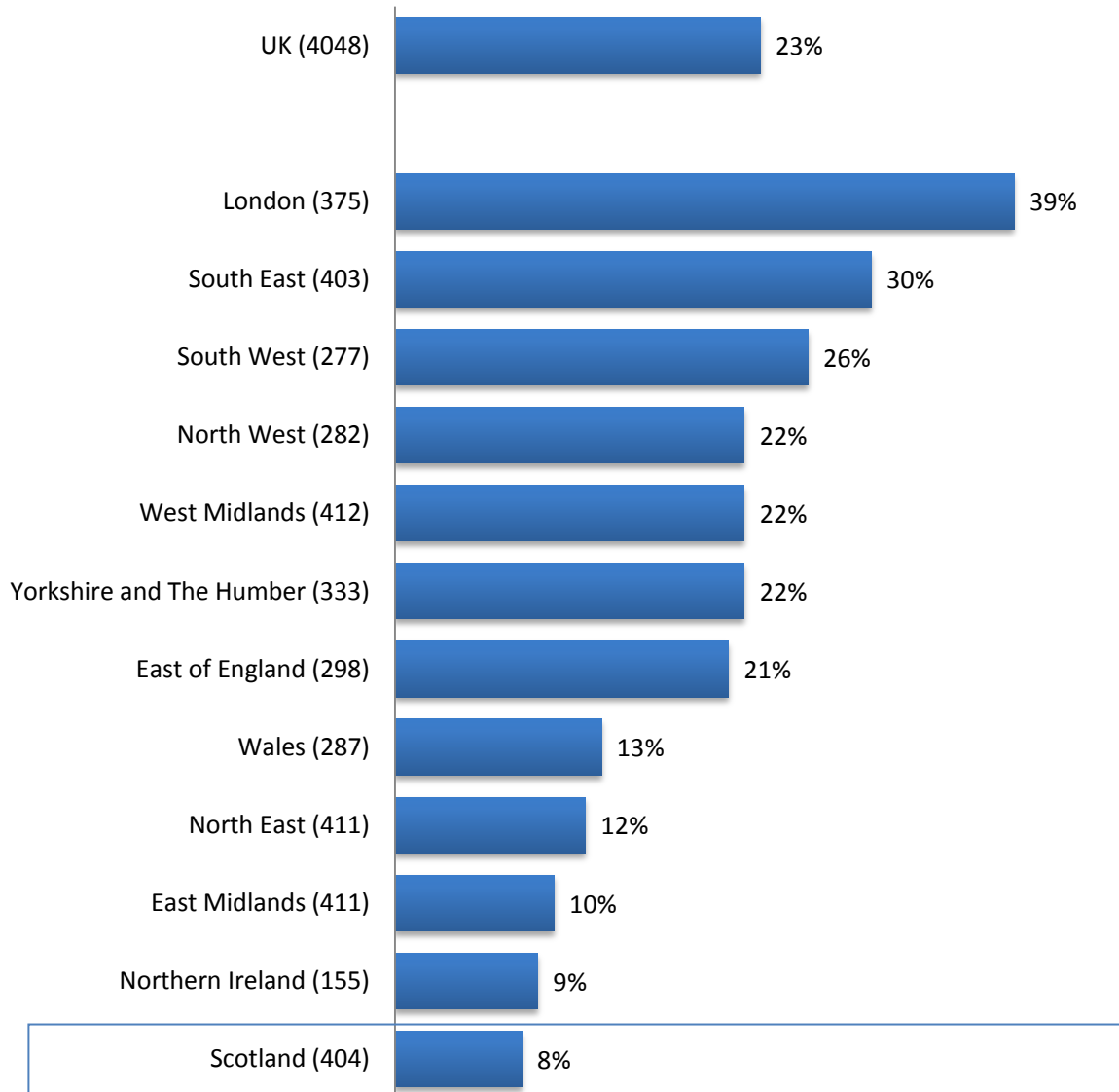


By current trade/role, the proportion working on a temporary basis is higher than average amongst bricklayers and scaffolders (36% and 31% respectively) and lowest amongst plumbers (13%) and labourers/general operatives (12%).

Hours worked

Construction workers in Scotland are most likely to report that they work between 30 and 39 hours per week (56%). This is in contrast to the UK as a whole where a majority work between 40-49 hours (60%). Only a third of Scottish construction workers report that they work between 40-49 hours (35%). Less than one in ten (8%) works more than 50 hours a week, which is lower than the UK average (23%) and lower than every other region.

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

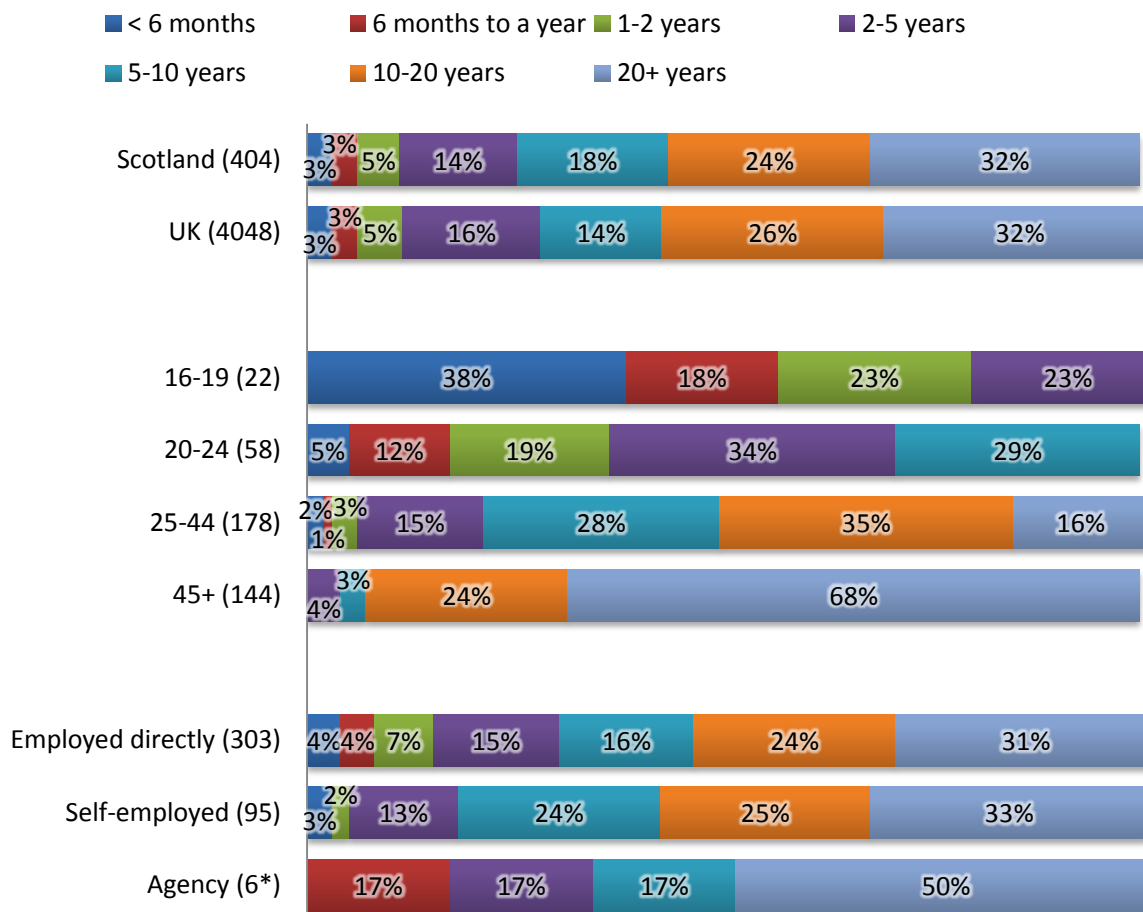
Time in the sector

A third of Scottish construction workers have worked in the construction industry for over 20 years (32%). This is the same as the UK average (32%). In total, 56% have worked in the industry for at least 10 years.

The length of experience in the industry increases with age to the more than two-thirds of workers aged 45 and over in Scotland that have more than 20 years' experience of working in the construction sector (68%).

Figure 13: Years spent working in the construction sector

Base: All respondents Unweighted bases in parentheses *caution: small sample base



Unweighted bases in parentheses Q1



Compared with 2015, Figure 14 shows that, in 2018/19, workers are more likely to have worked in the construction sector for less than 20 years; 32% have 20+ years' experience, compared with 37% in 2015, whilst 44% have 10 or fewer years' experience, compared with 40% in 2015.

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

Base: All respondents

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %
Less than 6 months	3	3	1	3	3
Up to a year	7	6	3	7	6
Up to 2 years	12	10	7	15	12
Up to 5 years	26	22	15	33	28
Up to 10 years	44	40	36	49	42
Up to 20 years	68	63	61	72	68
More than 20 years	32	37	38	28	32
<i>Unweighted bases</i>	404	463	409	240	4048



Pre-construction employment histories

More than four in five workers in Scotland have only ever worked in the construction industry (86% cf. 67% across the UK and 74% within Scotland in 2015). This includes nearly three-quarters who have worked in construction pretty much continuously (70%); 6% for whom this is their first job; and a further 11% that have only ever worked in the construction sector but have had spells out of work.

With the exception of those aged 16-19, the likelihood that workers have worked continuously in construction increases with age, up to over three-quarters of workers aged 40 and over (77%). Younger workers are more likely to say that this is their first job and that they have not worked in any other industry (14% 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

	Scotland 2018/19 %	Scotland 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)	70	57	56	77	60	66	76
I have only worked in construction jobs but have had spells of being out of work	11	5	4	5	9	13	9
My first job was in construction but I've also worked in other sorts of jobs in one or more other industries	3	6	7	0	3	4	1
My first job after full time education was NOT in construction. I moved into the industry after working in other sort(s) of jobs	8	14	23	5	12	10	6
This is my first job. I haven't worked in any other industry.	6	12	7	14	10	2	7
This is my first job in construction but I have worked in other sorts of jobs in one or more other industries	3	4	3	0	5	4	1
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>4048</i>	<i>22</i>	<i>58</i>	<i>178</i>	<i>144</i>

Q2



Less than one in ten 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 (8%). This is a lower proportion to that reported in 2015 (14%).

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. For around two in five cases, respondents had previously worked in wholesale and retail trade (41%) while a quarter had previously worked in manufacturing (26%). In both cases, this is an increase from 2015 (21% and 15% respectively).

