

Employer Attitudes and Motivations to Learning and Training – Northern Ireland (wave 4)

Research Report

prepared for

CITB Northern Ireland / ConstructionSkills

by

IFF Research Ltd

April 2007

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1 Introduction

- 1.1 ConstructionSkills was established in September 2003, bringing together the Construction Industry Training Board (CITB), CITB Northern Ireland and the Construction Industry Council (CIC).
- 1.2 One of the overriding aims of ConstructionSkills is to ensure that the training and learning infrastructure across the UK reflects the needs of the industry in terms of quantity, quality and location of training, mode of learning and funding mechanisms. This requires that ConstructionSkills has a thorough understanding of the needs and practices of the industry relating to skill needs, learning and training.
- 1.3 ConstructionSkills has a varied programme of on-going research activity to meet these aims. The current research project aims to complement and enhance ConstructionSkills' existing research by providing an open and regular programme of employer consultation, allowing a reality check for anecdotal reports and enabling employer reactions to be gained on 'hot topics' of the moment. A particular aim was to enable a more comprehensive understanding of actual behavioural issues influencing the decision(s) to train, the route(s) taken and the method(s) used.
- 1.4 To this end a panel approach was adopted. This document reports on the fourth wave of consultation, and focuses specifically on results in Northern Ireland. This consisted of 56 telephone interviews with employers (and 4 with the self-employed) covering the *traditional building sector* (sector 45 within the Standard Industrial Classification (SIC) codes, this sector labelled 'Construction' throughout the report), but also *Professional service firms* falling within the SIC code 74.2 and which includes architectural and engineering activities and quantity surveying.
- 1.5 The sample for the first wave of the research was drawn from a number of sources: the CITB's database of levy and non-levy payers (Great Britain plus Northern Ireland), supplemented by the Experian database (specifically for the Professional service sector). Sample for wave 4 came from those agreeing at wave 1 or wave 2 to take part in further research though excluding some that had taken part in research on apprenticeships, supplemented by sample from the same sources as used for wave 1.

- 1.6 At the UK level, quotas were set by region, size (number of staff employed directly across the UK) and by whether they were in the Construction or Professional service sector.
- 1.7 Results were then weighted to ensure on these variables survey results were representative. The one exception is the self-employed. Because of the vast number of self-employed, if these were weighted to their correct proportions the overall survey results would be completely dominated by the findings among this group. Hence they were given a weight of one, in effect leaving the proportion of self-employed interviews once weighted in the same proportion as they made of the sample. In the report we usually show results among all *employers* (i.e. those currently employing other staff and hence excluding sole traders / the self-employed).
- 1.8 It should be noted that the size by sector weight was applied at the UK level not within each country / region individually.
- 1.9 Where comparable data exists, results in this report are compared with results from earlier waves. These adopted exactly the same methodologies, and fieldwork dates were as follows:
- Wave 1: February 2005
 - Wave 2: September 2005
 - Wave 3: June 2006
 - Wave 4: December 2006.
- 1.10 The management summary follows. After that, the report is divided into a number of chapters:
- The profile of those interviewed
 - Business challenges
 - The extent of Health and Safety training
 - CITB Northern Ireland / CITB-ConstructionSkills grants for training
 - How employers feel the grant should be allocated
 - Satisfaction with training providers
 - Non-UK workers.

Caution in interpretation

- 1.11 It needs to be borne in mind that results presented in this report are based on a relatively low number of interviews (60) and should best be treated as indicative. On a base of 60 interviews, sampling error is approximately +/- 12%, which means that statistically we are 95% confident that the true result lies within 12% of the survey results recorded. Furthermore, results were not weighted to be representative of each country / region individually, hence there is no guarantee that the results presented are fully representative of the sector in Northern Ireland. Hence again some caution is needed with the interpretation of the results.

2 Management Summary

- 2.1 This report presents findings of the fourth wave of research examining construction sector employers' views on a range of learning, training and related issues. The survey consisted of 1,001 telephone interviews with employers, 60 in Northern Ireland. The survey covers Professional service firms (SIC 74.2) as well as the traditional building sector (SIC 45.1).

