



# THE FUTURE OF SOCIAL HOMES FOR RENT IN SCOTLAND

Empowering local authorities and harnessing new technologies to build more homes for social rent.



## CONTENTS

Executive summary	04
Scotland needs to build more homes for social rent	06
The causes of the problem	08
The solution: stop relying on RSLs to build	12
What might stop councils taking responsibility for building these homes?	14
Facilitating the revolution and convincing Holyrood	20
Putting theory into practice	24
The attitude of councils	26
Conclusion	28
Methodology	30
About Scape Scotland	31

# EXECUTIVE SUMMARY



Mark Robinson, group chief executive, SCAPE

## Scotland needs more homes for social rent. There are currently 137,100 households on council waiting lists<sup>1</sup> and many others waiting for homes with Registered Social Landlords (RSLs).

The average local authority in Scotland currently has just 101 homes for social rent available to help people on waiting lists. Those are the findings from a recent poll of 25 senior managers and decision-makers within Scottish local authorities with responsibility for the council's housing strategy or the delivery of new affordable homes.

Across Scotland, only 1,187 homes for social rent were built by local authorities in 2017-18. In the previous 10 years (2007-08 to 2016-17 inclusive) just 7,325 were completed in total<sup>2</sup>.

Local authorities quite rightly want to address this situation.

Almost half (48 per cent) of the council officers polled said their local authority was "very concerned" about the total number of homes for social rent currently being built in their area.

This included building by all parties involved in the construction of homes for social rent, from the local authority itself, to private sector providers and RSLs.

The public are equally alarmed. When we asked 1,000 Scottish adults if they thought there is currently a shortage of homes for social rent in Scotland, 75 per cent said they thought that there was. Almost four in every five (79 per cent) of over 45s thought the same.

The answer is to take the remaining responsibility for the delivery of new homes for social rent out of the hands of RSLs. Building homes for social rent should become the sole preserve of local authorities, who have long standing experience of building homes for social rent.

While the current system is not generating sufficient results, any alternative would also need to overcome two major obstacles, the skills shortage in the Scottish construction industry and the lack of human resources dedicated to council house delivery within local authorities.

The use of modern methods of construction (known in the construction industry as "MMC"), provided by third party outsourcers, can help to solve these problems. This approach can enable quality affordable housing to be developed rapidly, with up to four times as many homes by an onsite labour force as that needed for a traditional build<sup>3</sup>.

Even without a shift in responsibility proposed here, bodies looking to accelerate their own building programmes (from co-operatives and Arm's-Length Management Organisations [ALMOs], to local authorities and RSLs) should consider modern methods of construction which enables the rapid evaluation of potential plots.

They can help local authorities work around a lack of staff within their own organisation, as well as the wider construction sector's skills shortage, offering benefits in terms of; minimising time spent on site (especially in tight urban plots), construction delays, waste, snagging, and the need for onsite inspection. MMC can also increase certainty of cost and delivery in the planning period.

**137,100**

households on council waiting lists<sup>1</sup>

**7,325**

homes for social rent built in 10 years

<sup>1</sup>Review of Strategic Investment Plans for Affordable Housing, Shelter Scotland, Gillian Young and Tony Donohoe, February 2018.

<sup>2</sup>Affordable housing supply, Scottish Government, 2018.

<sup>3</sup>Using modern methods of construction, National Audit Office, November 2005

# SCOTLAND NEEDS TO BUILD MORE HOMES FOR SOCIAL RENT

**Scotland needs a significant amount of additional homes for social rent to meet demand.**

There are currently 137,100 households on council waiting lists<sup>4</sup> and many others waiting for homes with Registered Social Landlords (RSLs). Set against a huge wave of demand is a tiny pool of available homes for social rent – approximately 3,200 across the country.

These are the findings from a poll commissioned by Scape Scotland, which surveyed senior managers and decision-makers with responsibility for the council's housing strategy or delivery of new affordable homes from 25 of Scotland's 32 local authorities.

**The research revealed local authorities throughout Scotland currently have, on average, just 101 homes for social rent available to help people on waiting lists.**

Almost half (48 per cent) of council officers said they were "very concerned" about the provision of social rented housing in their area (including housing provided by RSLs, the private sector, or the local authority itself). In South Scotland, 78 per cent of council officers said they were "very concerned". All of the council officers polled said they were either "quite concerned" or "very concerned" about the number of social housing being built in their area.