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

Base: Where first job was not in construction

	Scotland 2018/19 %	Scotland 2015 %	UK 2018/19 %
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	41	21	19
C – Manufacturing	26	15	45
B – Mining and quarrying	12	4	6
R- Arts, Entertainment and Recreation	9	5	*
<i>Unweighted bases</i>	34	85	862

Q3

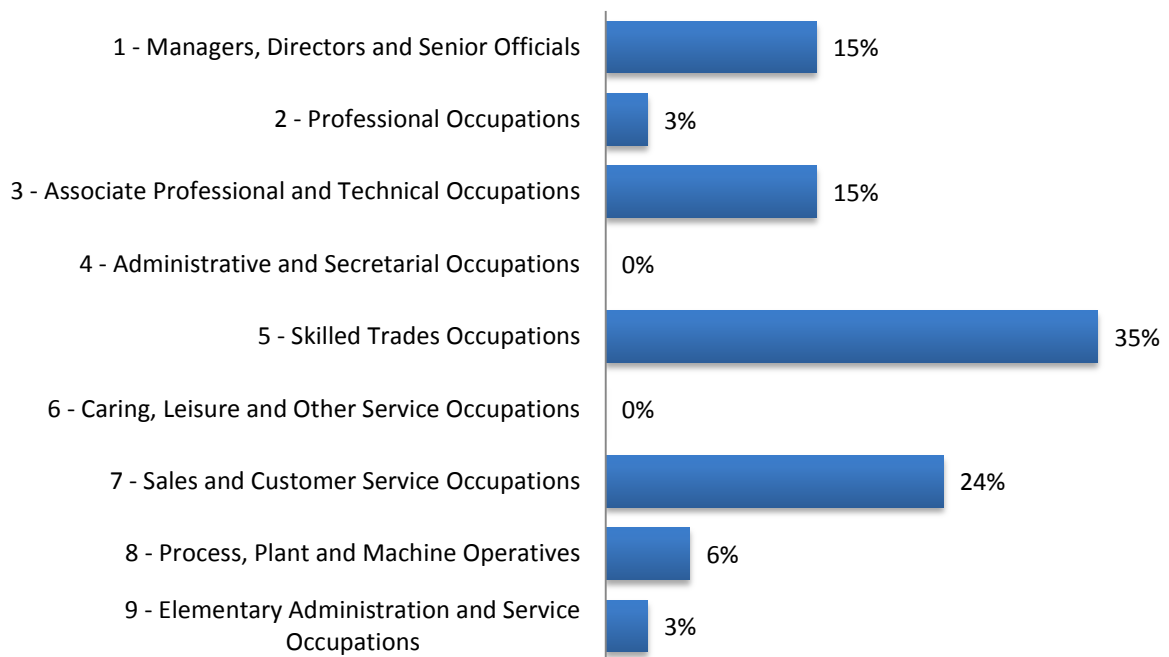


In terms of the job roles that Scottish construction workers have undertaken in other sectors, more than a third had worked in skilled trades occupations (35% cf. 27% across the UK), around a quarter had worked in sales and customer service operations (24% cf. 3% across the UK), 1 in 7 worked as managers/directors or senior officials, and a further 1 in 7 worked in professional and technical occupations.

Just 6% of workers that had worked in other sectors had worked as process, plant and machine operatives, while slightly fewer had worked as professional occupations (3%) or within elementary administrative and service occupations (3%).

Figure 17: Job roles undertaken in other sectors

Base: Where first job was not in construction



Unweighted base = 34 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, just one in ten of all construction workers in Scotland have worked in more than one construction trade or occupation whilst working in the construction industry (10%) which is a lower proportion than in 2015 and the UK average in 2018/19 (26% and 36% respectively).

The proportion of workers that have had more than one role increases with age (to 13% amongst those aged 45+ cf. 0% of those aged 16 to 19 years).

Workers in a supervisory or management role are more likely to have had more than one role or occupation within the construction sector (28% cf. 6% of workers not in supervisory or management roles).

As in 2015, there are also variations by other current job roles. Amongst these, scaffolders (17%) are most likely to have had more than one role/occupation within construction. Plumbers (0%) are least likely to have had any other trade within the construction sector. 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		
	SC 2018/19 %	UK 2018/19 %		SC 2018/19 %	UK 2018/19 %
Scaffolder (29)	17	34	Labourer /Gen. Op. (109)	5	29
			Bricklayer (55)	5	24
			Carpenter/Joiner (56)	2	22
			Plumber (24)	0	26

Unweighted bases for 2018/19 Scotland in parentheses

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 (33%) or a carpenter/joiner (31%), while 1 in 10 workers have previously worked as a plant/machine operative (10%).

Figure 19: Previous occupations/trades in the construction sector

Base: Workers that have switched occupations within construction

Occupation	SC 2018/19	UK 2018/19
	%	%
Labourer/General operative	33	34
Carpenter/joiner	31	19
Plant/machine operative (e.g. Fork lift/JCB)	10	10
Banksman/Banksperson	8	6
Roofer	5	8
Plasterer	5	8
Dryliner	5	8
Site manager	5	5
Electrician	5	5
Painter/decorator	3	7
Bricklayer	3	12
Floorer	3	4
Pipe fitter	3	4
Scaffolder	3	4
Mechanical fitter	3	1
Plumber	3	5
Welder	3	2
Other	5	7
<i>Unweighted base</i>	<i>39</i>	<i>1328</i>

Q7



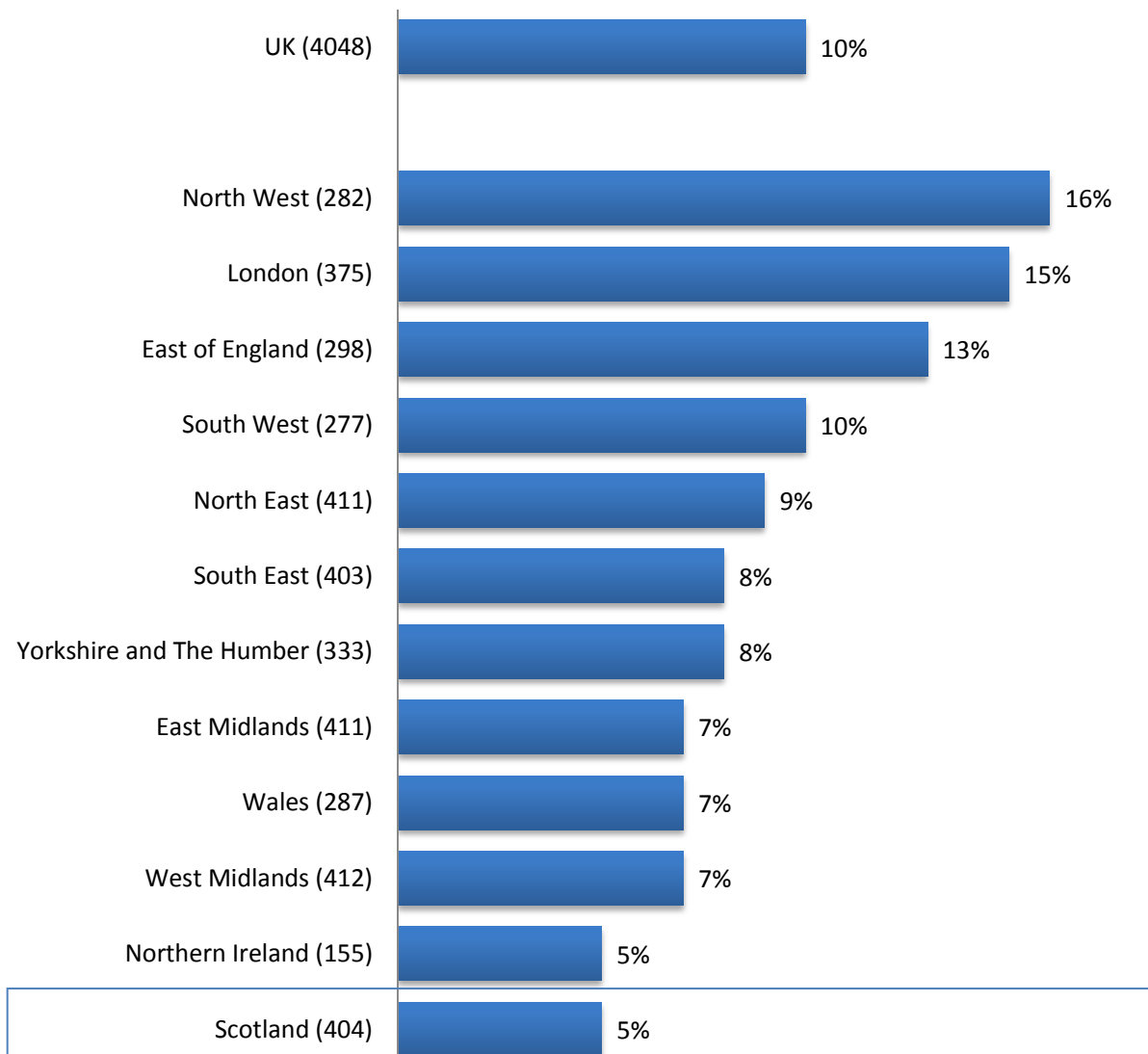
Future career plans

Thinking about their future plans in construction, 8 in 10 construction workers in Scotland would like to carry on in the same trade or occupation (83%); 1 in 20 would like to change their trade/occupation (5%); and a further 2% would like to leave construction. The remainder (9%) are not sure.

Compared with the UK average, Scottish construction workers are slightly more likely to want to carry on as they are (80% across the UK) and slightly 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



Construction workers aged 20 to 24 years are more likely than those in other age groups to want to change their trade or occupation (9%). Workers aged 25-44 or 45 or older are more likely than average to want to carry on as they are (87% and 84% respectively).

By current trade/occupation those working as plumbers (96%) and carpenters/joiners (89%) are most likely to want to carry on as they are.

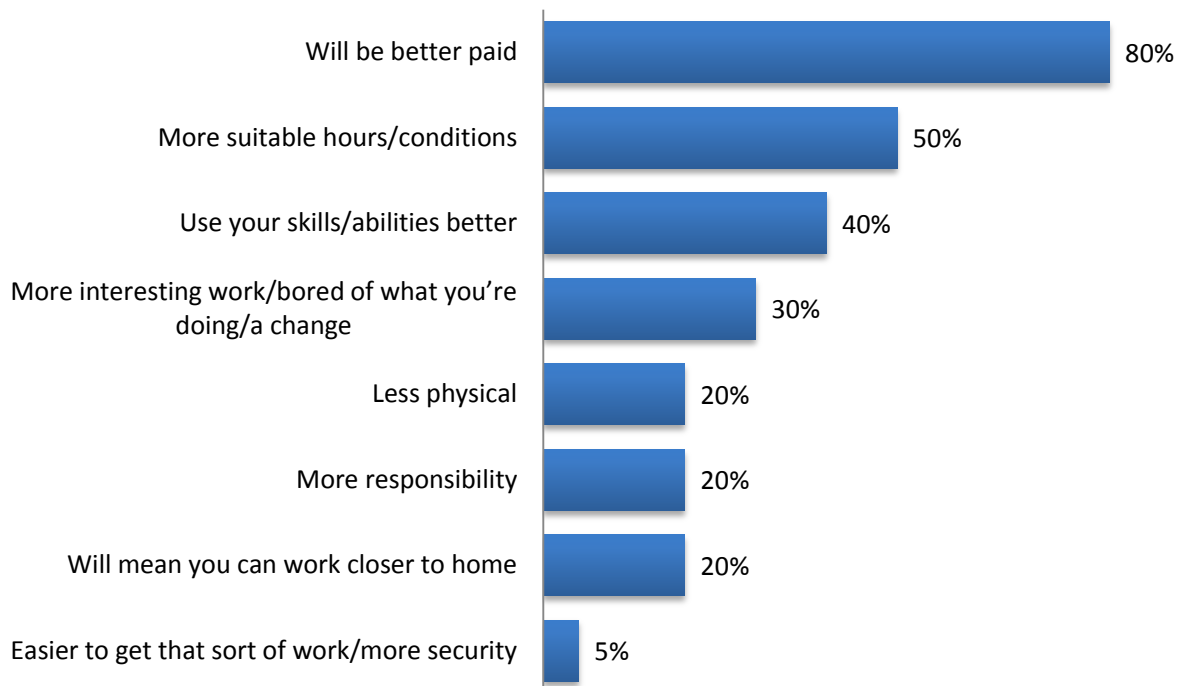
Amongst those who would like to change trade or occupation, a wide range of alternative trades/occupations are mentioned. However, the highest proportion overall would like to be a site manager (50%).

In 9 in 10 cases where construction workers in Scotland would like to change trade or occupation, they believe they will require further training or qualifications in order to do this (90%). This compares to a lower proportion in 2015 (70%) and across the UK in 2018/19 (87%).

The most popular reason for wanting to change trade or occupation is the perception amongst workers that they will be better paid (80%) while half want a less physical occupation (50%) and slightly fewer (40%) want to use their skills/abilities better. Just under a third (30%) wants more interesting work (or they are bored of what they are doing).

Figure 21: Reasons for wanting to change trade/occupation

Base: Where workers would like to change trade/occupation



Unweighted base = 20 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 1% of all construction workers in the Scotland (2% across the UK) say they do not hold any card and 1% are unsure. In total, 99% 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 Scotland are amongst those most likely to hold skill certificates or cards following an increase in this respect in Scotland from 2015.