Business challenges

- 2.2 The main current challenges for employers are the need to increase sales and dealing with bureaucracy, red tape and paperwork (19%). The proportion mentioning the former (26%) is similar to that found in summer 2006, and also to that found across the UK as a whole in the current wave. However, the proportion mentioning dealing with bureaucracy, red tape and paperwork (19%) has increased compared with the previous wave.
- 2.3 Dealing with competition from other employers was mentioned by very few as a challenge in the previous wave (1%), though by one in eight employers in the current wave. Combined with the need to increase sales being the most common challenge, and finding suitable staff being less key this wave (mentioned by just 9% compared with 24% in the summer of 2006), the findings suggest employers are finding current trading conditions relatively challenging.

Health and Safety training

- 2.4 Two in five employers (40%) reported having conducted any training in the last two years which was designed specifically to improve knowledge and understanding of Health and Safety in construction. This was very similar to that found across the UK as a whole (44%).
- 2.5 Size is a key discriminator, and predictably small employers (with between 2 and 10 staff) were the least likely to provide such training (36%). Among those with 11 or more staff nine in ten had provided health and safety training in the last 2 years.
- 2.6 The average out of pocket expenditure on health and safety training per annum among those conducting such training was £1,330, a figure which is a little lower than the UK average (£1,650). Spend increased by company size, from around £600 where 2-9 staff are employed, to £2,000 where 10-24 are employed, increasing to over £20,000 among those with more than 100 staff.

Receipt of grants for training

- 2.7 The allocation of training grants has a very different pattern in Northern Ireland to the rest of the UK. In Northern Ireland more employers receive grants, but the amount of grant received is much lower.
- 2.8 In terms of the proportion receiving training grants, in Northern Ireland 37% of Construction firms had received a training grant from CITB Northern Ireland in the last 12 months, equivalent to 87% of those that train.
- 2.9 As to the typical size of the training grant, in Northern Ireland the average amount received over the last 12 months was £350, and nine in ten receiving any grant put the amount received at under £500 for the year. Predictably results vary by size, with small firms with 2-9 staff receiving grant typically getting just under £250 a year, compared with approximately £650 among those with 10-24 staff, £2,455 where 25-99 are employed, and approximately £6,800 where 100 or more staff are employed. In comparison, the average amount received across the whole of the UK was just under £2,400.
- 2.10 Training grants covered just over half (57%) of the total costs of training on the occasions that they were received. This is very similar to the UK average (52%).
- 2.11 Grants in Northern Ireland were nearly all for CSR cards (49%) or for specialised equipment training such as forklift driving (46%). Across the UK as a whole grants were most often for health and safety training / tests (34%) or training to a formal qualification such as an NVQ or City and Guilds (21%), but grants were rarely received for this in Northern Ireland (7% and 4% respectively).
- 2.12 Overall, half of those receiving grants say they would have carried out exactly the same training without the grant. Most of the remainder trained more than they would otherwise have done (45%) because of the grant. Only 1% said they would not have trained at all without the grant. These results are similar to the UK wide figures.
- 2.13 Spontaneously at least there are no strong reasons for thinking increased grant activity (in scope or size of grant) would stimulate significant increased training activity. The main reasons cited for not training are that staff are fully skilled, not being able to spare the staff time off for training and not being able to find the courses they need. None mentioned the cost or expense of training as the reason for not training.
- 2.14 Furthermore when asked what might stimulate training activity, approaching a third of non-trainers could not think of anything, and the most common factor

would be taking on apprentices or other inexperienced workers (25%) or if it was a legal requirement (24%). Relative to these two factors, cheaper training (8%) or more grant being available (1%) were far less critical.

- 2.15 That said, among those Construction firms not aware of training grants (a base of 10 respondents), almost all (96%) felt access to grants would increase the amount of training they undertake.

Employer views on how grant should be distributed

- 2.16 On average employers in Northern Ireland think two fifths of grant should be spent on apprenticeships and new entrant training, a third on qualifying the workforce, and the remainder split almost equally between management and technical training and short duration training. Employers in Northern Ireland differed little from the rest of the UK in their overall views on the allocation of grant.
- 2.17 When the current ration of allocation was described, three in five employers in Northern Ireland (59%) believe this appropriate, compared with a quarter (28%) feeling it inappropriate (13% were unsure). For all size categories with 10 or more staff (10-24, 25-99, 100-249 and 250+) more employers thought the allocation **in**appropriate than thought it right.
- 2.18 The main sentiment among those feeling the current allocation inappropriate is that more should be spent on new entrant and apprenticeship training, and bringing more people into the industry.
- 2.19 Results on the appropriateness of training grant allocation is less positive than found UK wide where overall three quarters (77%) felt the allocation described to them (different on the mainland to Northern Ireland) was appropriate.