When we asked council officers how many homes for social rent they would like to see built in their area every year (by their local authority, RSLs, or any other provider), the average response was 307. Local authorities in Edinburgh, Glasgow and Aberdeen aspire to build 770 homes every year, on average.

**This suggests that council officers would like to see homes for social rent built at a rate of approximately 9,800 homes every year across Scotland.**

While this chimes with current targets (the Scottish government has said it aspires to build 35,000 homes for social rent by March 2021<sup>5</sup>), which far outstrips the current rate of building.

Only 1,200 new homes for social rent were completed in 2017-18 across Scotland (and only 7,325 in the previous 10 years<sup>6</sup>).

**Our research suggests local authorities would like to build at eight times the current rate.**

**9,800**

homes for social rent every year  
(the desire of council officers)

**35,000**

homes for social rent by March 2021  
(the desire of government)

The Scottish public is as worried as local authorities. In a separate poll of 1,000 adults, 87 per cent described themselves as **"very concerned"** about the lack of homes for social rent being built in Scotland.

Almost three quarters (72 per cent) agreed that **Scotland needs to build more homes for social rent**, while only one in 14 (seven per cent) disagreed.

<sup>4</sup> Review of Strategic Investment Plans for Affordable Housing, Shelter Scotland, Gillian Young and Tony Donohoe, February 2018.  
<sup>5</sup> More Homes Scotland update: March 2018, Housing and Social Justice Directorate March 2018.  
<sup>6</sup> Affordable housing supply, Scottish Government, 2018.

## THE CAUSES OF THE PROBLEM

**There is no question that RSLs manage estates effectively. The Scottish Housing Regulator says that 9 out of every 10 tenants are satisfied with the homes and services their landlord provides<sup>7</sup> and that 98 per cent of complaints are dealt with in a timely fashion.**

But however good their management of estates, when it comes to building enough new homes for social rent, the RSL model is not supplying the results Scotland needs. According to the National Report on the Scottish Social Housing Charter, there are approximately 160 RSLs in Scotland<sup>8</sup>.

There were just 2,965 new build RSL Rent completions in 2017-18 in Scotland which suggests the average RSL in Scotland built fewer than 19 homes for social rent last year.

It is no wonder that even the Scottish Federation of Housing Associations admits that there is a shortage of decent, affordable social housing in Scotland<sup>9</sup>.

The model is not producing sufficient new social rented housing, despite comparatively benign financial circumstances.

In recent years, RSLs have benefited from a buoyant stock market (lowering their pension deficits) and healthy RPI (Retail Price Index) inflation. Historically low interest rates<sup>10</sup> mean smaller interest payments on borrowing and cheaper new borrowing to finance new homes.

The low rate of construction is not a temporary phenomenon either. The average number of RSL new build completions since the Millennium is just 3,461 per year.

“

**There were just 2,965 new build RSL Rent completions in 2017-18 in Scotland which suggests the average RSL in Scotland built fewer than 19 homes for social rent last year.**”



<sup>7</sup> National Report on the Scottish Social Housing Charter, Scottish Housing Regulator, August 2018.

<sup>8</sup> National Report on the Scottish Social Housing Charter, Scottish Housing Regulator, August 2018.

<sup>9</sup> FAQs, Scottish Federation of Housing Associations, 2018.

<sup>10</sup> The current Bank of England base rate is 0.75 per cent and has been since 2 August 2018. This is the highest it has been in nine years. Before August 2018, it had stood at 0.5 per cent since November 2017. Between August 2016 and November 2017, the base rate was at a historic low of 0.25 per cent. Prior to that, it spent seven years at 0.5 per cent.

Even in the sector's most prolific year, 2009-10, RSLs only completed 4,749 homes<sup>11</sup>.

**The dearth of building cannot, therefore, be written off as simply the result of Brexit, which took place on 23 June 2016, or other short-term factors, such as the 2005 change in financial borrowing rules.**

Between 2000-01 and 2004-05, on average, only 3,581 homes for social rent were built by RSLs each year. In 2003-04, for instance, before financial borrowing rules were introduced, just 3,225 homes were built this is a long-term issue.

Of course, the role of RSLs in society goes beyond that of a private sector housebuilder. RSLs assist in regeneration and support tenants with mental health problems or those affected by domestic violence.