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 lower amongst younger workers (95% amongst 16 to 19 year olds) although there has been a considerable improvement from 2015. Furthermore, Scottish construction workers aged 16 to 19 are more likely to hold a skill card or certificate compared to the UK average (85%).

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

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

		Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	Scotland 2007 %	UK 2018/19 %
Total (404)		99	88	98	59	97
Age	16 to 19 years (22)	95	56	0	23	85
	20 to 24 years (58)	97	93	98	41	97
	25 to 44 years (178)	99	94	98	67	98
	45+ years (144)	99	86	99	66	98
Length of time in construction	<1 year in construction (27)	100	71	0	30	89
	1 to 2 years (22)	95	90	0	40	97
	2 to 5 years (57)	93	90	100	47	96
	5+ years (298)	100	89	98	67	98
Contract-type	Employed directly (303)	98	86	98	62	96
	Self- employed (95)	99	95	99	47	98
	Agency (6*)	100	91	97	-	97
<i>Unweighted bases for 2018/19 Scotland 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 (92%), an increase on 2015 (84%) and higher than the UK average (85%).

Figure 24: Type of skill card/certificate held

Base: All respondents

	Scotland 2018/19 %	Scotland 2015 %	Scotland 2012 %	UK 2018/19 %
CSCS (Construction Skills Certification Scheme) (GB)	92	84	90	85
CSR (Construction Skills Register) (NI)	3	1		3
CISRS (Construction Industry Scaffolders Record Scheme)	3	3	3	3
CPCS (Construction Plant Competence Scheme)	2	7	19	11
Other	1	5	11	4
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>409</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:

- Scaffolders (66%) are less likely to hold CSCS (Construction Skills Certification Scheme);
- Over a third of scaffolders (34%) hold CISRS (Construction Industry Scaffolders Record Scheme). At least 90% labourers/general operatives (95%), bricklayers (93%) and plumbers (92%) hold CSCS (Construction Skills Certification Scheme (GB)).

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 Scotland, 6% of CSCS card holders have Red Trainee cards and 5% have Red Experienced worker cards; over a quarter of CSCS (27%) card holders have Green cards and/or Blue cards (30%). One in five CSCS card holders has Gold cards for advanced craft/skilled workers (22%) and 5% have the Gold card for supervisors.



Figure 25: Colour of CSCS/CSR cards held

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

	CSCS %		CSR* %
Red - Trainee	6	Red - Apprenticeship/Trainee	0
Red - Experienced worker card	5	Red - Trained Plant Operator	0
Green - construction site operative card for general site workers	27	Green - Construction Operative (for general site workers)	18
Blue - skilled	30	Blue - Operative/ Craft	64
Gold - supervisor card	5	Gold - Craft/Supervisor Card	18
Gold - Advanced craft/skilled worker	22	Gold - Advanced Scaffolder	0
Black - contracts manager card	1	Black - Senior Managers Card	0
Academically Qualified Persons Card	1		
Apprentice Card	1		
Other	<0.5	Other	0
Unsure	1	Unsure	0
<i>Unweighted bases</i>	<i>371</i>		<i>11</i>

Q13/Q14

Younger workers are more likely to hold Red Trainee cards (65% of 16 to 19 year olds with a CSCS card), while workers aged 25-44 are more likely to hold Blue cards (36%). Workers currently employed by an agency* are more likely to hold Green cards (60%) compared with those employed directly or self-employed (27% and 23% respectively).

* Caution: small sample base

Card colours also vary significantly according to current occupation/trade, as Figure 26 summarises. One significant difference is that labourers/general operatives are most likely to hold Green cards (63%).

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

Base: Where currently hold a CSCS card *caution: small sample base

	<i>Unweighted bases</i>	Red: Trainee %	Red: Experienced worker card %	Green %	Blue %	Gold %	Black %
Labourer / Gen. Op.	104	9	13	63	13	2	0
Carpenter / Joiner	50	10	0	8	26	54	0
Bricklayer	51	2	2	12	37	45	0
Plumber	22	5	5	5	14	68	0
Scaffolder	19	5	0	32	47	16	0



Construction qualifications held

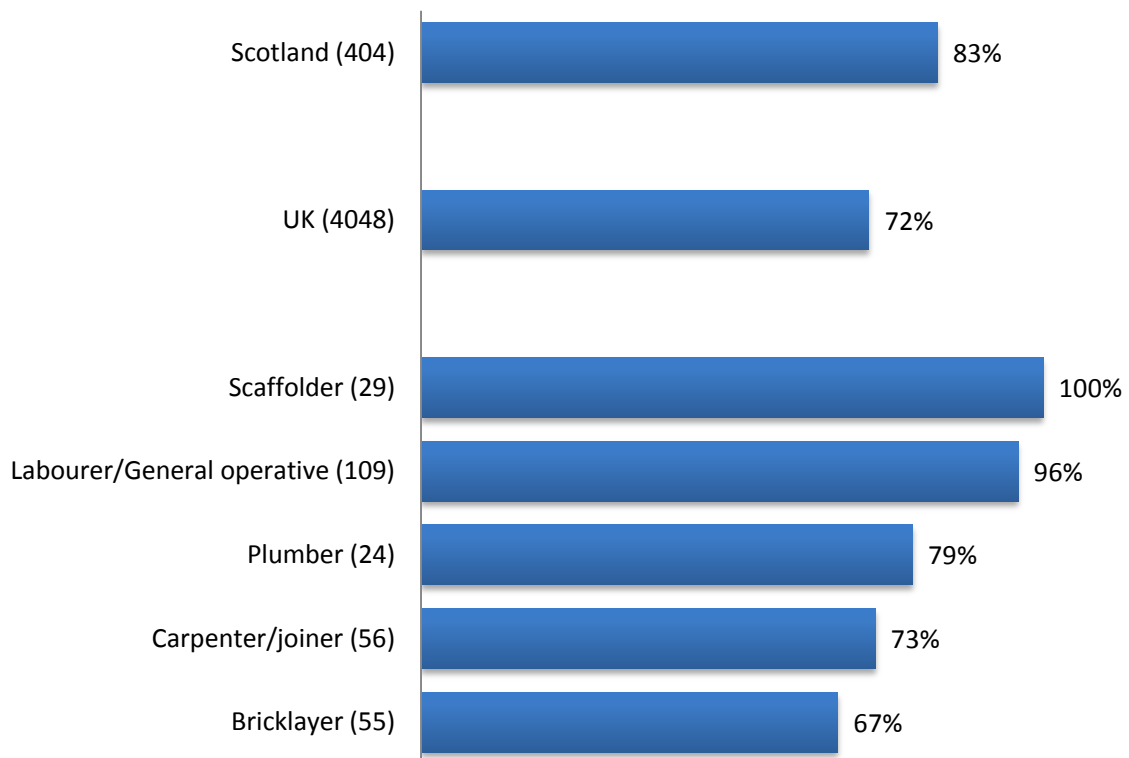
All workers were asked about the construction-specific qualifications they held after leaving full-time education and starting their first job in construction.

Overall, 83% of construction workers in Scotland say they had no formal qualifications related to construction when they first started working in the construction industry. This compares with 77% in 2015 and 72% of all UK construction workers in 2018/19.

By current trade/occupation within Scotland, the proportion of workers that started their construction careers with no formal qualifications is highest amongst scaffolders (100%) and labourers/general operatives (96%) and lowest among bricklayers (67%).

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 *caution: small sample base



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, just over three-quarters of Scottish construction workers reported holding some sort of construction-related qualification at the time of interview (75%), compared with a lower proportion in 2015 (57%). Compared with the UK average, Scottish construction workers were more 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 Scottish construction workers that hold any qualifications is lower than average amongst those who have worked in construction for less than a year (22% compared to UK average of 34%).

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

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

		SC 2018/19	SC 2015	SC 2012	SC 2007	UK
		%	%	%	%	2018/19
		%				%
Total (404)		75	57	45	53	72
Age	16 to 19 years (22)	50	52	-	18	52
	20 to 24 years (58)	55	71	40	52	63
	25 to 44 years (178)	78	62	46	63	74
	45+ years (144)	83	45	48	47	76
Length of time in construction	<1 year (27)	22	24	0	0	34
	1 to 2 years (22)	50	39	0	41	52
	2 to 5 years (57)	61	64	34	41	63
	5+ years (298)	84	60	50	61	79
Current contract type	Employed directly (303)	73	58	46	53	75
	Self-employed (95)	82	58	43	63	73
	Agency (6*)	67	29	45	0	49

Unweighted bases for 2018/19 Scotland in parentheses

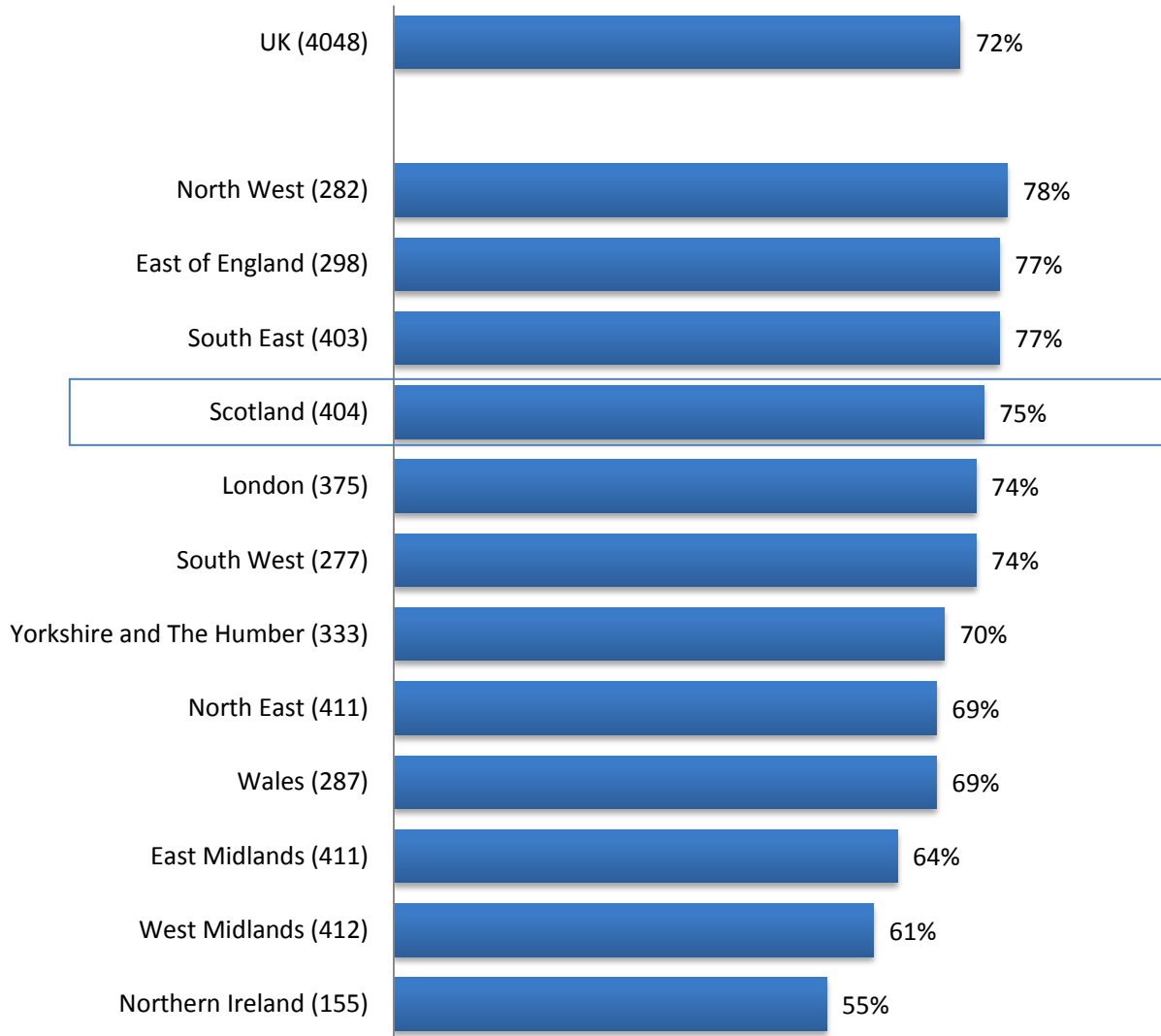
Q15/Q16



Scotland is just above the UK average in terms of the propensity of its construction workforce 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 qualifications also varies significantly by current job role. Bricklayers (98%), carpenters/joiners (96%), plumbers (92%) and scaffolders (88%) are more likely than average to hold qualifications. Less than a third of labourers/general operatives (28%) 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 (58%), which is higher than the proportion reported in 2015 in Scotland (52%) and the same as the UK 2018/19 average (58%). A quarter of Scottish construction workers with qualifications hold an apprenticeship (25%), more than in 2015 (21%) and the UK 2018/19 average (6%). Nearly one in six construction workers in Scotland with qualifications hold a City and Guilds qualification (15%), a similar proportion to the UK 2018/19 average (14%).

