IFF Research

Employer Attitudes and Motivations to Learning and Training (Wave 13)

Prepared for **CITB-ConstructionSkills NI**

By IFF Research

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1 Introduction

1.1 As an Industry Training Board and Sector Skills Council CITB-ConstructionSkills NI's role is to encourage the adequate training of those employed or intending to be employed in the construction industry, and to improve the skills and productivity of the industry in Northern Ireland. This is achieved through providing advice, courses and grants for training to help construction companies improve their skills to increase their competitiveness. This requires that CITB-ConstructionSkills NI has a thorough understanding of the needs and practices of the industry relating to skill needs, learning and training.

1.2 CITB has a varied programme of on-going research activity to meet these aims. The current research project seeks to complement and enhance CITB's existing research by providing an open and regular programme of employer consultation, allowing a reality check on anecdotal information, and enabling employer reactions to be gained on 'hot topics' of the moment.

1.3 This document reports on the thirteenth wave of consultation focusing specifically on results from Northern Ireland. This involved 118 telephone interviews with employers (of whom four were working as sole traders i.e. had no direct employees other than the respondent) operating within the traditional building sector (referred to as Construction employers in the report – unlike most previous waves the Professional Services sector was not included in this wave).

1.4 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 (Northern Ireland), supplemented by Experian's employer database. The sample for wave 13 came largely from those agreeing at previous waves to take part in further research supplemented with fresh sample from the same sources as described above.

1.5 At the UK level quotas were set by region / country, and size (number of staff employed directly across the UK). Results were then weighted to ensure that 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 weighted to a negligible proportion of the total sample (1%) and in effect where we report overall results these are based on all employers (i.e. those currently employing other staff and hence excluding sole traders / the self-employed).

1.6 Where data exists, results in this report are compared with results from earlier waves. These previous waves adopted exactly the same methodology (though, except for wave 9, the previous waves included Professional Services firms). Fieldwork dates have been as follows (this lists the main month of quantitative fieldwork):

- Wave 1: February 2005
- Wave 2: September 2005
- Wave 3: June 2006
- Wave 4: December 2006
- Wave 5: August 2007
- Wave 6: March 2008
- Wave 7: July 2008
- Wave 8: March 2009
- Wave 9: November 2009
- Wave 10: August 2010
- Wave 11: August 2011
- Wave 12: June 2012
- Wave 13: September 2013

1.7 The management summary follows. After that, the report is divided into a number of chapters:

- The profile of those interviewed
- Business challenges and priorities
- The economic downturn and how employers have responded
- Apprentices
- Training and Qualifications
- Non-UK workers

Caution in interpretation

1.8 Results presented in this report are based on a relatively small number of interviews (118) and should best be treated as indicative. On a base of 118 interviews, sampling error, in the worst case scenario from a statistical reliability angle of a survey result of 50%, is approximately +/- 9.0%, which means that statistically we are 95% confident that the true result lies within 9.0% of the reported survey result. In the case of a survey result of 25% or 75% the sampling error falls to +/- 7.8%. 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 13th wave of research examining employers' views on a range of learning, training, skills and related issues. The quantitative element on which this report concentrates consisted of 118 telephone interviews conducted in September 2013 with employers and the self-employed across Northern Ireland operating within the traditional building ('Construction') sector.

Business challenges

2.2 The most common key business challenge amongst employers in Northern Ireland was the need to increase sales (53%). Although still high, the proportion mentioning this as a key challenge has fallen compared with recent waves (76% in Wave 11 conducted in 2011 and 60% in Wave 12 conducted in 2012). Furthermore, one in ten (10%) spontaneously mentioned dealing with the recession as a key business challenge, again lower than recent waves (26% in Wave 11 and 21% in Wave 12) suggesting an overall improvement in the economic outlook. Slow or late payments appears to be a problem on the rise, up to 28% compared with 10% in Wave 11 and 18% in Wave. When prompted, three-quarters of firms considered slow payment to be an issue that had worsened over the last two years.

The impact of and response to the economic downturn

2.3 Although there are *tentative* signs of a relative improvement in the economic outlook, these should not be exaggerated, and results suggest consolidation as opposed to widespread improvements:

- Many more employers in Northern Ireland indicated their turnover has fallen over the last 12 months (38%) than say it has increased (14%) – though in 2011 and 2012 many more reported a decrease (63% in each wave)
- More expected their turnover to fall in the next 12 months (27%) than expected an increase (18%) – again the relatively encouraging finding is that in Waves 11 and 12 close to half of employers expected a decrease in the coming 12 months. Optimism for the coming 12 months was lower in Northern Ireland than the rest of the UK (UK-wide 34% of employers anticipated increased sales).
- Almost two thirds (64%) of employers in Northern Ireland reported that their profit levels were lower than they were in the period immediately before the recession.
- Half of employers in Northern Ireland (52%) did not feel the worst of the economic downturn was over (though the proportion who thought the worst was over (31%) has increased compared with previous waves (6% in Wave 11 and 13% in Wave 12)).

Apprentices

2.4 A third of employers in Northern Ireland indicated that they had taken on apprentices in the previous 12 months (32%) – in nearly all cases this was a single apprentice – and a third employed any apprentices within their organisation at the time of the interview.

2.5 Most commonly, employers chose not to recruit apprentices because of a general lack of work or recruitment at any level (64%), indicating the impact that economic conditions are having on the ability of employers to run apprenticeship schemes. There certainly was not felt to be an issue with the supply of potential apprentices: 70% of all employers in Northern Ireland felt it would be easy to find a suitable applicant, significantly higher than the UK-wide proportion (57%). Around three in five employers (62%) felt there were more people wanting to start an apprenticeship than positions available. That it is something of a seller's market where employers have plenty of choice is confirmed by the fact that most employers that have recently taken on any apprentices rated their recruits' skills and attributes as good or very good against what they would expect of someone at this level (77%).