RSLs help residents to secure new qualifications and find employment<sup>12</sup>. While this is laudable, it does not change that too few homes for social rent are being built.

There is no prospect of immediate change either. Unless we change course, things are not going to get better.

Average social housing grant levels in Scotland are already higher than in the majority of Britain, and commentators agree affordable housing supply has already been significantly boosted as a result<sup>13</sup>.

Delivering a step change in building will need a radical solution, certainly much more radical than ending Right to Buy, which will only prevent the sale of 1,500 homes a year<sup>14</sup> or amending financial borrowing rules for RSLs.

# 3,225

homes for social rent were built in 2003-04

# 3,581

homes for social rent were built on average between 2000-1 and 2004-05

<sup>11</sup> R Affordable Housing Supply, Scottish Government, 2018.

<sup>12</sup> Housing associations play a vital role in building the new homes the UK needs, CIH, Terrie Alafat, July 2015.

<sup>13</sup> Is Scotland building enough homes?, Inside Housing, Michael Lloyd, February 2018.

<sup>14</sup> Social Housing, Cabinet Secretary for Communities and Local Government, 2018.



## THE SOLUTION: STOP RELYING ON RSLs TO BUILD

Scotland must find a new way to build quality new homes for social rent cost-effectively.

**According to the Scottish Government, the average cost per unit for an RSL to build a new home over the five years to 2016-17 (the latest available figures) was £130,000, up eight per cent on 2015-16<sup>15</sup>.**

By way of comparison, in 2015, the Home Builders Federation (which represents private housebuilders in England and Wales, where building costs are higher than in Scotland), quotes an average of £90,000 for a three-bedroom house with land included<sup>16</sup>.

Increased upfront investment, to build high quality housing, makes sound business sense for RSLs. They have a vested interest in an asset that they will own for the next 50 to 100 years. Building cheaper in the short-term might well cost slightly more in the long-term. But there is a balance to be struck. Scotland needs more homes for social rent urgently to meet demand.

And the Scottish government is already subsidising these costs; the average grant input by the Scottish government, calculated at a tender approval stage was £126,250.

**In January 2016, subsidy rates for affordable homes for rent delivered by councils and RSLs were increased by up to £14,000 per unit<sup>17</sup>.**

There is a more efficient way to solve this problem. The Scottish government should give local authorities sole responsibility for the delivery of new homes for social rent (along with the associated funding).

While there has been a partial shift back to a reliance on local authorities building homes for social rent in Scotland, rather than RSLs, this has not gone far enough.

Local authorities need to be empowered to get social housing built, at the required scale, and given the associated public funding.

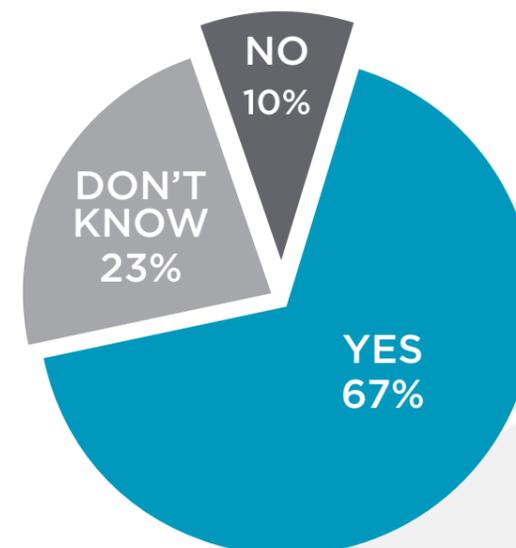
Scotland's public sector certainly has a good track record of building at scale. Historic trends in traditional house building showed peaks in the early 1950s and late 1960s, reaching a high point of about 41,000 to 43,000 completions a year, mainly in the public sector<sup>18</sup>.

Even if we accept the new orthodoxy that social housing should be viewed as a temporary safety net for households to call upon only in times of particular need, the contrast between the rates of delivery is stark.

Giving councils sole responsibility for the construction of new homes for social rent would be popular with local authorities. **All the council officers surveyed said their local authority would like sole responsibility for building more homes for social rent, rather than relying on RSLs.**

And when we asked people living in Scotland, two thirds (67 per cent) said they would prefer councils were solely responsible for building more homes for social rent, rather than having to rely on RSLs. Whereas just 10 per cent thought otherwise.