Figure 30: Main type of qualification held

Base: Workers with qualifications (valid responses)

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %
NVQ/SVQ	58	52	67	55	58
City & Guilds	15	26	17	27	14
Apprenticeship	25	21	1	3	6
HNC/HND/BTEC Higher	4	5	3	2	6
Degree	3	2	1	4	7
Other	12	11	2	-	24
<i>Unweighted bases</i>	<i>215</i>	<i>239</i>	<i>133</i>	<i>114</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, just 2% of construction workers in Scotland believe they would benefit from some form of training in basic skills. This is a smaller proportion than the UK 2018/19 average (11%) and a continued decline from 2015 (9%) and 2012 (25%).

In terms of the type of training required, there is an almost even split across reading, writing, and maths, with less than 1% wanting training in speaking English, as Figure 31 summarises.

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

Base: All respondents

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %
ANY	2	9	25	5	11
Reading	1	5	15	3	5
Writing	1	3	14	1	5
Speaking English	*	3	11	3	6
Maths	1	2	14	1	5
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>240</i>	<i>4048</i>

Q37



Current study for additional construction qualifications

Overall, 11% of all construction workers in Scotland are currently working towards a formal qualification relevant to the construction industry (excluding supervisory or managerial qualifications). This compares with 11% 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 (33% of 16 to 24 year olds). Furthermore, those who have worked in construction for 5 years or more are least likely to be currently working towards qualifications (4%), compared to less experienced workers (33% those with less than 1 year). Workers employed directly (13%) are also more likely than those who are self-employed (5%) or working through an agency (0%) to be currently working towards a qualification. Of those who have no qualifications, 16% are currently working towards one, an increase from 2015 (8%). Figure 32 summarises these findings.

Figure 32: Proportion working towards additional construction qualifications

Base: All respondents

*Caution: small sample base

		Scotland 2018/19	Scotland 2015	Scotland 2012	Scotland 2007	UK 2018/19
		%	%	%	%	%
Total (404)		11	11	6	16	15
Age	16 to 19 years (22)	59	59	0	50	55
	20 to 24 years (58)	22	21	12	38	24
	25 to 44 years (178)	8	7	6	8	14
	45+ years (144)	2	4			6
Length of time in construction	<1 year (27)	33	29	0	30	38
	1 to 2 years (22)	32	25	0	15	31
	2 to 5 years (57)	26	33	3	47	25
	5+ years (298)	4	6	7	8	9
Contract type	Employed directly (303)	13	14	N/A	N/A	20
	Self- employed (95)	5	4	N/A	N/A	9
	Agency (6*)	0	0	N/A	N/A	11
Highest qualification level	None (102)	16	8	N/A	N/A	16
	Level 1 (3*)	33	18	N/A	N/A	27
	Level 2 (67)	1	17	N/A	N/A	12
	Level 3 (66)	0	11	N/A	N/A	14
	Level 4+ (9*)	33	14	N/A	N/A	21

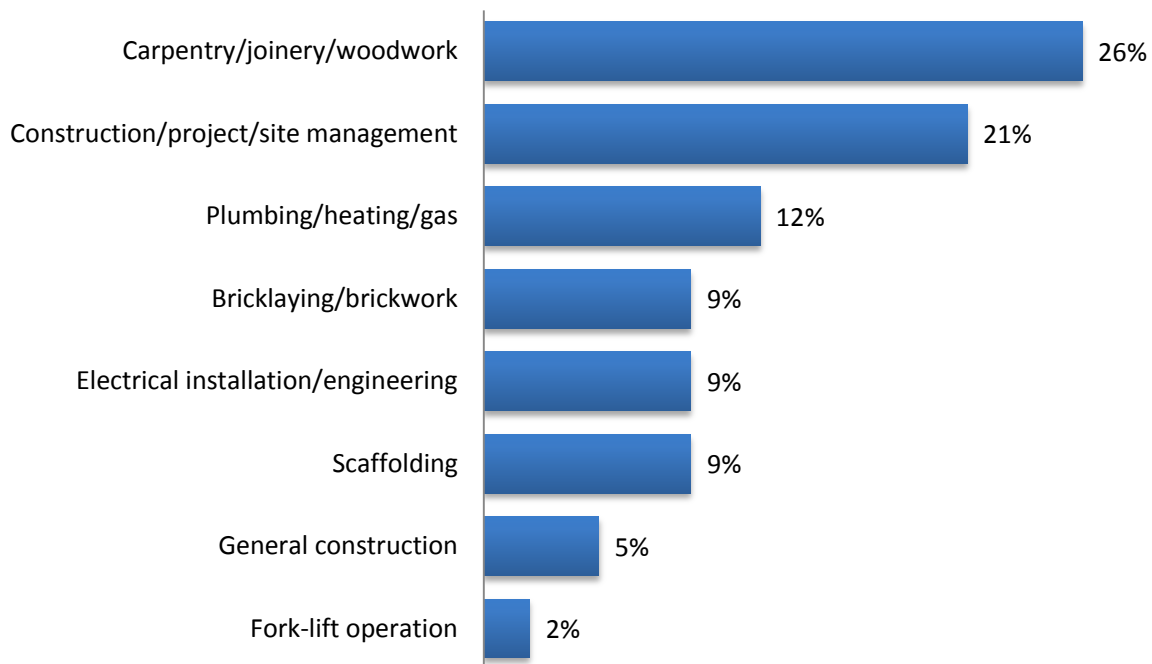
Unweighted bases for 2018/19 Scotland in parentheses

Q18



Of those who are currently studying for a qualification the most popular type of qualification is an NVQ/SVQ (51%). In terms of the subject of the qualifications being worked towards, carpentry/joinery/woodwork (26%) followed by construction/project/site management (21%) and plumbing/heating/gas (12%) are most popular, as Figure 33 illustrates.

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



Unweighted base = 43 Q19

Supervisory and managerial qualifications and training

As reported earlier, just 15% of all construction workers in Scotland perform a supervisory or management role at their site. Amongst those who do not currently perform supervisory/management roles, less than 1 in 10 want to become a supervisor or manager in the future but have not done it before (8%) and a further 2% want to be a supervisor/manager and have done it before. Over a third of all workers not currently managers/supervisors are unsure as to whether they'd like to be one in the future (36%). Over half are certain that they do not want to be (54%).

The proportion of Scottish construction workers who would like to perform a supervisory role in the future is lower than the UK average, made up of 24% of construction workers who have not performed a supervisory role but would like to, and a further 6% who have done it before and would like to do it more in the future. This is primarily due to a larger proportion of construction workers in Scotland stating that they are unsure (36%) compared to the UK average (20%).



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: small sample base

		Unweighted bases	Yes, but have not done it before %	Yes and have done it before %	No %	Maybe/depends %
Scotland		332	8	2	54	36
UK		2824	24	6	51	20
Age	16 to 19 years	22	18	0	27	55
	20 to 24 years	55	11	0	40	49
	25 to 44 years	147	10	3	50	37
	45+ years	106	2	0	71	25
Length of time inc construction	<1 year	26	4	0	42	54
	1 to 2 years	21	5	0	57	38
	3 to 4 years	53	13	2	43	42
	5+ years	232	7	3	57	32
Contract type	Employed directly	248	9	2	53	35
	Self-employed	78	3	3	55	40
	Agency*	6	17	0	83	0
Highest qualification level	No Qualifications	97	2	0	63	35
	Level 1*	3	33	0	0	67
	Level 2	59	8	0	51	41
	Level 3	52	15	4	50	31
	Level 4+*	6	33	17	0	50

Q9

The likelihood that workers want to be supervisors/managers also diminishes with age, with nearly three-quarters of construction workers in Scotland aged 45 or older stating that they do not want to be a supervisor in the future (71%). This compares to around a quarter of construction workers aged 16 to 19 years (27%).

One in six construction workers in Scotland (16%; 34% across the UK) and over four-fifths of those who have had some form of supervisory or management responsibilities (84% cf. 73% in 2015, 80% in 2012 and 81% across the UK in 2018/19) have received any formal training designed to improve managerial or supervisory knowledge or skills.

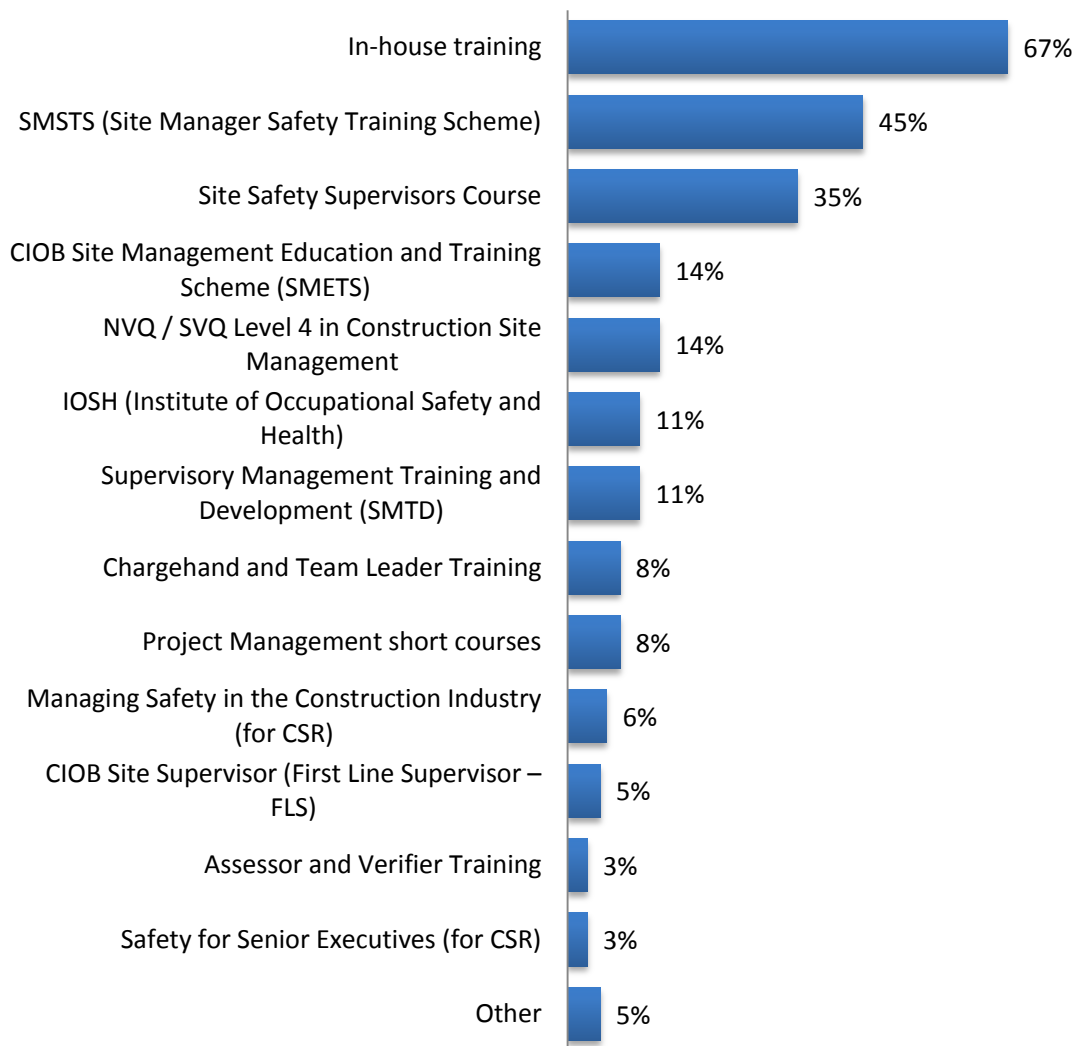
The proportion that has undertaken any managerial or supervisory training is higher amongst those that have worked in construction for at least 5 years than amongst those that have worked in the sector for less time (21%, compared with 4%). Construction workers employed directly are more than twice as likely as self-employed workers to have received formal training in this area (19%, compared with 8%). The current role most likely to have



undertaken any managerial or supervisory training are carpenters/joiners and plumbers (both 13%).