2.6 Overall 20% of firms think it at least quite likely that they will take on apprentices in the next 12 months, though only 3% said this was definite. Again, the most common explanation for not intending to take on apprentices is economic reasons, with over three-quarters (77%) citing business uncertainty as the reason.

Training and Qualifications

2.7 Over three-quarters of employers (77%) provided training to their employees in the previous 12 months. Two thirds of all employers had used an external provider or consultant (66%), though it was also quite common for their own staff to provide training, either through planned sessions (34%) or more informal training (24%). Use of online training was relatively uncommon (12%). E-learning appeals to relative few employers that train (15%, compared with half thinking it unappealing): the reasons given relate to staff not being confident on computers, the employer not being able to monitor an assess progress, and believing training needs to be hands on and require input from a trainer.

2.8 Those using external providers most often used private providers (83%), followed by FE colleges (29%). Around a fifth of those using external providers had used CITB-ConstructionSkills NI and a similar proportion had used an Employer Federation in partnership with CITB-ConstructionSkills NI. Quality and reputation is the most important criteria in choosing an external training provider (65% say this is very important), followed by the ability to tailor the training to the employer's needs (53% say this is very important). Compared to these two factors costs, being located nearby, flexibility and how soon a provider can start the training are more secondary factors (though still very important to around 40%-50% of those using external providers).

2.9 Around half of employers in Northern Ireland that provided training in the last 12 months said at least some of this training was intended to lead to formal qualifications (46%, lower than found among employers in Great Britain (56%)). Nevertheless still seven in ten training employers in Northern Ireland considered it either vital (29%) or very important (40%) for their staff to obtain a qualification, accreditation or industry-recognised certificate from their training. Only 2% felt that qualifications and accreditation were not important outcomes of training.

2.10 There were mixed views on the usefulness of unaccredited certificates compared with the 'official' qualifications for the same sort of skill: a third of those providing training (34%) agreed that these unaccredited certificates could be as or more useful, slightly more (45%) thought the opposite, and quite a large proportion (20%) felt unable to give a view one way or the other (presumably on the basis that they had no experience of these unaccredited certificates).

2.11 Nearly all employers that trained had provided training to develop health, safety and/or environmental skills (95%) and four-fifths had provided technical, trade specific training (80%). In comparison a fifth of trainers had provided training for their staff aimed at improving non-trade specific skills such as sales, customer handling, management or IT (20%, lower than the UK-wide figure of 32%).

2.12 By far the most common reasons why non-trade specific training was not provided by firms was that they considered these other areas such as health and safety and technical training as more of a priority (88%) or their staff had no skill needs in areas such as sales, customer handling, IT etc. (81%). Far fewer (also) cited the cost of non-technical training (22%), not being sure who provided his training (21%) or because they have no good local suppliers of this training (12%). This suggests there are relatively few gaps in the market place for this kind of training.

2.13 The main types of non-trade specific training provided were aimed at developing either basic or advanced IT skills (37% and 31% respectively). Despite sales or customer services being mentioned as the most common type of non-trade specific training in the UK overall (29%), only 2% in Northern Ireland mentioned this as an area which this kind of training had sought to develop.

2.14 A quarter of employers (24%) said they were likely to undertake this broader, non-trade specific type of training over the next 2-3 years. Predictably this was far higher among those who had already funded or arranged such training (89%). The most likely specific areas for this training were in management-related skills (53%), basic IT skills (29%), supervisory skills (16%), general skills in construction (15%) and sales and customer service skills (13%). Most of these employers (80%) felt it would be easy to find suitable suppliers to provide this training, leaving one in five of these employers who felt it would be difficult (equivalent to 5% of all employers).

Non-UK workers

2.15 Only 3% of employers in Northern Ireland had hired staff over the last 12 months who were non-UK passport holders, less than the proportion UK-wide, and lower than found in Northern Ireland in Wave 12 (both 6%).

2.16 Reflecting the fact that none of those interviewed had recruited any Romanian or Bulgarian workers in the last 12 months, when all respondents were asked what impact they felt the removal of work restrictions for Romanian and Bulgarian citizens in 2014 would have on their business, by far the most common response was that it would have no impact at all (84%). More of the remaining respondents felt that the impact would be negative than positive (5% vs. 2% respectively). In comparison construction employers in Great Britain were far more likely to anticipate negative consequences (27%; just 2% thought the changes would have a positive impact).

3 The profile of those interviewed

3.1 In this section we briefly discuss the profile of the 118 employers and self-employed / sole traders interviewed for the quantitative survey. This is background information to show the number of interviews on which results among sub-groups are based, and to show that the sample is broadly representative of the sector (though noting the point about the weighting of the self-employed made in 1.5). In the following table the first column of data shows the number of interviews conducted, while the second column shows the weighted profile.

Sample profile: size of firm		
	Number of interviews	**Proportion weighted**
Number directly employed UK wide		
Self-employed (one direct employee only)	4	<1%
2-9	56	79%
10-24	23	12%
25-99	26	8%
100+	9	<1%

3.2 Clearly most firms employing staff are small, with four-fifths employing fewer than 10 direct employees across the UK. A large proportion were single site organisations (83%).

Labour only sub-contracting

3.3 Construction firms were asked how many staff they currently employed on a labour-only sub-contract basis, such as the self-employed or those taken on via an agency. Just over half were employing labour-only sub-contractors at the time of the survey (54%, in line with the UK-wide figure of 56%), higher than the figure found in the previous two waves in Northern Ireland (48% in wave 10, 45% in wave 11 and 40% in wave 12).