Use of and satisfaction with external training providers

- 2.20 Overall two in five Construction firms that trained had used an FE college over the last 12 months and the same proportion had used TASC (42%, equivalent to 18% of all Construction employers).
- 2.21 Satisfaction with FE providers and TASC is high: all users of FE were satisfied (90% were very satisfied), and for TASC 90% were satisfied (85% were very satisfied). Base sizes are low (11 respondents had used FE providers, and 10 TASC), but results suggest that satisfaction levels (particularly the proportion very satisfied) are higher than found on the mainland.

Non-UK workers

- 2.22 Overall 10% of employers currently employ or have employed over the last 6 months workers who are not a UK citizen or passport holder. This is the same proportion as found in wave 2, though the figure jumped in wave 3 (Summer 2006) to 23%.
- 2.23 Use of non-UK workers increases with size of employer (half those with 25-99 and four fifths of those with 100+ staff currently or have recently employed any non-UK workers) but does not vary between Construction and Professional services firms.
- 2.24 Along with firms in London (14%) those in Northern Ireland were the most likely to use non-UK workers – in all other regions 4% or fewer employers had done so.
- 2.25 Results suggest that the number of non-UK workers is equivalent to 5% of the construction workforce in Northern Ireland (5%), the same figure as found in London (5%). Most of those employing non-UK staff say the numbers of such staff employed have stayed about the same over the last 12 months (78%). However, for all firms with 100 or more staff employing non-UK workers, all said the number had grown in the last 12 months, and a third said the number had grown significantly.
- 2.26 Most of those employing non-UK workers had taken them on in unskilled (79%) positions, though around two in five had also taken on non-UK workers in skilled workers. Very few employers with non-UK workers employed these staff as managers or professionals. Compared with the use of non-UK workers across the UK as a whole, in Northern Ireland there appears to be much more use of such workers for unskilled positions.
- 2.27 Around half of employers with non-UK workers had actively sought to recruit these workers (55%), much higher than found UK wide (19%), suggesting it is often a response to difficulties finding enough suitably skilled staff locally rather than it happening by accident. When asked specifically, two in five admitted that they only really take on non-UK workers because they have difficulty finding the UK workers that they need.

3 The profile of those interviewed

3.1 In this section we briefly discuss the profile of those interviewed for the quantitative survey. This is background information to show both the number of interviews on which results among sub-groups are based, and that the sample is broadly representative of the sector (though noting the point about the weighting of the self-employed made in 1.7).

	Number of interviews	Proportion weighted
<i>Number directly employed UK wide</i>		
Self-employed (one person only)	4	<0.5%
2-9	22	93%
10-24	10	3%
25-99	16	3%
100-249	4	<0.5%
250+	4	<0.5%
Single site organisation	36	92%
Multi site	24	8%
Construction	41	77%
Professional services	19	23%

3.2 The profile is very similar to that found in Northern Ireland in wave 3: most firms employing staff are small (93% have fewer than 10 direct employees across the UK) and most are single site operations (92%). The comparative figures in wave 3 were 89% and 87% respectively.

Labour-only sub-contracting

- 3.3 Firms in the Construction sector were asked if they currently employed any staff on a labour-only sub-contract basis, such as the self-employed or those taken on via an agency. Just under a third (31%) were currently employing labour-only sub-contractors, rising to nine in ten among those with 100 or more direct employees. The figure is similar to that found in the previous wave (35%).

Area of activity

- 3.4 Approximately half of Construction firms were involved in building installation (SIC 45.3) and a quarter were involved in the building of complete structures or parts and civil engineering (SIC 45.2).
- 3.5 The 19 Professional service firms interviewed were spread across a range of activities, most commonly quantity surveying, engineering related scientific and technical consulting activities and architectural activities.
- 3.6 Nearly all firms (86%) are involved in commercial and retail work (such as shops and offices), and around seven in ten are involved in housing repair, maintenance and improvement (71%) and new house building (70%).
- 3.7 Only around one in eight (12%) work on civil engineering projects, though this is much higher (76%) among the very largest employers with 250 or more direct employees across the UK.