Would you rather that councils were solely responsible for building more homes for social rent?



<sup>15</sup> Affordable Housing Supply Programme Out-turn Report 2016-17, More Homes Division, January 2018.

<sup>16</sup> Why housing associations are the true villains of the property crisis, The Spectator, July 2015.

<sup>17</sup> Affordable Housing Supply Programme Out-turn Report 2016-17, More Homes Division, January 2018.

<sup>18</sup> Housing statistics for Scotland 2010: Key Trends Summary, Scottish Government, 2018.

# WHAT MIGHT STOP COUNCILS TAKING RESPONSIBILITY FOR BUILDING THESE HOMES?

**There are two practical barriers that would prevent local authorities from taking sole responsibility for the delivery of homes for social rent in their area.**

One issue is the skills shortage within the Scottish construction industry. Three in five (60 per cent) of the council officers polled said the skills shortage would be one of the main barriers preventing local authorities from building more housing in their area.

This is, however, a more serious concern given that the skills gap is set to widen. As detailed in our "Sustainability in the Supply Chain" report, the UK is heavily reliant upon imported labour. Since the financial crash in 2008, the UK construction sector has become increasingly dependent upon talent from the European Union.

The proportion of EU migrants in the construction sector rose from four per cent to seven per cent between 2007 and 2014<sup>19</sup>. In 2016, around 5,000 EU citizens worked in Scotland's construction sector, accounting for around four per cent of all EU citizens employed in Scotland<sup>20</sup>.

<sup>19</sup> The impact of Brexit on construction sector laid bare, Scape, Matt Carrington-Moore, March 2017.

<sup>20</sup> The contribution of EEA citizens to Scotland, Scottish Government, November 2017.



### This raises three potential problems.

**First**, it appears the referendum result itself is already beginning to make the UK less attractive to EU nationals who might otherwise contemplate moving, as well as to those already living in Scotland. The latest official figures showed the biggest fall in the number of workers from eastern Europe since modern records began<sup>21</sup>.

In its latest update on the state of the labour market, the Office for National Statistics revealed that, in the countdown to Brexit, the number of workers in the UK from countries in the former Soviet bloc fell by 154,000 in the past year.

Official figures covering the summer and early autumn showed a 15 per cent drop over the past year in the number of people employed from eight countries that joined the EU in 2004 (Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia, and Czechia)<sup>22</sup>.

This is particularly concerning given that most EU citizens residing in Scotland are from the so-called “EU8” countries, representing 59 per cent of the total number of EU citizens living in Scotland<sup>23</sup>.

Many businesses have expressed concerns about the impact that the negative rhetoric against migration is having on individuals already in Scotland, or those who may be considering coming here. This is a concern shared by the Scottish Government<sup>24</sup>.

**Second**, Theresa May plans to give back the UK control over immigration rules, ending the free movement of people within the EU<sup>25</sup>, shrinking the labour pool further.