The client base

3.4 Three-quarters of firms in Northern Ireland (78%) worked as sub-contractors for other construction or engineering firms, which was significantly higher than the UK wide figure of 65%. The majority also had clients from the general public (73%), other commercial clients (69%) and government or public sector clients (54%). When asked for their main client type, there was an almost equal split between the four categories.

Membership of a trade body or federation

3.5 Just over three-fifths of firms are members of a federation or trade body (63%), higher than the UK average (53%).

4 Key business challenges and priorities

4.1 It is important that CITB-ConstructionSkills NI understands and monitors the key challenges that businesses in the sector face so that policy can be designed and communicated in a way that will have maximum effect. How the industry currently perceives any challenges associated with learning, training and skills will also provide a backdrop to how difficult it will be to promote training activity and skills development. Results to this spontaneous (non-prompted) question are shown on the following table, with challenges ranked in descending order (for employers in Northern Ireland).

Main key challenges (spontaneous)

	Northern Ireland			UK
Base: all Construction sector employers	Wave 11 Aug 11 (98) %	Wave 12 June 12 (83) %	Wave 13 Sept 13 (118) %	Wave 13 Sept 13 (1,500) %
Need to increase sales	76	60	53	43
Clients slow to pay	10	18	28	15
Need to increase profitability	4	9	12	10
Dealing with the recession / downturn	26	21	10	18
Competition	1	4	9	12
Dealing with legislation and red tape	1	5	9	7
Getting finance to expand	6	21	7	8
Rising costs of materials	11	14	4	7
Finding suitably skilled staff	1	2	3	6
No particular challenges	1	-	3	7
Cashflow / getting paid	1	6	2	5

'*' = > 0% but less than 0.5%; '-' = 0%.

4.2 The main challenge was the need to increase sales, mentioned by around half of employers in Northern Ireland (53%). This is lower than found in the previous two waves (76% in wave 11 and 60% in wave 12), and shows signs of a recovery. Nevertheless, this remains lower than in the UK as a whole, where just over two-fifths of employers (43%) mentioned the need to increase sales as a key business challenge.

4.3 The more positive outlook in 2013 compared to the previous few years was reinforced by the continuing fall in the number employers who felt dealing with the recession was a key business challenge (mentioned by 26% in wave 11, 21% in wave 12 but just 10% in this wave). (It is important to note that the more positive picture compared with previous waves is *relative* – as we see in the next chapter there are still many more employers that say their turnover has decreased in the previous 12 months than say it has increased, it is just that the proportion that say it has decreased has fallen).

4.4 The amount of time it takes for clients to pay businesses continued to rise as a key business challenge. Three in ten employers in Northern Ireland (28%) spontaneously mentioned this as a challenge, considerably higher than the one in ten (10%) who had mentioned this in Wave 11, and much higher than found UK-wide this wave (15%). When prompted, half of employers agreed slow or late payment was a problem (48%). Overall 18% described it as a *very serious* problem: this was much higher among firms with 2-9 staff (21%) than those with 10-99 staff (8%) or 100+ staff (none described late payment as a very serious problem). In addition, almost three-quarters of all employers (73%) considered this issue to have got worse over the last two years, again much higher than found UK-wide (51%).

4.5 Although rising slightly from previous waves, finding suitably skilled staff was still not considered a common business challenge amongst respondents (3%).

5 The Economic Downturn

5.1 In this chapter we discuss how employers have responded to the downturn in terms of staff numbers, recruitment, and training activity. We also explore the degree to which firms believe the worst of the recession is over.

Profit and turnover

5.2 Respondents were asked how their profit levels compared with their pre-recession levels in 2008. Almost two-thirds of employers in Northern Ireland (64%) indicated their profit levels were now either lower or significantly lower than they were in the period immediately before the recession. This was slightly higher than recorded UK-wide (58%). In line with the UK as a whole, only 12% of respondents felt that their profit levels had risen over this period.

5.3 Employers were also asked whether their annual turnover had increased, decreased or stayed the same over the last 12 months. More employers had seen a decrease in turnover (38%) than an increase (14%), with approaching half (44%) saying it had remained at about the same level. Despite what may appear to be rather negative data, the proportion has improved from the 63% who reported a decrease in turnover in both Wave 11 and Wave 12.

Turnover			
	Wave 11	Wave 12	**Wave 13**
Change in annual turnover over the previous 12 months:			
Increase	4%	17%	**14%**
Stay the same	31%	16%	**44%**
Decrease	63%	63%	**38%**
Expected change in annual turnover over the next 12 months			
Increase	5%	15%	**18%**
Stay the same	47%	32%	**53%**
Decrease	44%	52%	**27%**

5.4 Just over half of employers (53%) expected their turnover to stay the same over the next 12 months. Optimism in terms of increased turnover was lower in Northern Ireland than in the UK as a whole: 18% of employers in Northern Ireland expected an increase in turnover compared to 34% among all UK employers. Although the proportion expecting an increase (18%) is little changed compared with Wave 12 (15%), far fewer expect a decrease (27% compared with 52% in 2012), hence the results suggest something of a period of expected consolidation.

Operating levels

5.5 Around two in five (42%) employers in Northern Ireland felt that their business was operating below full capacity, more than the proportion found UK-wide (34%). Only 8% felt they had more work than they could comfortably handle. On average, Northern Ireland respondents suggested they were operating at 77% of their full capacity, again lower than the UK average (84%). Results suggest employers will be able to handle any increase in demand over the short term.

The end of the downturn and opportunities for growth

5.6 Respondents were asked whether they thought the worst of the economic downturn was over. In contrast to the UK average (49% feeling the worst over compared with 39% who felt it was not), more employers in Northern Ireland felt the worst of the recession was **not** yet over than thought it was (52% vs. 31% respectively). Nevertheless, matching other findings, the proportion of optimistic employers in Northern Ireland has risen sharply from 2011 and 2012.