In terms of the types of supervisory/managerial training undertaken, the proportions mentioning each type are summarised in Figure 35. In-house training is the most common type of managerial/supervisory training undertaken in Scotland (67%), with nearly half stating that they have undertaken SMSTS (45%). Over a third mentioned undertaking site safety supervisory course (35%). These were also the three most frequently mentioned in 2015.

Figure 35: Types of managerial/supervisory training undertaken
Base: Where received formal training designed to improve managerial or supervisory knowledge or skills



Unweighted base = 66 Q11



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 36 below.

As in previous surveys, the vast majority of construction workers in Scotland (the percentage can be rounded to 100%, but this does not include all workers surveyed) has a construction-related qualification and/or skills card/certificate (or were working towards a qualification at the point of interview).

Just over one in five of the workforce (21%) holds a skill card/certificate, but have no other construction qualification. This is a reduction from 2015 (31%) and 2012 (66%) and remains close to the UK average (22%). A tenth (11%) are currently working towards a qualification.

Figure 36: Qualification status summary

Base: All respondents

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %
Holds a formal construction qualification or a skills card/certificate or working towards a qualification	100	95	99	77	99
Holds a formal construction qualification or a skills card/certificate	100	94	98	73	98
Holds a skills card/certificate	99	89	98	59	97
Holds a skills card/certification but no other qualification	21	31	66	26	22
Working towards a qualification	11	11	6	16	15
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>240</i>	<i>4048</i>



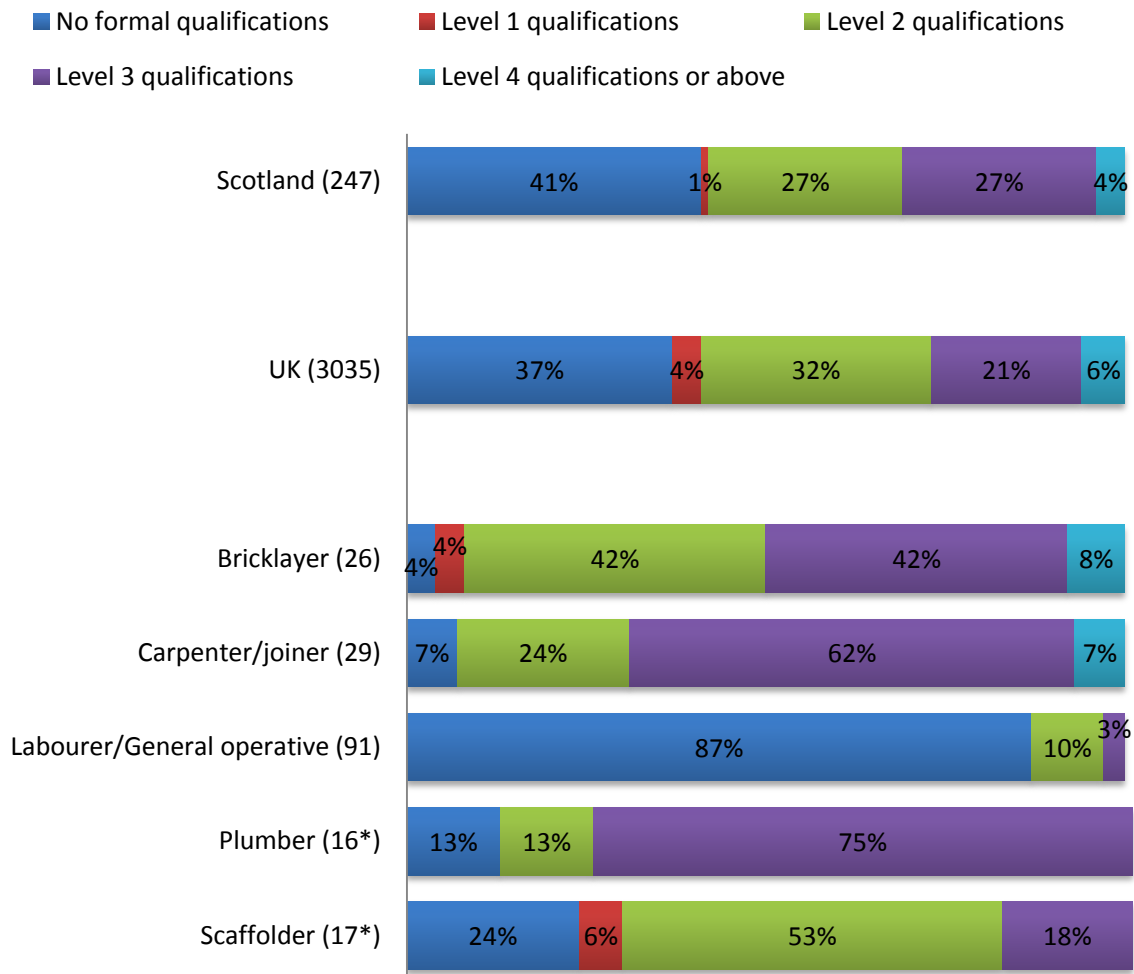
Based on all questions relating to qualifications it is possible to calculate each worker's highest qualification level. Figure 37 summarises construction workers' highest level of qualification, overall and by occupation, based on where the information provided enabled a level to be assigned (39% of all construction workers in Scotland did not provide sufficient information).

Overall, more than half of construction workers in Scotland providing a valid response have qualifications equivalent to Level 2 or above (57%, cf. 52% in 2015; 59% across the UK in 2018/19).

By occupation, plumbers (providing a response) are most likely to hold the highest level of qualifications; three quarters hold qualifications at Level 3 or above (75%). This is followed by carpenters/joiners (69%) and bricklayers (50%) where at least half have a Level 3 qualification or higher. Labourers/general operatives are the least likely to have a qualification with nearly nine in ten stating they have no formal qualification (87%); just 3% stated they had a qualification at Level 3 or higher.

Figure 37: Current qualification level, by occupation

*Base: All respondents who provided a valid response *Caution: small sample base*



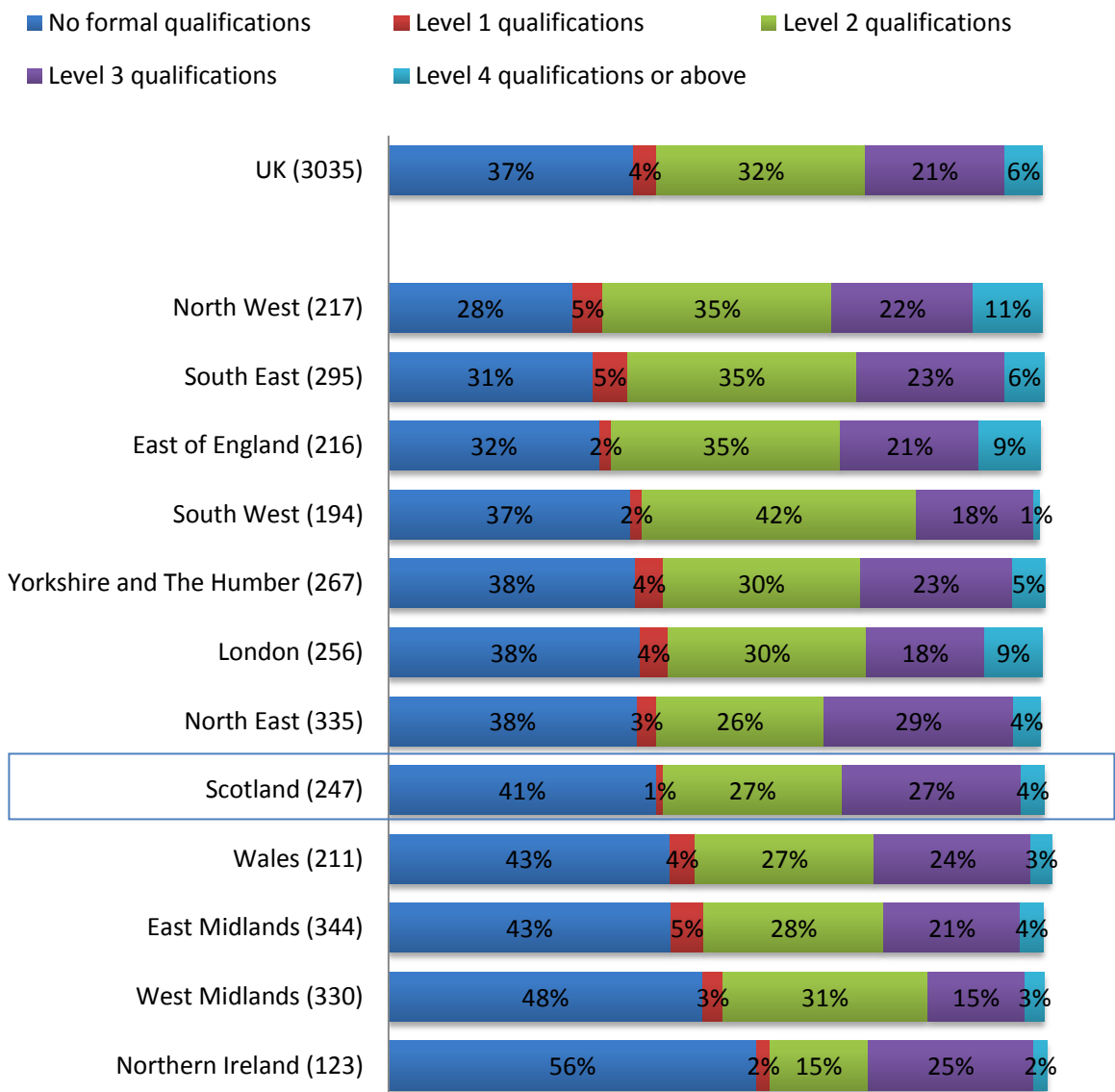
Unweighted bases in parentheses Q15/Q16



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 38, which highlights that the construction workforce in Scotland is about average for the UK.