# 154,000

decrease in workers coming from the former Soviet bloc in the past year

# 3 in 5

council officers polled think lack of resource would be a barrier

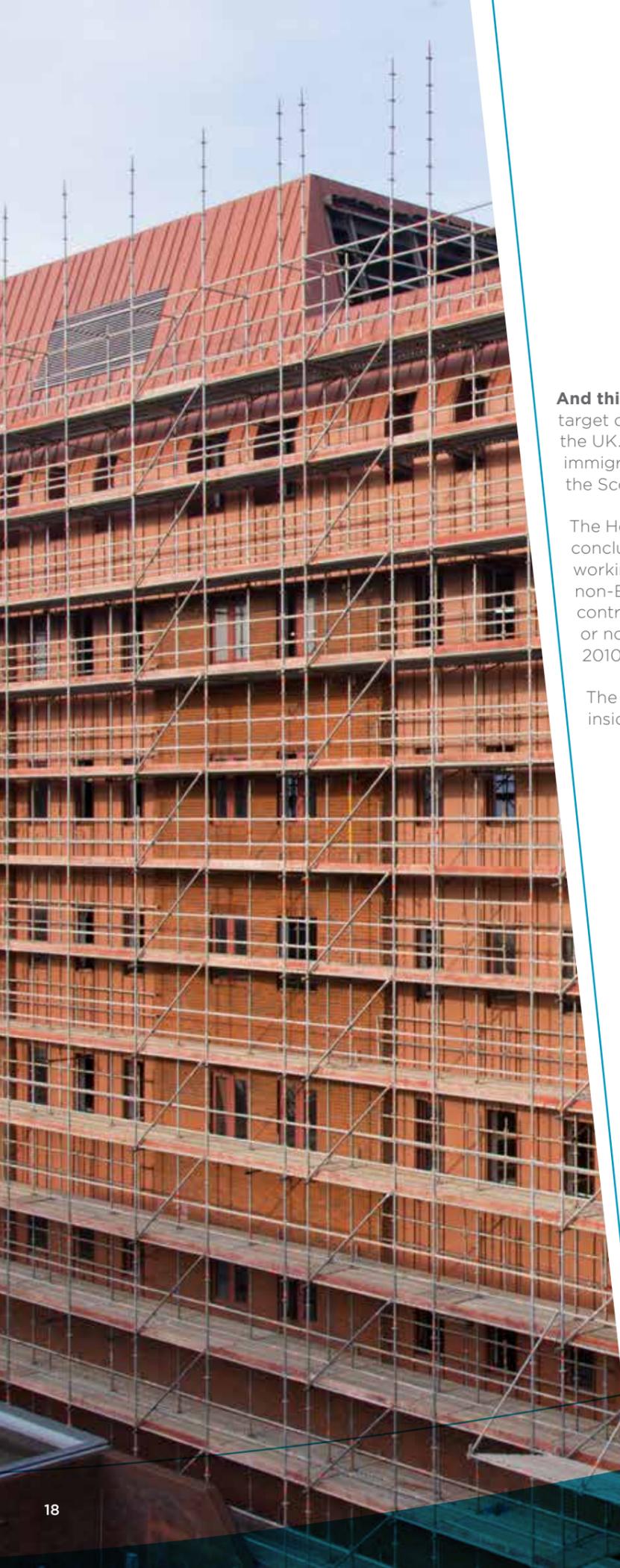
<sup>21</sup> Skills shortages harming UK business, employers warn, The Guardian, Larry Elliot, November 2018.

<sup>22</sup> UK labour market: November 2018, Office for National Statistics, November 2018.

<sup>23</sup> The contribution of EEA citizens to Scotland, Scottish Government, November 2017.

<sup>24</sup> Scotland's population needs and migration policy: discussion paper, Scottish Government, February 2018.

<sup>25</sup> Brexit: Jargon-busting guide to the key terms, BBC, October 2018.



**And third,** it is UK policy to reduce net migration to a target of “tens of thousands” per year for the whole of the UK. This matters to Scotland because powers over immigration are reserved to the UK Government under the Scotland Act 1998<sup>26</sup>.

The Home Affairs Committee at Westminster has concluded that the net migration target “is not working” and has observed that “net migration of non-EU migrants alone, which the Government can control regardless of whether the UK is in the EU or not, has consistently exceeded 100,000 since 2010”<sup>27</sup>.

The flow of critical migrant workers, from both inside and outside the EU, therefore looks uncertain.

Of all the home nations, this will hit Scotland disproportionately hard. In a discussion paper on migration published in February 2018, the Scottish government suggested that all of Scotland’s population growth over the next 25 years is projected to come from migration<sup>28</sup>.

This is unlike the rest of the UK, where natural change contributes significantly to population growth; it is projected to account for 39 per cent of the UK’s population increase between 2016 and 2041<sup>29</sup>.

Wider immigration changes will sit on top of a rapidly ageing construction workforce and an existing lack of replacement workers with the necessary skillsets, which is already affecting the feasibility of projects and increasing costs.

The second factor that would stop local authorities taking sole responsibility for the delivery of more homes for social rent is in-house capacity within councils.

Three in every five council officers surveyed (60 per cent) think that, were their local authority to be given the opportunity to build more homes for social rent (in terms of responsibility and funding etc.), the lack of staff within their organisation would also be a barrier.

This was a particularly serious problem for local authorities in South Scotland, Central Scotland, and Lothians, where 64 per cent of those polled said this would prevent them taking responsibility for the development of homes for social rent.

More than half of the council officers polled (52 per cent) said their local authority would consider it “very important” to consider how to go about working around their lack of internal resources when homes are being built in the area.