Do you feel the worst of the economic downturn is over?			
Base: all construction	Wave 11	Wave 12	**Wave 13**
Yes	6%	13%	**31%**
No	93%	79%	**52%**

5.7 There was not one particular type of work that stood out as an area of expected growth within the industry. The private sector was the most common type of work mentioned as a possible area where growth could occur (15%), followed by renewable energy (10%). Around half of respondents (53%) were unable to suggest any types of work they thought would grow over the next year or so.

5.8 Employers were also asked for their spontaneous views on what could be done to stimulate growth in the construction industry in the short to medium term. The most common responses were: increased government spending in the construction sector (33%), banks lending more in mortgages (19%), banks lending more to construction firms (19%), and encouraging more new house building (16%).

Competition

5.9 Respondents were asked about the current level of competition between construction firms in terms of winning new customers and new business. Four in five employers in Northern Ireland (81%) felt the level of competition was high or very high, very similar to the UK level (77%). That said, more employers in Northern Ireland than across the UK as a whole described the level of competition as ‘very high’ (63% vs. 42% respectively).

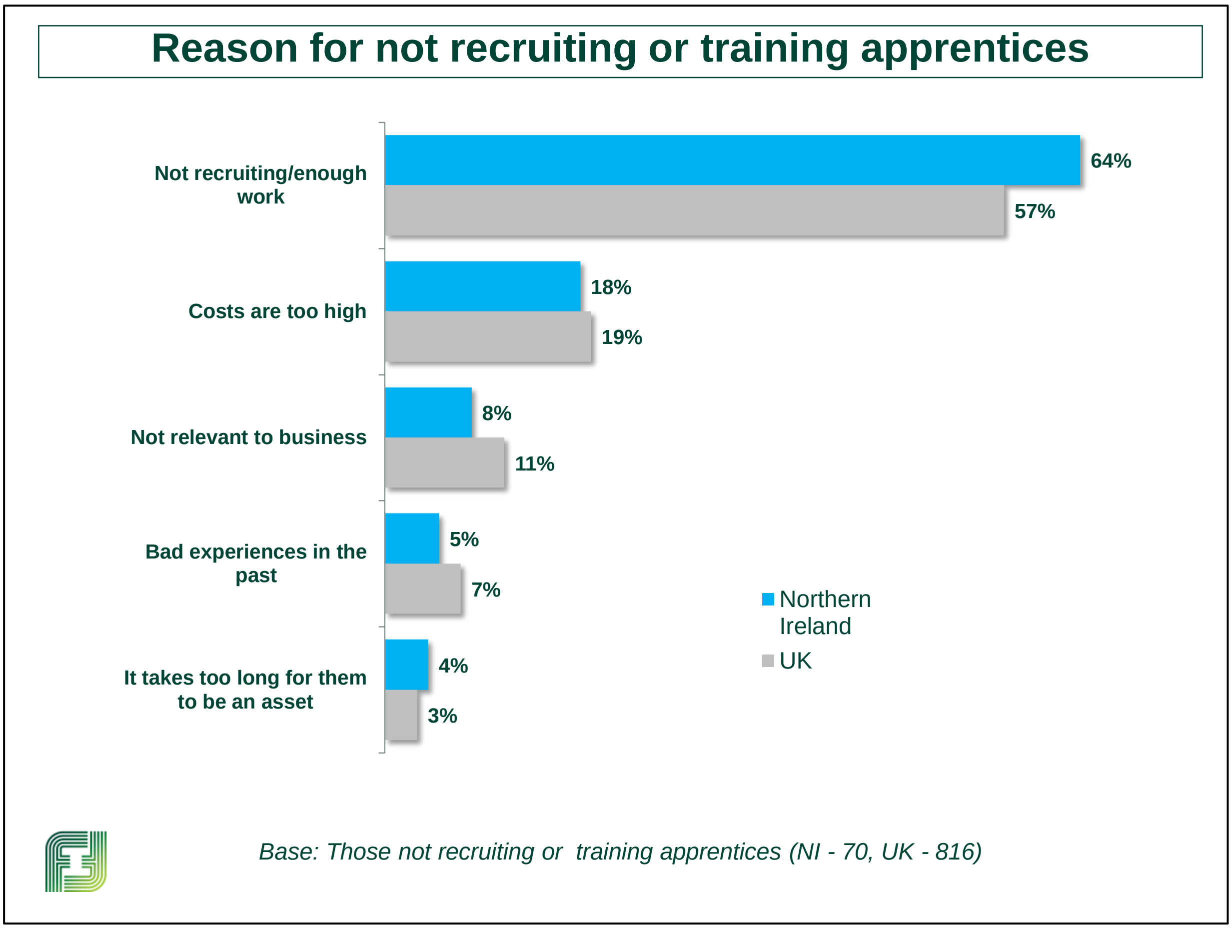
6 Apprentices

6.1 This chapter explores issues surrounding current and future recruitment, skills and supply of apprentices within Construction sector firms. Comparisons are made previous waves where possible.

6.2 A third of firms in Northern Ireland (32%) had taken on any apprentices over the previous 12 months, slightly higher than found in wave 12 (24%), and also higher than found UK-wide in 2013 (20%). In nearly all cases a single apprentice had been taken on.

6.3 Employment of apprentices followed a similar pattern: a third of employers (33%) in Northern Ireland employed apprentices at the time of the interview, higher than the UK average of 23%. Most employers were employing the same number of apprentices as two years ago (68%), though more said the number had fallen over the last two years (23%) than said it had increased (8%).