Figure 38: Current qualification level, by region/nation

Base: All respondents who provided a valid response



Unweighted bases in parentheses

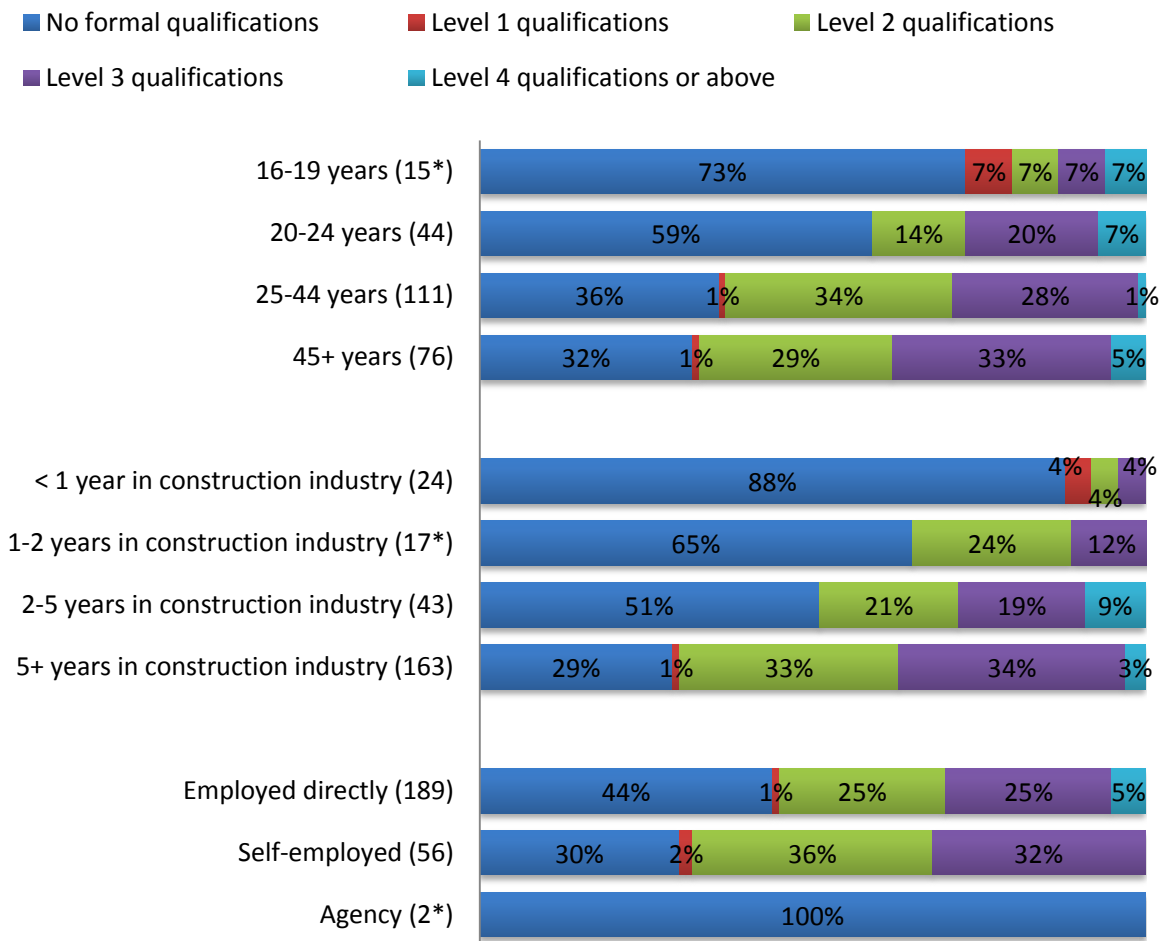


Looking at other sub-groups of construction workers, workers that have worked in construction for 5+ years are more likely than those having spent less time in the industry to have qualifications at Level 3 or 4+ (37%, compared with 18% that have less than 5 years experience).

In terms of contract type, there is little difference between workers directly employed by a company compared with workers who are self-employed; three in ten workers employed directly have qualifications equivalent to level 3 or above (30%), just slightly lower than the proportion for self-employed workers (32%). Figure 39 illustrates these variances and levels of qualifications held by other key variables.

Figure 39: 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 Scotland, as across the UK as a whole, the most likely reason for working in a region/nation is because their employer sent them there (58%), although the fact that they grew up there/have always lived there is also mentioned by nearly half of workers (45%), similar to the UK average.

Figure 40: Reasons for choosing to work in current location

Base: All respondents

	SC 2018/19 %	SC 2015 %	UK 2018/19 %		SC 2012 %
Employer sent you here	58	22	51	Employer sent me	36
You grew up here/have always lived here	45	72	43	Family	35
Family reasons	2	5	5		
Came to the area to take up this or another job	1	3	3	More regular opportunities	8
There are more jobs available in this area	2	4	5	More jobs here	17
Construction work is better paid in this area	2	2	3	Better paid jobs	4
Wanted to move to the area because you like it or feel it offers opportunities for better quality of life	0	1	2	Prefer living here	11
Better promotional prospects in this area	*	1	1	More chance of promotion	1
<i>Unweighted bases</i>	411	463	4048		409

Q28

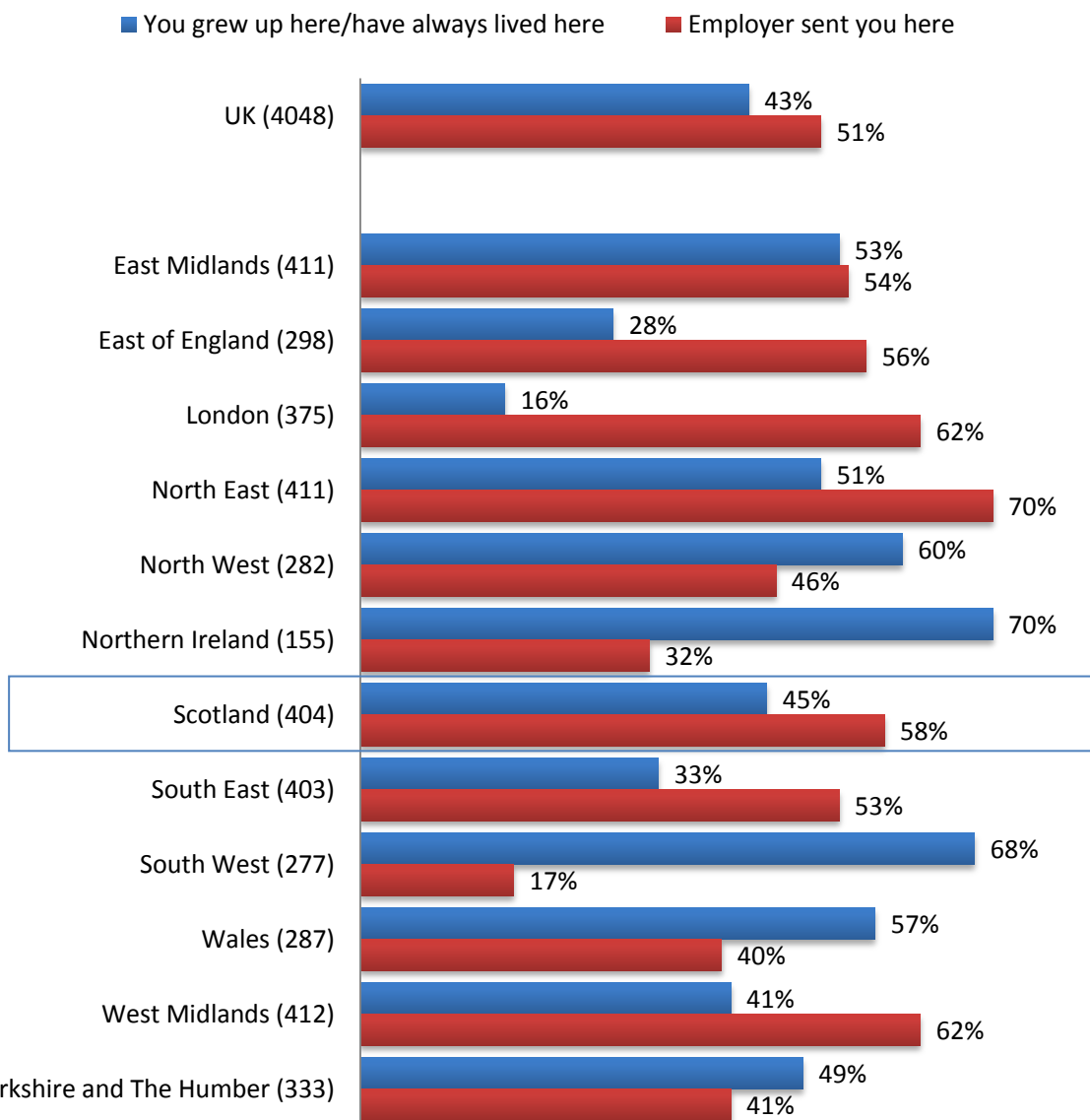


Three-quarters of those aged 16-19 state that they work in their current location because that's where they have always lived/grew up (73%), while 25-44 year olds are significantly less likely than average to state that this is the case (38%), and significantly more likely to say that their employer sent them (65%).

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 Scotland are more likely than the UK average to say their employer sent them.

Figure 41: Top two reasons for deciding to work in their current region/nation, by region/nation

Base: All respondents



Unweighted bases in parentheses Q28



Around three-quarters of all workers in Scotland have worked there for their entire construction career (76%), compared with a lower proportion in 2015 (63%) and 2012 (49%). With a further 20% that have remained in the nation most of the time, this means the overwhelming majority of all workers have remained in Scotland for all or most of the time (96% cf. 77% across the UK)

Figure 42: Proportion of construction workers' career worked in current region/nation

Base: All respondents

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %
All of your time	76	63	49	68	44
Most of it	20	26	29	18	33
Around half your time	2	4	8	5	9
A small proportion of your time	1	4	9	6	10
Only on this job (this is the first site you've been to in this region/nation)	<0.5	2	2	2	2
Don't know	1	<0.5	3	<0.5	1
<i>Unweighted bases</i>	404	463	409	240	4048