<sup>26</sup> Scotland Act 1998: Schedule 5, Section B6 Immigration and Nationality, UK Government, 1998.

<sup>27</sup> Immigration policy: Basis for building consensus, House of Commons, January 2018.

<sup>28</sup> Scotland’s population needs and migration policy: discussion paper, Scottish Government, February 2018.

<sup>29</sup> Ibid

# FACILITATING THE REVOLUTION AND CONVINCING HOLYROOD

**To take sole responsibility for the delivery of new homes for social rent, then accelerate their rate of construction, local authorities will need to convince the Scottish government that they are best-positioned to meet the challenge. By using this approach, we can continue to deliver results as the industry continues to address the skills shortage.**

The solution is to outsource the building of homes for social rent via third-parties using modern methods of construction, side-stepping the worst effects of the skills shortage.

Contracting authorities and framework providers can help to support the delivery of housing for local authorities that are experiencing resourcing challenges. The most sophisticated framework providers are committed to compliance, local delivery, demonstrating value for money and enhancing levels of community benefits.

## Modern methods of construction include:

- Volumetric construction (manufacturing 3-dimensional modules in factories then transporting them to the construction site and assembling them onsite to form a substantially complete building; ideally, only bolting and interconnection of building services is required at the site)
- Panelised construction (building walls, floors, and ceilings in factories then hauling them to the construction site for installation)
- Hybrid techniques (that combine both panelised and volumetric approaches)
- Sub-assemblies (involving factory built components such as roof cassettes that are added to otherwise traditionally built structures).

Using off-site building technology, it is possible to build up to four times as many houses with the same onsite labour required for a traditional build<sup>30</sup>.

Because factory-based production does not generally draw from the same labour pool as onsite construction, modern methods of construction does not compete for the same skills as traditional methods<sup>31</sup>. This will be crucial as the pool of labour shrinks and the need to build continues to grow.

Modern methods of construction also increase certainty of delivery. This is the top priority of Scottish local authorities when homes are being built in their area.

Almost two thirds of the council officers we polled (60 per cent) said their local authority would consider increasing cost certainty "very important" with the remainder viewing this as "quite important".

This matched wider public opinion: avoiding overrunning costs is the most important factor in the eyes of the public, with 63 per cent regarding this as very important.

Almost half (48 per cent) thought increasing certainty of delivery in the plan period was "very important" while more than a third (36 per cent) said it was "very important" to avoid construction delays. The public thought avoiding delays was more important than local authorities, with almost half (47 per cent) describing this as "very important".

This route also shortens the time it takes to build homes onsite (as so much of the work is carried out offsite) and help to minimise waste. Modern methods of construction can reduce onsite construction time by more than half<sup>32</sup>. Cost ranges would be comparable depending on specific project circumstances.

Almost half (48 per cent) of the council officers polled said that minimising time spent onsite (especially in tight urban plots) was “very important” – with 83 per cent of respondents in Edinburgh regarding this as “very important”.

Almost two in every five members of the Scottish public (39 per cent) said minimising time spent onsite was “very important” with 88 per cent describing this as important (either “very important” or “somewhat important”).

Over a third (36 per cent) of council officers said that enabling rapid evaluation of potential plots was “very important” while approximately a quarter (24 per cent) said minimising construction waste was “very important”.

The public regarded minimising waste as more important than local authorities, with 60 per cent saying this was “very important”.