4 Key business challenges

- 4.1 It is clearly important that CITB-Northern Ireland and ConstructionSkills understand the key challenges that businesses in its sector face so that communication can be orientated towards issues that matter to employers. It is also key to see the extent to which the core areas of CITB Northern Ireland and ConstructionSkills, namely learning, training and skills, are seen as critical or not to employers themselves, this an indication of how easy or difficult it will be to get key messages across. To this end respondents were asked what the key challenges were facing their business, this a spontaneous question.
- 4.2 Results are presented in the following table, which shows in the middle column of data responses given by more than one in twenty of those employing staff (i.e. excluding the small number of self-employed respondents). The first column shows comparable figures from the last wave. The final column shows comparative UK figures for the current wave of research.

Main key challenges (spontaneous)			
<i>Base: all employing staff</i>	Wave 3 Northern Ireland (62) %	Wave 4 Northern Ireland (56) %	Wave 4 UK (930) %
Need to increase sales	24	26	19
Bureaucracy / dealing with red tape / paperwork / keeping up with legislation	2	19	15
Competition from other businesses	-	13	7
Finding staff / suitably skilled staff	26	9	15
Getting finance to expand	-	6	5
Keeping up with technology	-	6	1
No particular challenges	23	21	21

- 4.3 The main current challenges for employers are the need to increase sales (26%) and dealing with bureaucracy, red tape and paperwork (19%). The proportion mentioning the former is similar both to that found in wave 3 in Northern Ireland, and also to that found across the UK as a whole in the current wave. Dealing with bureaucracy, red tape and paperwork was mentioned by very few previously (2%), and it will be interesting to see if this continues to be seen as an issue for employers.
- 4.4 Dealing with competition from other employers was mentioned by very few employers in the previous wave (1%), though by one in eight employers in the current wave. Combined with the need to increase sales being the most common challenge, and finding suitable staff being less key this wave (mentioned by just 9% compared with 24% in the summer of 2006), findings suggest employers are finding trading conditions relatively challenging.
- 4.5 Base sizes are relatively low by sub-group, and hence findings are best treated as indicative, but results suggest that the key challenge for large firms with 100 or more staff is finding staff (73%). There are also differences between the traditional building sector and Professional services firms: increasing sales was more likely to be mentioned by those providing Professional services (43% compared with 21%), as was facing competition (35% compared with 7% among Construction firms). On the other hand the issue of red tape and paperwork was mainly an issue for Construction firms, and was mentioned by one in four such firms.
- 4.6 As in summer 2006, while a significant number of Construction firms felt they face no particular challenges (27%), almost no Professional service firms answered in this way (1%).

5 The extent of Health and Safety training

5.1 In this chapter we examine the proportion of firms undertaking Health and Safety training, discuss the average 'out of pocket' expenditure and also examine why employers say they do not conduct Health and Safety training. For the study conducted in the rest of the UK this was a preliminary to discussing the Site Management Safety Training Scheme (SMSTS), but this was not covered for employers in Northern Ireland.

Health and Safety training in the last 2 years

5.2 Two in five employers (40%) reported having conducted any training in the last two years for direct employees or labour-only sub-contractors which was designed specifically to improve knowledge and understanding of Health and Safety in construction. This was very similar to that found across the UK as a whole (44%).

5.3 Size is a key discriminator, and predictably small employers (with between 2 and 10 staff) are the least likely to provide such training (36%). Among those with 11 or more staff nine in ten had provided health and safety training in the last 2 years.

5.4 As found in the UK as a whole, Professional service firms were more likely to report providing Health and Safety training (60% v. 34%).

Annual expenditure on Health and Safety training

- 5.5 Those that had undertaken any Health and Safety training were asked to estimate their annual out of pocket expenditure on Health and Safety training in the past 12 months, this explained as covering expenditure on courses and travel but not staff time or salaries.
- 5.6 For half their annual expenditure was relatively low, at between £100 to £249. The average expenditure was £1,330. This varied by company size, as follows (again because of low base sizes these are best treated as indicative). Figures are based on employers providing any Health and Safety training, and have been rounded to the nearest £25.
- 2-9 staff: £600
 - 10-24 staff: £2,000
 - 25-99 staff: £4,025
 - 100+ staff: £21,100.
- 5.7 Results are broadly similar to those found UK wide, where average annual out of pocket expenditure on Health and Safety training among those undertaking such training is £1,650.