6.4 By far the most common reason for not recruiting or training apprentices was a lack of general recruitment within the business or a lack of work (64%). This was also the main reason amongst all UK respondents. More secondary reasons were the costs of taking on and training apprentices being too high and not seeing apprentice positions as relevant to their business.



6.5 Most employers in Northern Ireland without any apprentices felt it would be easy to find suitable applicants. Seven in ten thought it would be very (22%) or quite easy (49%), much higher than found UK wide (57%). Confirming high levels of interest from potential apprentices, three-fifths of employers in Northern Ireland felt there were more people wanting to do apprenticeships in Construction than there are places available (61%). This is despite the fact that 45% of employers in Northern Ireland felt that the number of young people wanting to start an apprentice had decreased over the last 2-3 years: clearly the results suggest oversupply, but less so than 2-3 years ago.

6.6 As well as the number of people interested in starting construction apprenticeships, employers were asked about the type of people interested. A third of employers in Northern Ireland (32%, exactly matching the UK-wide figure) felt that the type of people wanting to do an apprenticeship had changed over the last 2-3 years. The most common changes cited by these employers were an increase in applicants from academic backgrounds (45%) and from older applicants aged 19 or over (37%).

6.7 Employers that employed or had recently taken on any apprentices were asked how they rated their recruits' skills and attributes against what they would expect of people at that current level. Overall the responses were positive, with just over three-quarters rating their apprentices' skills and attributes as good (72%) or very good (5%). That said this is somewhat lower than found UK-wide (25% very good, and 84% very good or good).

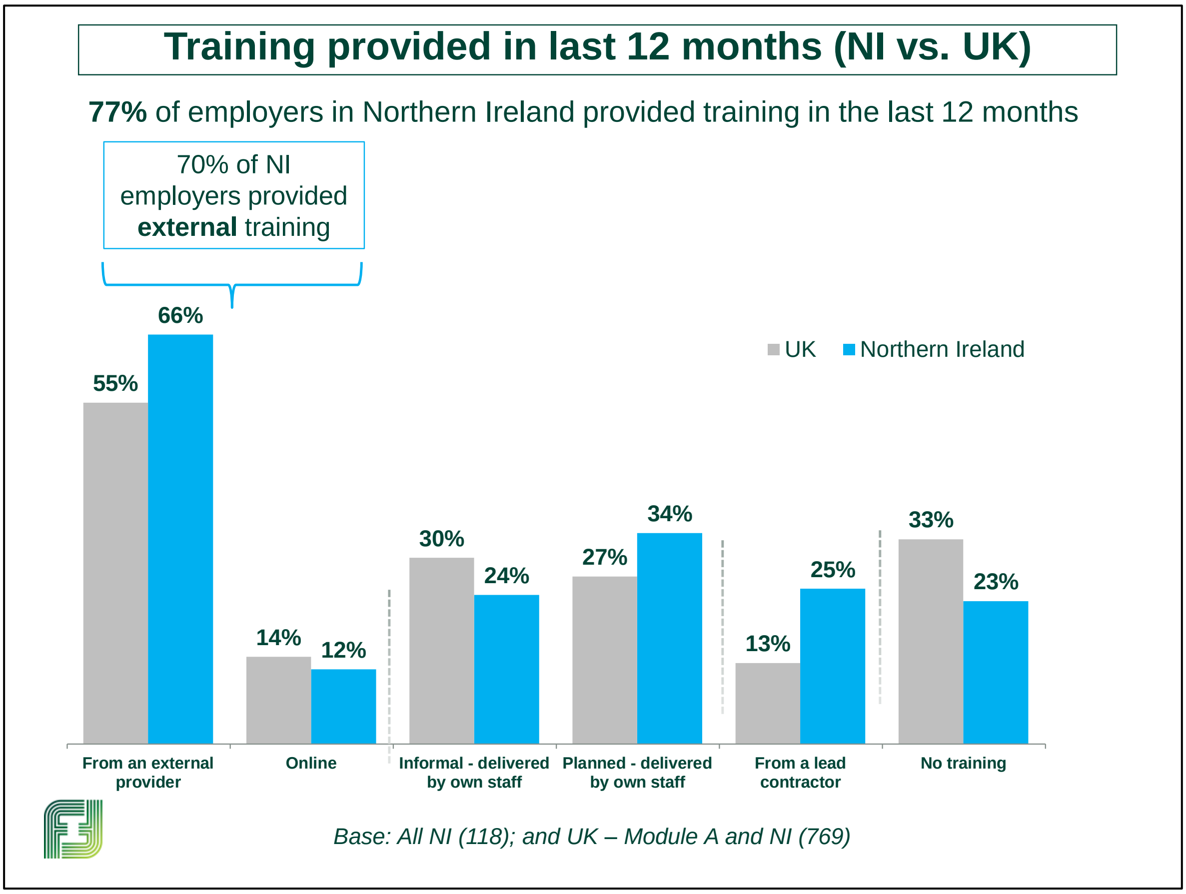
6.8 A fifth of employers (20%) in Northern Ireland were at least quite likely to take on any apprentices in the next 12 months, a slight increase from the previous wave (14% in wave 2012, with a significant fall in the proportion 'not at all likely' from 52% in 2012 to 38%). That said, confidence remains fragile: only 3% said recruitment of apprentices was *definite* (the same figure as found across the UK as a whole).

6.9 By far the most common explanation for being unlikely to take on apprentices was business uncertainty (77%).

7 Training and Qualifications

7.1 This chapter examines a range of issues relating to training and staff development. These questions were asked of all respondents in Northern Ireland but half those in Great Britain (this section was modularised).

7.2 Over three-quarters of employers in Northern Ireland (77%) provided some form of training to their employees in the last 12 months, a higher proportion than the UK as a whole (67%). Two-thirds arranged any training provided by an external provider (again higher than the UK proportion of 55%). It was noticeable that more employers in Northern Ireland reported receiving any training via a lead contractor than was found UK wide (25% vs. 13%).