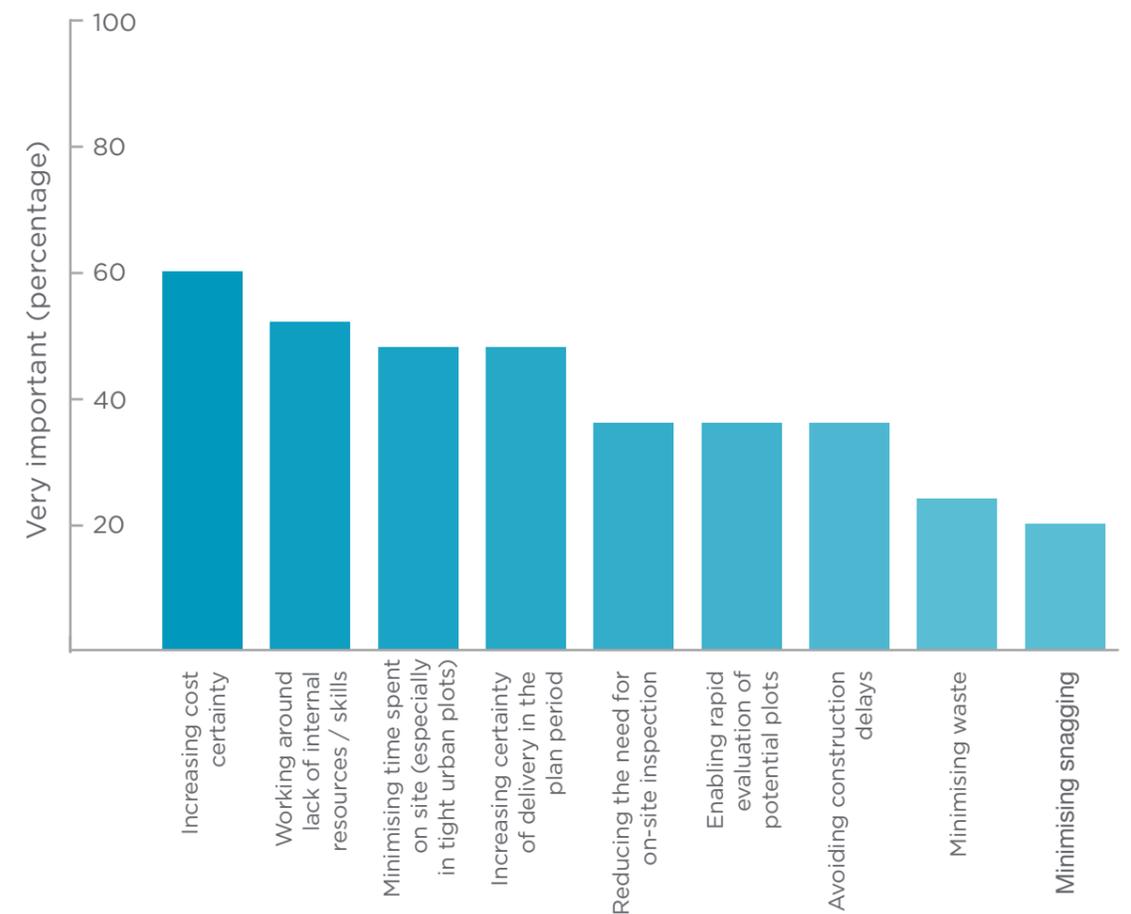
Further, modern methods of construction can help to minimise defects at completion.

As tighter quality control is possible in factories, where much of the construction takes place, this also reduces the time required for onsite inspection.

In our research, minimising snagging was viewed as important (either “very important” or “quite important”) by 92 per cent of the council officers while reducing the need for onsite inspection was cited as “very important” by more than a third (36 per cent).

“The public regarded minimising waste as more important than local authorities.”

When homes are being built in the area, to what extent would your local authority consider the following factors important?



# PUTTING THEORY INTO PRACTICE

**These benefits are achievable.** Robertson, delivery partners for Scape Scotland Construction, is already delivering affordable housing in this way, for a local authority in Stirling.

By 2022, they will build 313 new homes of which 55 units have been procured via the Scape Scotland Construction framework, at Gowanhill Gardens, at Raploch Road, Kildean and Drip Road. This is part of a £42 million residential housing project in Raploch on behalf of Stirling Council.

166 of the units will be social or mid-market rented accommodation (with 147 for private sale).

By using a unified palette of wall and roof materials, and fittings such as doors and windows, in addition to using volumetric offsite construction techniques, modules are being delivered to the construction site to then be connected to foundations and finished to the required specification<sup>33</sup>.



# SONAS HOUSING

SONAS Housing has been developed by Robertson group for use on the Scape Scotland Construction framework to allow clients to gain an estimate of the cost of building Modern Methods of Construction designed housing.

With a broad range of accommodation which can be combined into semi-detached and terraced blocks to generate efficient layouts that maximise the potential of any development site, the SONAS range gives clients the opportunity to progress a proposed development quickly and with confidence.

While the house type layouts have been standardised to maximise efficiency, a number of options are available to tailor the house types to your specific needs.

The quality of the SONAS range can be assured and be delivered consistently with a high level of certainty with regards to build quality, development programme and cost. With the additional advantage of procuring via Major Works - Scotland the reduced procurement time can further enhance delivery time and along with embedded social value, ensuring spend remains in the local community.