Reasons for not undertaking Health and Safety training

- 5.8 Fifteen respondents had not provided any Health and Safety training in the last 2 years. The main reasons for this appear to be a general feeling that there is no need (34%), some also saying specifically all staff are fully trained in health and safety (9%), and others that their clients provide health and safety training for them (13%). However, some put it down to a lack of time or being short staffed (25%).

6 CITB Northern Ireland grants for training

- 6.1 In this chapter we look at the proportion of employers that say they have received any grants from CITB Northern Ireland in the past 12 months to help fund the costs of training, the amount received and the proportion of their training costs this represents, and critically the effect the grant had on their training activity.

Proportion of employers receiving training grants

- 6.2 Overall, 37% of Construction firms had received a training grant from CITB Northern Ireland in the last 12 months.
- 6.3 Looking just at those that provided any training for staff in the last 12 months, four in five (81%) received grants.
- 6.4 These figures are much higher than found across the UK as a whole, where one in nine employers (11%) received training grants from ConstructionSkills / CITB Northern Ireland, representing just under a quarter of those that train (23%). This indicates very different use of grants in Northern Ireland compared with the mainland. In the North West of England, where employers were the least likely to receive grants, just 4% of employers, or one in ten of those that trained, had received grants in the last 12 months.

The amount of grant received

- 6.5 In Northern Ireland the average grant received over the last 12 months was £350, and nine in ten receiving any grant put the amount received at under £500 for the year. Predictably results vary by size, with small firms with 2-9 staff receiving grant typically getting just under £250 a year, compared with approximately £650 among those with 10-24 staff, £2,455 where 25-99 are employed, and approximately £6,800 where 100 or more staff are employed.
- 6.6 Results suggest that compared with the mainland, CITB Northern Ireland gives out more, but smaller grants. The average amount received across the whole of the UK was just under £2,400, and overall three in ten received less than £500.

- 6.7 Base sizes by region / country are relatively low, and caution is needed in interpreting the results, but the findings suggest that policy on the allocation of grants differ widely by geography. We have seen that employers in Northern Ireland are much more likely to report receiving grant than elsewhere. In Northern Ireland, Wales, Scotland and Yorkshire and Humberside at least three in four of those receiving grants benefited to the tune of less than £1,000.
- 6.8 By contrast in the following regions very few employers receiving grants reported getting less than £1,000: London (6%), North West (8%), East Midlands (11%), South East (14%), West Midlands (13%).
- 6.9 There was an almost even split between training grants covering around a third of the total training costs on the occasions that they are received (45%), or them covering over four fifths of the costs (44%). On average, training grants were described as covering just over half (57%) of the total costs of training on the occasions that they were received.
- 6.10 This is very similar to the UK average, where grants cover just over half (52%) of the total costs of training on the occasions that they were received.
- 6.11 Grants in Northern Ireland were nearly all for CSR cards (49%) or for specialised equipment training such as forklift driving (46%). Across the UK as a whole grants were most often for health and safety training / tests (34%) or training to a formal qualification such as an NVQ or City and Guilds (21%), but grants were rarely received for this in Northern Ireland (7% and 4% respectively).
- 6.12 Perhaps the critical question in relation to the grant is what effect or additionality it has i.e. would the employer have carried out the same training anyway. Overall, half say they would have carried out exactly the same training without the grant, almost exactly the proportion found UK wide (47%). Most of the remainder trained more than they would otherwise have done (45%). Only 1% said they would not have trained at all without the grant, similar to the UK wide figure (5%).
- 6.13 There was no clear pattern by size in terms of this additionality.

Non-trainers

- 6.14 A key issue in relation to CITB Northern Ireland's grants for training is whether non-trainers are aware of them, and if not whether they would serve to stimulate training in these companies. First we examine the reasons why employers had not trained over the last 12 months and what they think might serve to stimulate training activity.

Main reasons for not training	
<i>Base: all not training in the last 12 months (21)</i>	%
All staff fully skilled / no need to train in the last 12 months	31
Can't spare the time	25
Can't find courses relevant to us	20
Other	17
No particular reason	13

- 6.15 The main reasons for not training are staff being felt to be fully skilled and hence their having no perceived need to train over the last 12 months, not being able to spare the time and not being able to find the courses they need. A lack of time and suitable courses are much more common reasons for not training among Construction firms. Among Professional service firms not training (a low base of 7 respondents, hence much caution is needed), reasons were fairly evenly split between being fully skilled or there being no particular reason for not training.
- 6.16 None mentioned the cost or expense of training as the reason for not training, suggesting at a top line level that the availability of grants or subsidies will influence a relatively small minority of non-trainers to take up training.
- 6.17 The following table shows results for what employers say would stimulate or increase training activity.