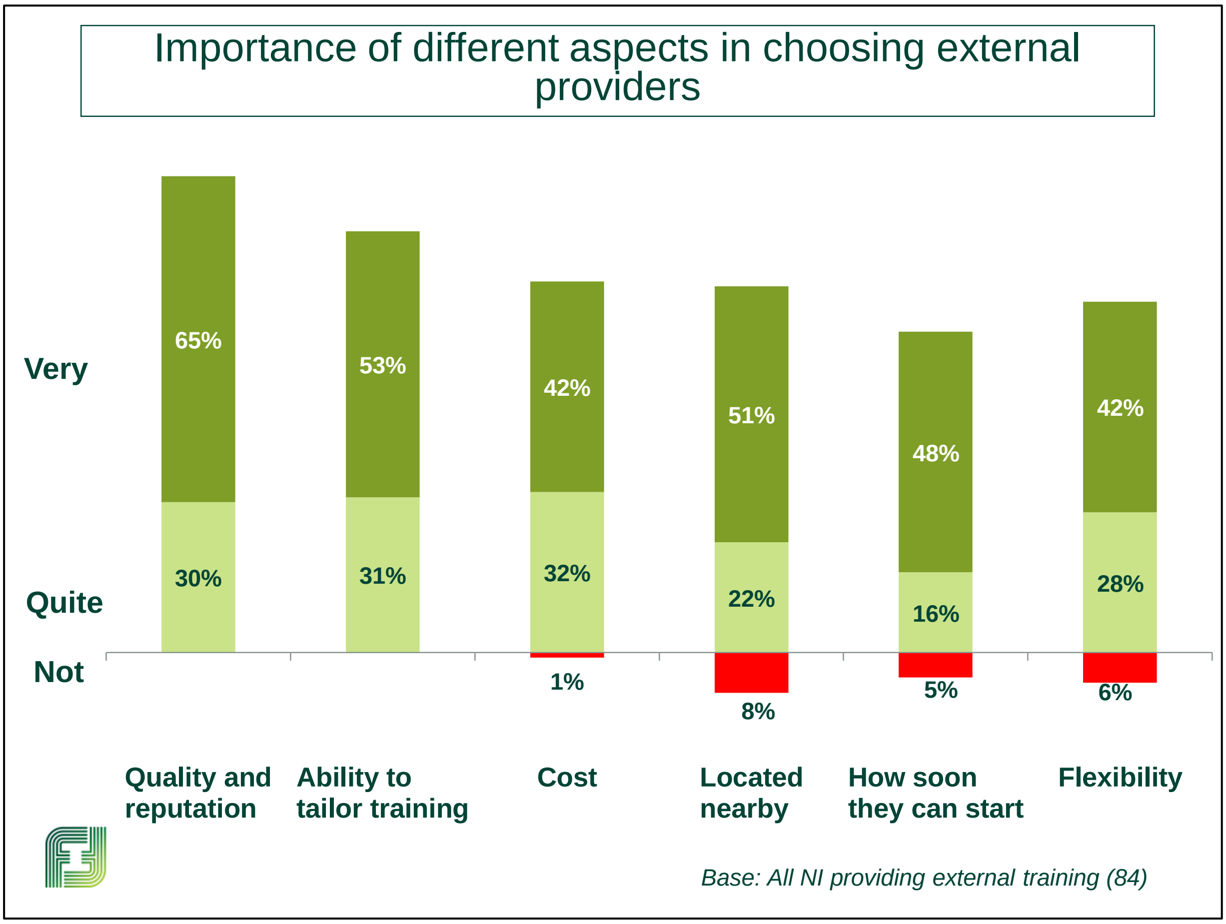


External providers

7.3 Those who provided training via an external provider (including online training) in the last 12 months were asked which types of provider they had recently used. By far and away the most common type of external provider used was private training providers (by 58% of all employers). In comparison 21% of all employers had used an FE college, 14% CITB-ConstructionSkills NI, and 12% an Employer Federation in partnership with CITB-ConstructionSkills NI.

7.4 The aspect considered most important when choosing external training providers was the quality and reputation of the provider, with 95% of employers providing external training considering this either very or quite important. The ability to tailor training also ranked highly in terms of importance (84% very/quite important).

7.5 Cost and being located nearby were the next two most important aspects: cost was a more important factor in Northern Ireland than found UK-wide (75% very/quite important compared with 68% in the UK overall). Employers in Northern Ireland rated the flexibility in how providers deliver the training as the least important of the aspects covered (69% very/quite important, much lower than the 87% found UK-wide). The six aspects are ranked left to right in descending mean score order of importance. Results are clearly useful for CITB-ConstructionSkills NI in the marketing of its training provision.