<sup>33</sup> Raploch regeneration, Stirling.

## THE ATTITUDE OF COUNCILS

Fortunately, local authorities are open to the possibilities presented by modern methods of construction delivered by third party outsourcers and framework providers.

When we asked local authorities if they would consider this method of construction as an option for house building in their area, 100 per cent of Scottish council officers said that they would.

Unfortunately, while convinced of the theory, local authorities are not currently convinced that suppliers can produce the goods in practice.

When we asked council officers if they thought their local authority would use modern methods of construction to build at scale, 44 per cent said they thought that would be a problem.

Further probing suggested over a quarter (28 per cent) thought that existing outsourced modular building specialists would not be able to build at scale in the future.

This may not be entirely unfair on the sector. While there are now plenty of providers, demand is not yet at a level where optimum production efficiency can be achieved and costs can be brought down below those of traditional building methods.

**100%**

of Scottish council officers polled would consider modern methods of construction (MMC)

**44%**

of council officers polled thought using MMC at scale would be a problem

## CONCLUSION

Turning over responsibility for the delivery of every new home for social rent to local authorities alone is a radical solution to the shortage of social houses in Scotland.

In the absence of such a revolution and given that Scotland's housing crisis is bigger than just a shortage of social rented homes alone, RSLs and other bodies looking to accelerate their building programmes should consider modern methods of construction, as well as utilising frameworks that offer ongoing performance management processes on every project.

The tactics that we have proposed local authorities could use to overcome the problems of the skills gap and the lack of internal human resources (the use of modern methods of construction and an outsourced framework provider) apply equally to RSLs, for instance, looking to accelerate their building programmes (for social rent or otherwise).

Scape Scotland can help local authorities, ALMOs, and RSLs to build affordable housing – we have already created over 1,100 affordable homes.

By undertaking the procurement of construction and consultancy services for housing projects and providing architectural services on housing projects, offering innovative design solutions, Scape Scotland can help deliver more-for-less in these austere times.

Whilst Scape and our framework partners have delivered a substantial volume of housing schemes in Scotland, there is more that can be done to facilitate the adoption of modern methods of construction.

There are current perceptual barriers that need to be overcome to fully realise the benefits of modern methods of construction.

The Scottish Government could use the planning system and associated building standards to make it easier to build modular developments, for instance; pre-approved modular designs should be “fast tracked” through the planning system. And high-quality providers, capable of delivering at scale, should be supported by Scottish Government, with a strategy to ensure collaboration and encourage consolidation.

Scotland's housing crisis is bigger than just a shortage of social rented homes alone

Scape Scotland can help local authorities, ALMOs, and RSLs to build affordable housing

## METHODOLOGY

**The poll of senior managers and decision-makers within local authorities in Scotland with responsibility for the local authorities' housing strategy or delivery of new affordable homes was undertaken by survey consultancy Censuswide.**

The sample of 25 people, each from a separate local authority, meaning that almost 80 per cent of local authorities in Scotland were surveyed.

The fieldwork was undertaken between 10 October – 25 October 2018. Censuswide complies with the MRS Code of Conduct (2010) which is based upon the ESOMAR principles.

The consumer poll of 1,000 Scottish adults was undertaken by research agency, OnePoll.

The survey was conducted using an online interview administered to members of the OnePoll panel who have agreed to take part in surveys, eight per cent of whom are based in Scotland.

OnePoll are members of ESOMAR and employ members of the MRS.

## ABOUT SCAPE SCOTLAND

**Scape Scotland is a public sector organisation and contracting authority, dedicated to creating local growth and community benefits via the built environment.**

Working in partnership with both nationally recognised and local construction companies, we operate direct award frameworks, which are fully compliant with Scottish procurement regulations and can help you deliver your essential projects to the highest possible standard.

Investing in and engaging with local business and communities, keeping the pound local and ensuring fair payment for SMEs is as important to us as time, cost and quality, and every project is rigorously performance managed to ensure best value is achieved for you and your community.



2nd Floor, City Gate West, Tollhouse Hill,  
Nottingham, NG1 5AT

**+44 (0)115 958 3200**  
**general@scape.co.uk**

**scape.co.uk**

 **@Scape\_Group**

 **/scape**