What would stimulate or increase training activity	
<i>Base: all not training in the last 12 months (21)</i>	%
If we took on apprentices / inexperienced staff	25
If a legal requirement	24
If training was cheaper	8
If someone could advise us on our training needs	6
If there were more grants available	1
Other	7
Nothing / don't know	29

- 6.18 Approaching a third of non-trainers could not think of anything that would stimulate them to start training. Confirming the main reason for not training as staff being viewed as fully skilled, the most common spur to training would be taking on apprentices or other inexperienced workers (25%). A similar proportion could only see themselves training if this was a legal requirement (24%).
- 6.19 Relative to these two factors, cheaper training is much less of an issue. Overall one in twelve non-trainers mentioned this issue, these all small firms with 2-9 staff. Very few though (1%) spontaneously mentioned more grant being available as likely to stimulate more training. This is lower than found UK wide (7%), possibly reflecting the seeming wider availability of grants in Northern Ireland.

Awareness of and application for grants (non-receivers)

- 6.20 Approximately a quarter (27%) of non-grant receiving Construction firms (covering both those that had not trained at all in the last 12 months or had trained but not received grants) were not aware that grants were available from CITB Northern Ireland to help cover the costs of training. There was no particular pattern by size.
- 6.21 Non-trainers were more likely to be aware that training grants exist than those that had undertaken training in the last 12 month but who had not received grants (77% v. 43%).
- 6.22 None of the four Construction respondents that had trained in the last 12 months who were aware of grants but had not received any had actually applied for any grant from CITB Northern Ireland. This appeared to be a mix of reasons, typically that it was considered more hassle than it is worth or not thinking that grants were available for the training that they were conducting.
- 6.23 Among those Construction firms not aware of grants (a base of 10 respondents), almost all (96%) felt grants would increase the amount of training they undertake.

7 Employers' views on allocation of training grants

7.1 In this chapter we examine how employers think CITB Northern Ireland training grants should be allocated. Respondents were informed grants are distributed between the four main areas (training new entrants; qualifying the existing workforce via on-site Assessment and Training and health and safety tests; management and technical training; short duration training) and asked what percentage of grants should go to each. Later they were told what the approximate allocation is and asked if they thought it broadly appropriate. The actual allocation differs between Great Britain and Northern Ireland and is approximately as follows:

Approximate allocation of training grants by CITB-ConstructionSkills / CITB Northern Ireland		
	Great Britain	Northern Ireland
New entrant training	50%	30%
Short duration	25%	40%
Qualifying the workforce via On-site Assessment and Training, and Health and Safety tests	12.5%	15%
Management and technical training	12.5%	10%
Business improvement tools like Investors in People	-	5%

- 7.2 Responses to how employers felt training grant should be split are shown in the following table, which is based on those giving answers at these questions (some felt unable to answer). Responses of less than 100% were allowed in that employers could feel grant should go on other areas of training. Results are summarised on the following table.

How employers think grant should be allocated		
	All UK	Northern Ireland
<i>Base: all answering</i>	837	52
New entrant training	46%	41%
Qualifying the existing workforce	27%	32%
Management and technical training	14%	15%
Short duration	11%	13%

- 7.3 On average employers in Northern Ireland think two fifths of grant should be spent on apprenticeships and new entrant training, a third on qualifying the workforce, and the remainder split almost equally between management and technical training and short duration training.
- 7.4 As can be seen, employers in Northern Ireland differed little from the rest of the UK in their overall views on the areas where grant should be allocated.
- 7.5 Low base sizes limit the scope for sub-group analysis, but results suggest that large employers (with 100 plus staff) favour a somewhat higher allocation to new entrant training (c half of all grant) and very little to short duration training. Differences between Professional service and Construction firms were relatively slight.
- 7.6 Comparing the findings with those presented on the first table on the approximate way grant is allocated in Northern Ireland shows support for more allocation of grant than currently to apprenticeship and new entrant training and to qualifying the existing workforce, and less on short duration training.
- 7.7 Employers were then told the approximate allocations (this separately for Great Britain and those based in Northern Ireland) and asked if they felt they were broadly appropriate.