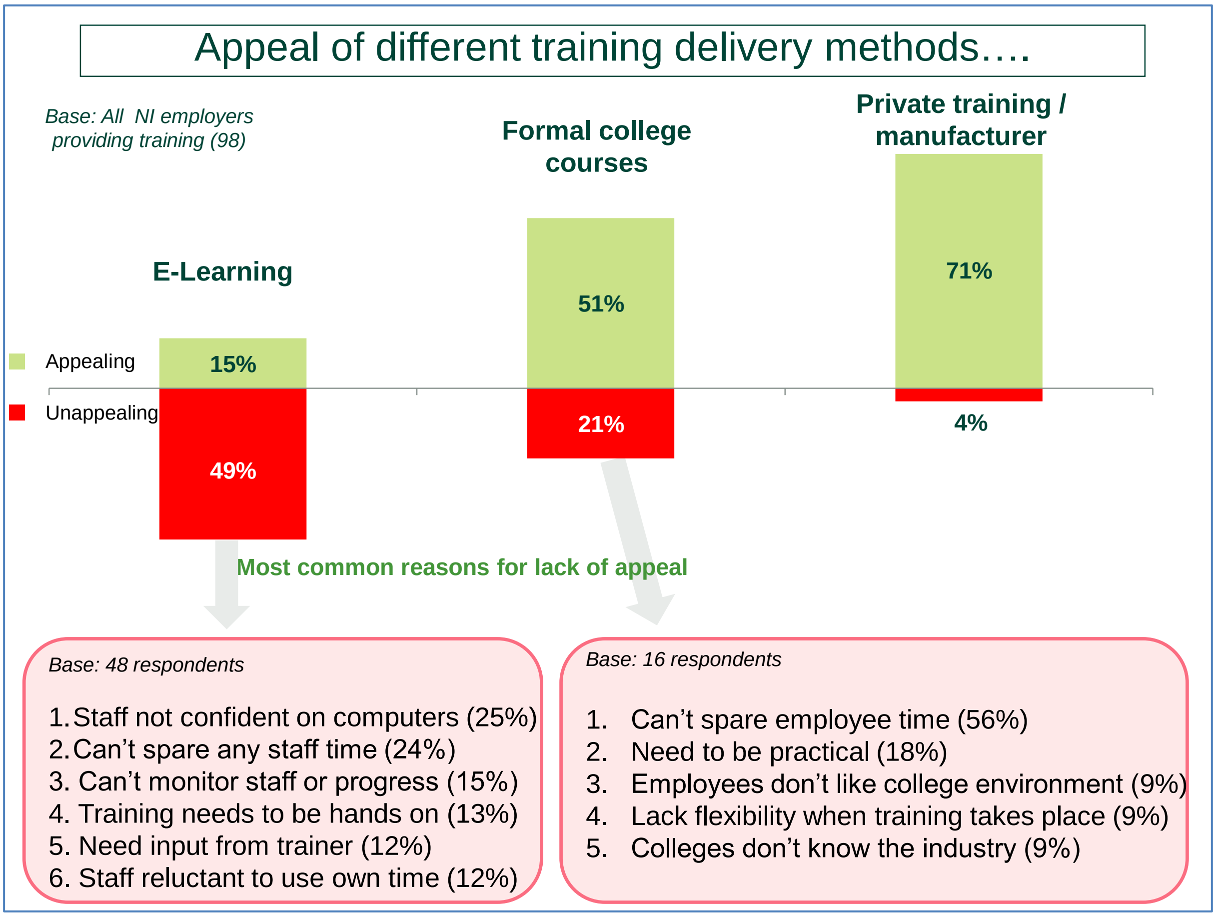


The appeal of different delivery methods for training

7.6 We have seen that relatively few employers had provided training delivered through online methods in the last 12 months (12%). A number of questions were asked about the appeal of different methods of training and, where unappealing, the reasons for this. Results are summarised on the following chart.

7.7 By far the least attractive to employers was e-learning / e-training: just 15% of trainers described this as appealing compared against almost half (49%) describing this method as unappealing. A variety of reasons were given including their staff are not being confident on computers (25%), not being able to spare staff time to train in this way (24%), not being able to monitor progress (15%) and training needing to be hands on.

7.8 More traditional methods of training are much more appealing to employers, particularly training delivered by private providers or manufacturers (71%). Half find training delivered via formal college courses appealing (51%). Where not appealing this was usually because employers could not spare the time for their employees to attend college courses.



Training to formal qualifications

7.9 Around half of employers in Northern Ireland that provided training in the last 12 months said at least some of this training was intended to lead to formal qualifications (46%). This is lower than found among employers in Great Britain (56%). Nevertheless still seven in ten training employers in Northern Ireland considered it either vital (29%) or very important (40%) for their staff to obtain a qualification, accreditation or industry-recognised certificate from their training. Only 2% felt that qualifications and accreditation were not important outcomes of training.

7.10 When employers that trained were asked specifically whether they ever find that unaccredited certificates or similar from training providers are as useful or more useful than the 'official' qualifications for the same sort of skill, there were mixed views: a third (34%) agreed that these unaccredited certificates could be as useful, slightly more (45%) thought the opposite, and quite a large proportion (20%) felt unable to give a view one way or the other (presumably on the basis that they had no experience of these unaccredited certificates).

Verification of qualifications when recruiting

7.11 Respondents were asked to what extent qualifications were of interest when recruiting staff. In line with the UK as a whole, around four in five employers considered qualifications to be either very (38%) or quite important (40%), and just 3% said they were not at all important. Employers thinking qualifications of at least some importance when recruiting tend to ask the individual for documentation (44%), contact referees (22%), check the CV of the individual (14%), contact the awarding body (7%) and contacting the training provider (5%).

7.12 Among those who did verify qualifications, around one in five (18%) considered this to take a lot of effort (compared with 42% who felt it was relatively little effort and 38% who felt it was hardly any or no effort at all).

7.13 Employers were also asked how they check the skills of their workers besides looking at qualifications. Around half of all employers said they carried out observations and monitored recruits on the job (47%), and a similar proportion checked references (40%, twice the level found UK-wide). One in nine respondents (11%) said they would make no further checks (beyond qualifications, if they check these).