Q26/Q27

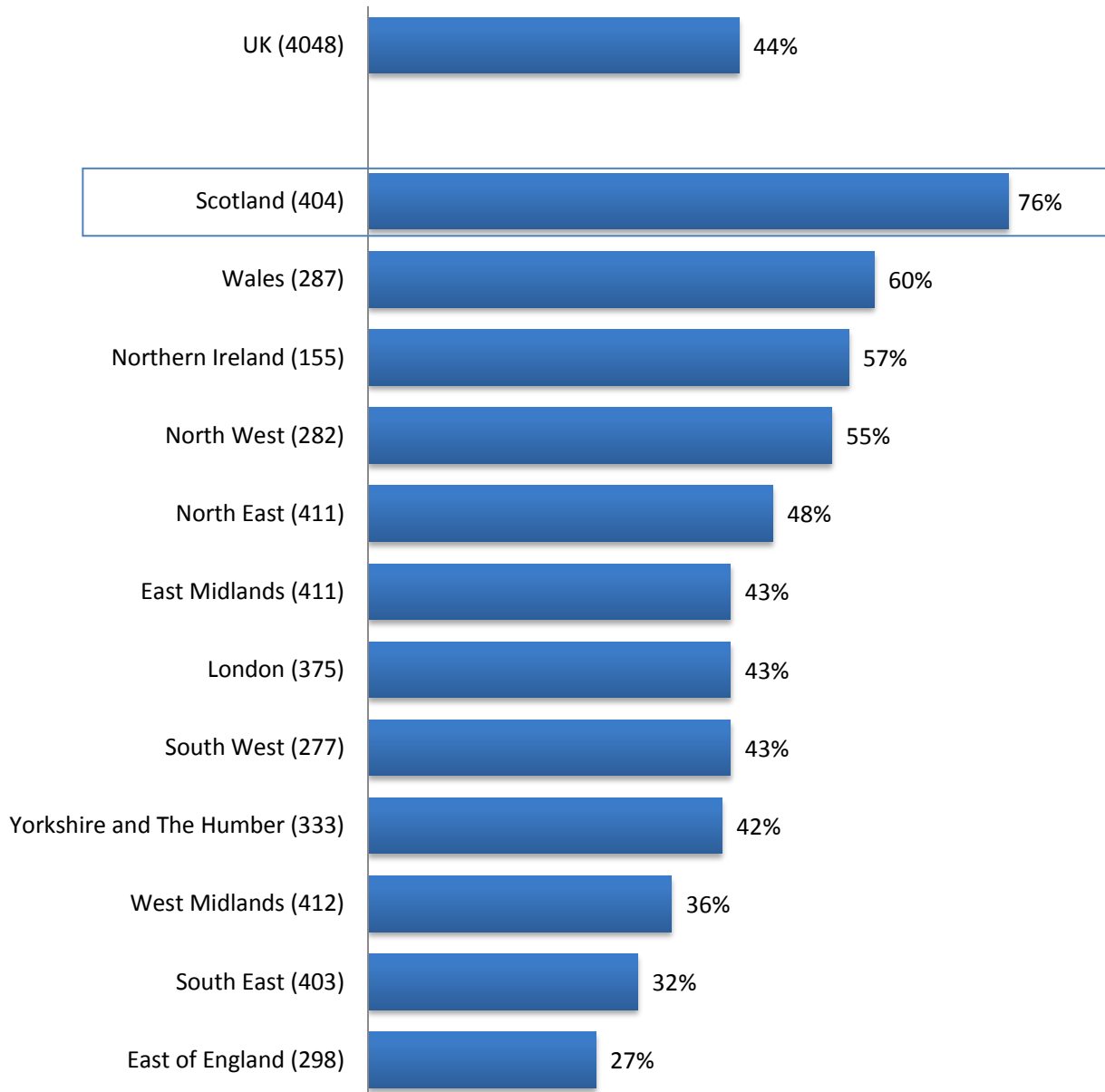


The proportion of construction workers in Scotland that have spent all of their time in Scotland is higher amongst older workers (84% of 45+ year olds cf. 72% of those below 45 years old). There are no significant differences based on how long respondents have worked in the construction industry, with these proportions ranging from 78% of those that have worked in the industry for less than a year to 76% of those that have worked in the industry for five years or more.

Figure 43 shows that Scotland has the highest proportion of workers who have spent all their time in the current region/nation in the UK (significantly higher than every other region/nation and the UK average, 32%).

Figure 43: 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 44. In Scotland, three-quarters (76%) indicate their employer operates nationwide, with a quarter (24%) stating that their employer operates in particular parts of the UK including Scotland.

Figure 44: 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 45 illustrates. As in 2015, construction workers in Scotland are most likely to state that their last site was in the same nation (98%), slightly higher than in 2015 (94%).

Figure 45: 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. Overall, the vast majority of all construction workers in Scotland were living in Scotland when they started their construction career (96%), which is the highest of the 12 regions/nations in this regard. This compares with other regions/nations where the proportion is significantly lower (East of England at 44%; South East at 51%). Figure 46 summarises this data.

Figure 46: 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 47 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 there are great variations by region/nation, the vast majority of construction workers in Scotland (96%) achieved their first qualification there.

Figure 47: 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

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 working in their region/nation of residence varied.

All of the workers in the sample are travelling to work from the same nation in which their current residence is based (100%).

Figure 48: 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

Unweighted bases for 2018/19 in parentheses

Q52/Q54



The extent to which construction workers live in the same region/nation in which they work is further illustrated in Figure 49. All of those in the sample are currently living in the same nation as the site they work on (100%), which compares with 96% in 2015.

Figure 49: Region/nation of current site in relation to current residence

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

Region/nation of current residence	Region/nation currently working in											
	EM %	EE %	GL %	NE %	NW %	NI %	SC %	SE %	SW %	WA %	WM %	YH %
East Midlands	90	9	0	0	0	0	0	11	0	*	14	6
East of England	1	60	18	0	0	0	0	10	0	0	*	0
London	0	16	63	0	0	0	0	9	0	0	*	1
North East	0	0	*	96	0	0	0	0	0	0	0	2
North West	*	0	*	*	94	0	0	0	0	0	4	1
Northern Ireland	0	0	2	0	0	100	0	1	0	0	0	0
Scotland	0	0	1	1	0	0	100	*	0	0	0	0
South East	1	11	14	0	0	0	0	55	2	0	0	*
South West	0	1	0	0	0	0	0	9	94	2	*	0
Wales	0	0	*	0	1	0	0	2	2	98	1	0
West Midlands	6	2	1	0	0	0	0	4	2	0	80	1
Yorkshire and the Humber	2	1	1	3	5	0	0	*	0	0	1	88
Unweighted bases	309	270	341	335	257	145	196	362	243	258	308	290

Q52/Q54



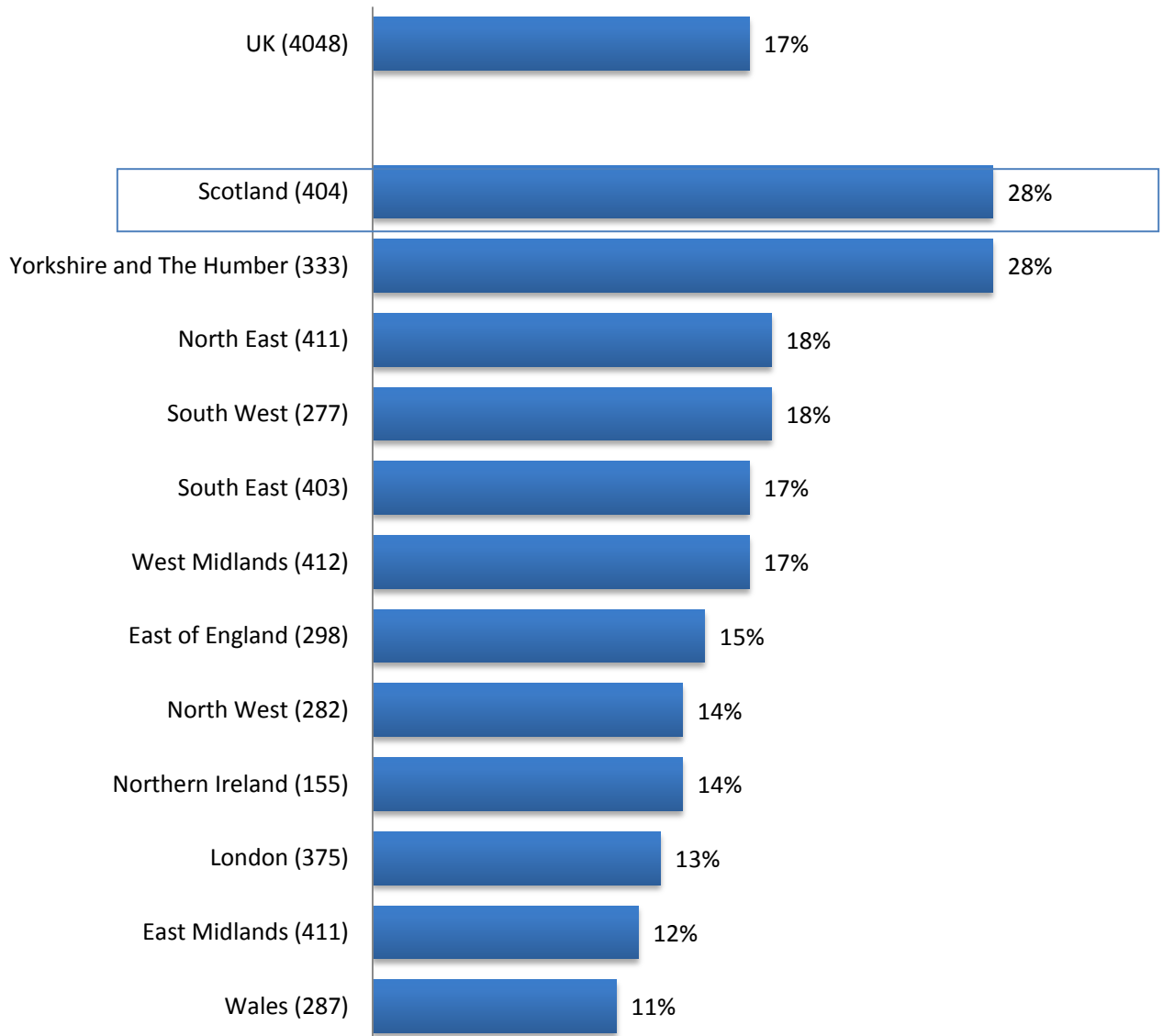
Furthest distance worked in last 12 months

All workers were asked to indicate the furthest distance they have worked from their permanent or current home in the last 12 months. Within Scotland, around one in three construction workers have worked no more than 20 miles away (30%) and nearly a further one in five have worked between 21 and 50 miles away (21%). This leaves nearly half that have worked more than 50 miles from their permanent home (46%), with over a quarter having worked 100 miles away or more (28%).

Compared with workers in other regions/nations, workers based in Scotland are amongst the most likely (alongside workers in Yorkshire and The Humber, both at 28%) to have travelled more than 100 miles from their permanent home to work in the last 12 months.

Figure 50: 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, the Scottish proportion is towards the lower end of the range (2%), with the lowest proportion in the North East (1%), and the highest in London (10%).

Figure 51: 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 Scotland, the average (mean) distance from workers' current residences (taking into account temporary residences) to their current site was 18 miles, which is slightly more than the average of 16 miles reported in 2015 and comparable to the mean across the UK, but still less than the average of 33 miles reported in 2012.

Nearly four in 10 (38%) travelled less than 10 miles from their current residence to the site they work, whilst 30% travelled between 10 and 19 miles, 25% travelled between 20 and 49 miles, 6% travelled between 50 and 99 miles, and 1% travelled more than 100 miles.

Site duration and change

Expected site/phase duration

All construction workers who are currently employed on a temporary basis (22% of all construction workers in Scotland) were asked how much longer they expect to be working for the company/person/agency paying them. In summary, 13% expect to work for another week or so, or less; 16% expect another month; 13% between a month and 3 months; 8% between 3 and 6 months; 9% between 6 months and a year, and 1% expect to still be working for their current company/agency in more than a years' time. Two in five temporary



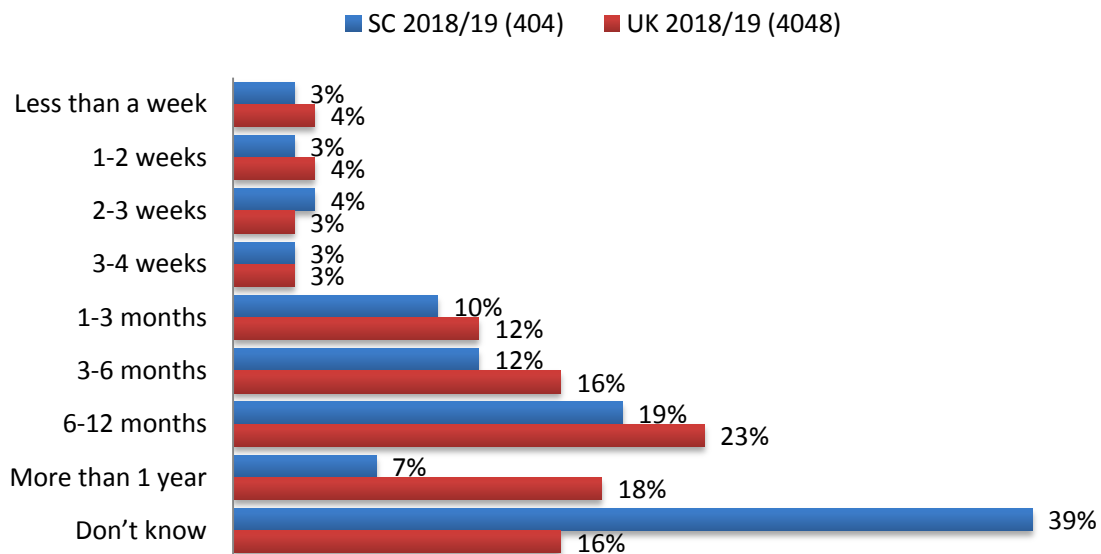
workers in Scotland did not know how much longer they could expect to be working for their current company/agency (41%; 38% across the UK).