- 7.8 Three in five employers in Northern Ireland (59%) believe the current allocation appropriate, compared with a quarter (28%) feeling them inappropriate (13% were unsure). For all size categories with 10 or more staff (10-24, 25-99, 100-249 and 250+) more employers thought the allocation **in**appropriate than thought it right.
- 7.9 The main sentiment among those feeling the current allocation inappropriate is that more should be spent on new entrant and apprenticeship training, and bringing more people into the industry.
- 7.10 Results here are less positive than found UK wide where overall three quarters felt the allocation described to them was appropriate (77% - and 15% thought the allocation inappropriate.

8 Satisfaction with external training providers

- 8.1 Construction sector employers that had provided training over the last 12 months were asked whether they had used FE colleges and then whether they had used either the National Construction College (NCC) if based in Great Britain or the Training and Assessment Services for Construction (TASC) if in Northern Ireland to deliver any of this training, and if so their satisfaction with this training.
- 8.2 Overall two in five Construction firms that train had used an FE college over the last 12 months and the same proportion had used TASC (42%, equivalent to 18% of all Construction employers). There was no particular pattern by size of firm for usage of FE or TASC.
- 8.3 Satisfaction with FE providers and TASC is high: all users of FE were satisfied (90% were very satisfied), and for TASC 90% were satisfied (85% were very satisfied). Base sizes are low (11 respondents had used FE providers, and 10 TASC), but results suggest that satisfaction levels (particularly the proportion very satisfied) are higher than found on the mainland.
- 8.4 Nearly all the positive comments about TASC training relate to the hands on practical nature of the course.
- 8.5 The main reasons for not using TASC were the feeling that course were not relevant to their area of work (67%), but around a fifth of non-users said they don't know enough about TASC or what they provide.

9 Overseas (non-UK citizen) workers

- 9.1 A characteristic of the construction industry is the relative high degree of mobility of its workforce and the extent to which workers are drawn from around and indeed outside the UK. Mobility clearly has implications for the organisation and funding of training, and the use of overseas workers in particular has many potential implications for the industry, in training and other areas. In this wave, a relatively small number of questions were asked on the issue of non-UK workers, these covering the number and main occupations where non-UK workers are employed, the reason why these workers are taken on, how they have been recruited, and attitudes to employing non-UK workers.

The incidence of non-UK workers and the numbers employed

- 9.2 Overall 10% of employers currently employ or have employed over the last 6 months a worker who is not a UK citizen or passport holder. This is the same proportion as found in wave 2, though the figure jumped in wave 3 to 23%.
- 9.3 Use of non-UK workers increases with size of employer: approximately a third of those with 10-24 staff, half those with 25-99 and four fifths of those with 100+ staff currently or had recently employed any non-UK workers. However, the likelihood of employing non-UK workers did not differ between Construction and Professional services firms.
- 9.4 Along with firms in London (14%) those in Northern Ireland were the most likely to use non-UK workers – in all other regions 4% or fewer employers had done so.
- 9.5 Results suggest that the number of non-UK workers is equivalent to 5% of the workforce in Northern Ireland (5%), the same figure as found in London (5%). In Wales and the East Midlands the figure was less than half a per cent.
- 9.6 Most of those employing non-UK staff say the numbers of such staff employed have stayed about the same over the last 12 months (78%). However, for all firms with 100 or more staff employing non-UK workers, all said the number had grown in the last 12 months, and a third said the number had grown significantly.
- 9.7 Most of those employing non-UK workers had taken them on in unskilled (79%) positions, though around two in five had also taken on non-UK workers in skilled workers. Very few employers with non-UK workers employed these staff as managers or professionals.

- 9.8 Compared with the use of non-UK workers across the UK as a whole, in Northern Ireland there appears to be much more use of such workers for unskilled positions.

Whether actively sought to recruit non-UK workers

- 9.9 Around half of employers with non-UK workers had actively sought to recruit these workers (55%), much higher than found UK wide (19%), suggesting it is often a response to difficulties finding enough suitably skilled staff locally rather than it happening by accident. When asked specifically, two in five admitted that they only really take on non-UK workers because they have difficulty finding the UK workers that they need.