In order to get a measure of workplace stability, 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 1 in 7 construction workers in Scotland (14% cf. 21% in 2015 and 26% in 2012) do not expect to work on that site for more than a month, including 3% that only expect to be there for a week or less. Two-fifths anticipate being on site for more than a month, but less than a year (41%), while just 7% expect to stay on that site for a year, which is a decrease compared with 2015 (27%) when a significant increase compared with 2012 was reported (14%). It compares with a UK average in 2018/19 of 18%. However around four in ten cases (39% cf. 30% in 2015 and 25% in 2012), workers did not know how much longer they could expect to be on site, indicating that a significant and growing minority of construction workers are living with a certain amount of uncertainty and insecurity.

Figure 52: 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 16-19 are more likely to be unsure of how much longer they can expect to work for (50% don't know).

Amongst the various trades/job roles, bricklayers (15%) are more likely to work less than 2 weeks at their current site, alongside plumbers (17%). Carpenters/joiners (57%) are the most likely not to know.

Around half of labourers/general operatives indicate that they expect to work at that site for more than a month, but less than a year (47%); whilst bricklayers and carpenters/joiners (both 29%) are least likely to indicate that this is the case.



Expected next site location

Around four in five 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, a similar proportion to 2015 (80% cf. 81% in 2015 and 63% in 2012). The remaining fifth of workers are sure that this will not be the case (3%); that it depends where the work is (11%); or that they don't know (5%).

Construction workers in Scotland are slightly below the UK average in this respect (84%).

Construction workers who are employed directly are more likely to be confident of this (82%), compared to those who are self-employed (75%). By trade/occupation, carpenters/joiners and plumbers are most likely to be confident of this (both 88%) whilst labourers/general operatives and scaffolders are least confident (both 72%).

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). It gives an indication of the likely pattern of movement between regions/nations. All of the sampled construction workers in Scotland (100%) that do not expect to be able to commute daily to their next job expect to remain in Scotland for their next job.

Figure 53: 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.

As in 2015, the vast majority of construction workers in Scotland have worked on new housing (89% cf. 86% in 2015). Unlike 2015, there has been an increase in the proportions of construction workers that have been working on all other types of projects.

Just under a quarter of all construction workers have only worked on one project type (23%), a decrease on 2015 (43%), indicating more flexibility across the workforce.

Figure 54: Type of projects spent significant periods on

Base: All respondents

	SC 2018/19 %	SC 2015 %	SC 2012 %	SC 2007 %	UK 2018/19 %
New housing	89	86	67	79	79
Housing repair and maintenance including extensions/loft conversions	48	42	55	62	46
Commercial work such as shops, office, pubs etc	46	40	43	43	51
Private industrial work such as factories, warehousing, mechanical engineering, land reclamation	40	32	44	40	45
Public non-housing work such as schools, sports facilities, landscaping	43	35	40	52	51
Infrastructure building projects, such as road/rail/airport, sewerage/water treatment, power stations	26	16	45	41	31
ONE TYPE ONLY	23	43	27	23	30
TWO TYPES	23	13	17	20	16
THREE TYPES	21	15	18	12	14
FOUR TYPES	13	10	13	19	12
FIVE TYPES	10	11	13	14	13
SIX TYPES	10	8	11	12	14
<i>Unweighted bases</i>	<i>404</i>	<i>463</i>	<i>409</i>	<i>240</i>	<i>4048</i>

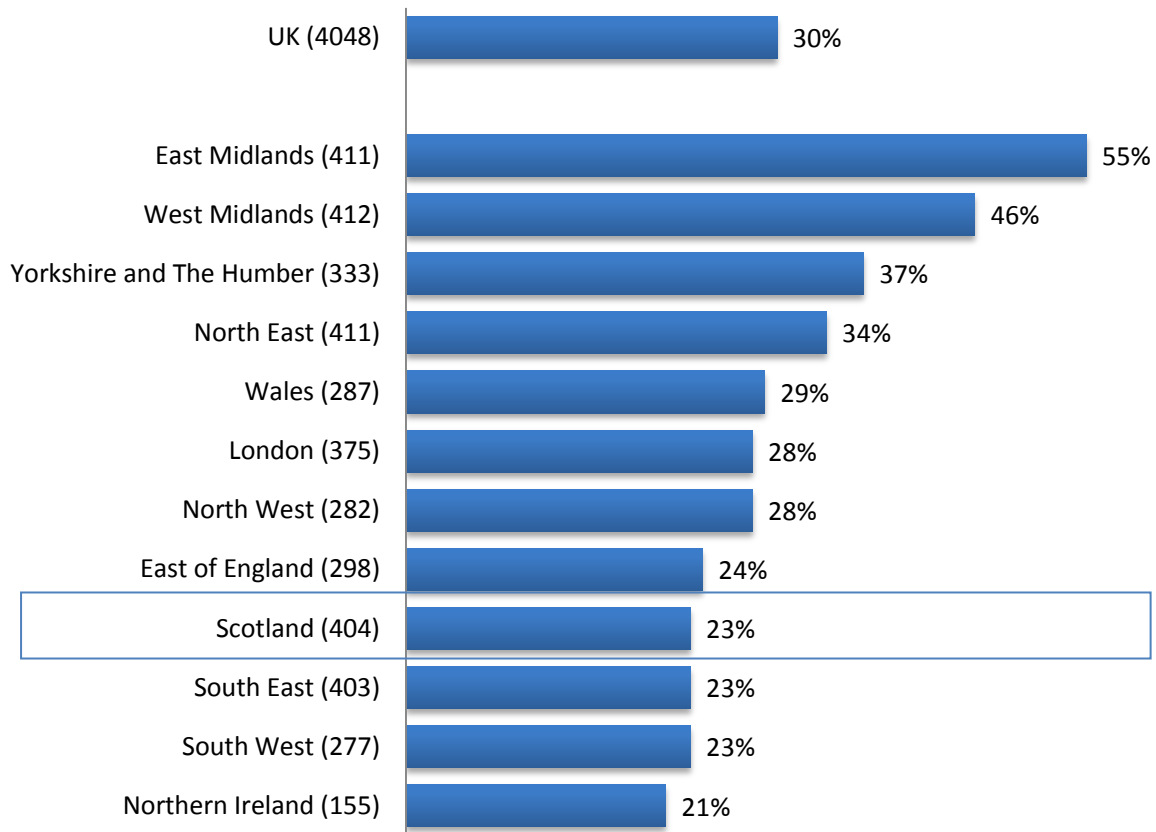
Q3/Q4



The number of project types worked on varies significantly by region/nation, as Figure 55 illustrates. Scotland is one of the less likely regions/nations to have construction workers who have worked on just one project type (23% cf. 30% in the UK).

Figure 55: 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, (from 73% of 16 to 19 year olds to 15% of 25 to 44 year olds and 19% of 45+ year olds). By current trade/occupation, the proportion is lowest amongst scaffolders (17%) who are most likely to have worked on 5 or 6 project types (31%).

Figure 56: Number of sub-sectors worked in, by occupation

Base: All respondents *Caution: Small sample base

	Unweighted bases	1 type %	2 types %	3 types %	4 types %	5 types %	6 types %
Bricklayers	55	22	25	15	16	11	11
Carpenters/joiners	56	21	23	16	9	14	16
Labourers/general operatives	109	34	22	21	13	5	6
Plumber	24	25	21	33	4	4	13
Scaffolder	29	17	21	14	17	3	28

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, four-fifths (82%) felt it was very likely that they would still want to, which is a higher proportion than the UK average (74%). This included, within Scotland, more than half of construction workers who say they definitely will be (55%); just over a quarter think it is very likely (28%); 8% quite likely; and 3% consider it unlikely. Just 1% say they definitely won't be and a further 1% hope to be retired by then, while 5% don't know.

Age is the predominant factor in this respect. The proportion that felt they would definitely or very likely still want to work in the construction sector in five years is highest amongst those aged 25-44 (86%) and lowest amongst younger workers (76% of 16-24 year olds). This is mostly due to larger proportions of younger construction workers stating that they are unsure.



Figure 57: Likelihood of construction workers still wanting to be working in the construction sector in five years' time

Base: All respondents

	SC 2018/19 %	UK 2018/9 %	Age			
			16 to 19 %	20 to 24 %	25 to 44 %	45+ %
Definitely will be	55	48	55	53	54	56
Very likely	28	26	23	22	32	25
Quite likely	8	11	14	12	8	5
Quite unlikely	1	2	0	5	1	1
Very unlikely	2	2	0	0	1	3
Definitely will not be	1	1	0	0	1	2
Hope to be retired	1	4	0	0	0	3
Don't know	5	5	9	7	3	5
<i>Unweighted bases</i>	<i>404</i>	<i>4048</i>	<i>22</i>	<i>58</i>	<i>178</i>	<i>144</i>

Q38A

Excluding those aged 60 and over (as those over 60 may be assumed to be considering retirement in the next 5 years): 55% believe they will definitely want to be working in the construction sector, 28% 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 4% 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 2012 (8% in 2015 and 13% in 2012).

Overall, 5% 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 (44%, 7 respondents), while a quarter thought they might be better paid in work outside of construction or that it would be easier to get work to provide more security (both 25%, 4 respondents). Other reasons, each cited by 3 respondents, included more interesting work outside of construction, better use of skills/abilities, and more suitable hours/working conditions.



The Scotland 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. However, this is not clearly apparent in Scotland in that the rate of self-employed has scarcely changed (25% in 2015, 24% in 2018/19) and fewer workers in Scotland than UK-wide are employed on a temporary basis in 2018/19 (22%, compared to 28%).

Workers in the region, on average, travel similar distances to their current site as the UK average (both 18 miles) and the distance they travel has increased slightly since 2015 from 16 miles. Across the regions and nations, they are most likely (alongside those in Yorkshire and the Humber) to have travelled more than 100 miles from their permanent home to work in the last 12 months (28%, compared with a UK average of 17%).

Scottish construction workers are most likely to report that they work at their current site because their employer sent them there (58%), with a smaller proportion citing having always lived there or growing up there (45%). These proportions are both slightly higher than the UK average (51% and 43% respectively). 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 Scottish workers compared with the UK as a whole in this respect. This is further highlighted by the fact that Scottish workers are more likely than those in any other region/nation to indicate that they were based in the same region/nation for their last job (98%), and this proportion is slightly higher than in 2015 (94%). Similarly, Scottish workers are the most likely of any region/nation to have remained in the same region/nation in which they started their careers (96%), and also the most likely to be based in the same region/nation as when their first qualification was achieved (96%).

There is some evidence of uncertainty with regard to the duration of temporary employment within Scotland; 41% do not know how long they expect to continue with their current employer/agency, compared with a UK average of 38%. Additionally, two-fifths (39%) are not sure how long they expect to work at their current site during this phase, which is significantly higher than the UK average of 16%.

Compared with 2015, a similar proportion of Scottish workers were 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 (80%, compared with 81%).

Scottish construction workers are considerably less likely to have worked in more than one trade than they were in 2015 (10%, compared to 26% in 2015 and 36% across the UK in 2018/19) but also considerably less likely to have worked in just one project area (23%, compared to 43%). There is therefore mixed evidence in relation to the widening of experience in Scotland.

In terms of skills and qualifications, it is encouraging to note that the vast majority of Scottish construction workers continue to hold some form of skill card or certificate, and this proportion is higher than the UK average (99% cf. 97%). There are similar levels of qualified workers in the nation, compared with the UK, but a significantly smaller proportion of



workers in Scotland are working towards a construction qualification (11% cf. 15% across the UK).

Very few construction workers in Scotland in 2018/19 believe they would benefit from training in basic skills (2%) and this proportion is considerably lower than in previous years (9% in 2015; 25% in 2012) and the UK average in 2018/19 (11%).



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