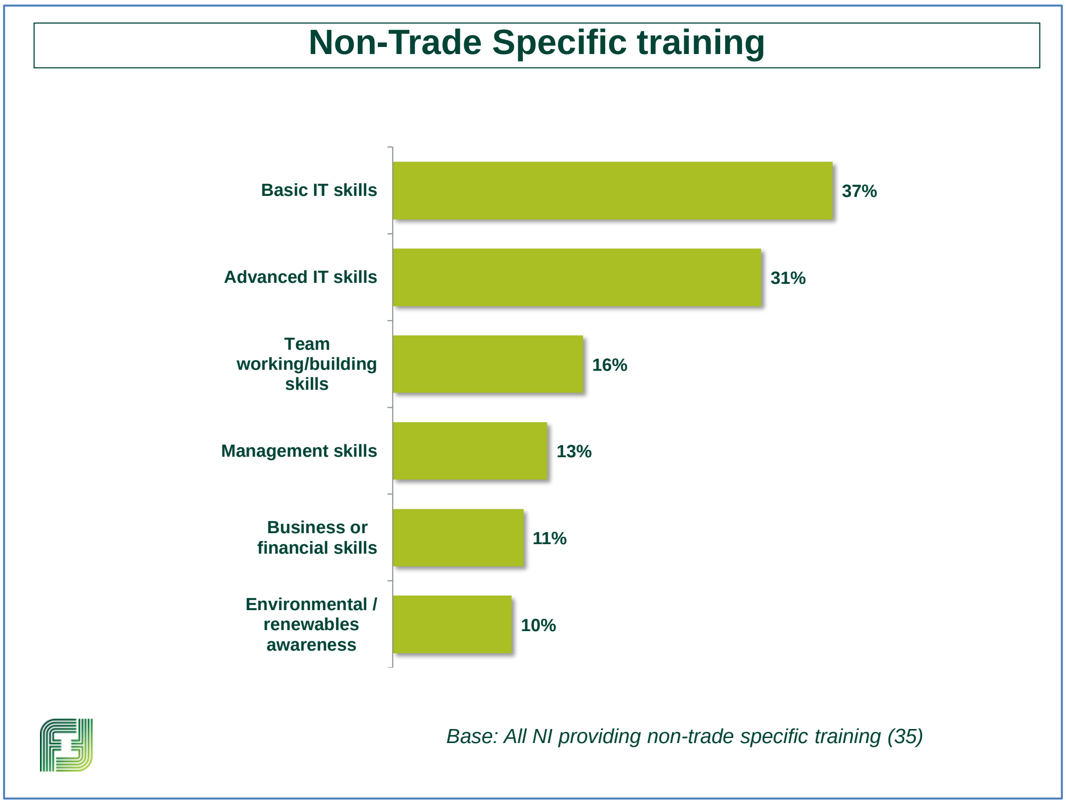
Non-Trade specific training

7.14 Employers were asked whether they had delivered different types of training. Nearly all trainers in Northern Ireland had provided training to develop health, safety and/or environmental skills (95%), four-fifths had provide technical, trade specific training (80%), and a fifth of trainers had provided training for their staff aimed at improving non-trade specific skills such as sales, customer handling, management or IT (20%, lower than the UK-wide figure of 32%).

7.15 By far the most common reasons why non-trade specific training was not provided by firms was that they considered these other areas such as health and safety and technical training as more of a priority (88%) or their staff had no skill needs in areas such as sales, customer handling, IT etc. (81%). Far fewer (also) cited the cost of non-technical training (22%), not being sure who provided his training (21%) or because they have no good local suppliers of this training (12%).

7.16 Respondents who provided non-trade specific training were asked a series of questions in regard to the non-specific training they provide. These results should be treated as indicative as they are based on a relatively low number of respondents in Northern Ireland providing this type of training (35).

7.17 The main types of non-trade specific training provided were aimed to develop either basic or advanced IT skills (37% and 31% respectively). Despite sales or customer services being mentioned as the most common type of non-trade specific training in the UK overall (29%), only 2% of employers Northern Ireland mentioned this as an area which the training sought to develop. The other main areas of training are shown in the table below.



7.18 Respondents were asked how this non-trade specific training had been delivered. Most commonly, employers used an external provider (56%). Employers also mentioned e-learning (16%) and in-house methods (13%) as ways in which this training had been delivered.

7.19 All employers in Northern Ireland were also asked how likely they were to undertake training to develop non-trade specific skills over the next 2-3 years. A quarter of respondents (24%) said they were likely to undertake this type of training. As expected, those who had already funded or arranged non-trade specific training were more likely to undertake this type of training again in the next 2-3 years (89%) than those who had not recently provided this type of training (15%). The most likely specific areas for such training were in management-related skills (53%), followed by basic IT skills (29%), supervisory skills (16%), general skills in construction (15%) and sales and customer service skills (13%).

7.20 Four in five employers (80%) who were hoping to undertake non-trade specific training in the next 2-3 years felt it would be easy to find suitable suppliers to provide this training, leaving one in five of these employers (20%, equivalent to 5% of all employers) who felt it would be difficult (higher than the 11% found UK-wide).

8 Non-UK Workers

8.1 In this chapter we report at issues relating to the employment and training of non-UK workers, and look specifically on the anticipated effect of changes in migration for Bulgarian and Romanian citizens. Note these findings should be viewed as indicative of the general population due to the small base for those employing non-UK workers.

8.2 Only 3% of employers in Northern Ireland had employed any staff in the last 12 months who were not UK passport holders. This compares to 6% UK-wide, although this figure is heavily influenced by results in London (18%) and the South East (11%), and in Wales, Scotland and most other English regions the figures was 2%-3%. The proportion of construction firms in Northern Ireland employing any non-UK workers in the last 12 months was slightly lower than found the year previously (6%).

8.3 Among those employing non-UK workers, these staff represent a small proportion of the workforce: over three-quarters (78%) indicated that they comprised less than 5% of their total workforce, and on average they made up just over 5% of the workforce. In comparison a quarter of employers in Great Britain with non-UK workers indicated they comprised less than 5% of their workforce, and on average they made up a fifth of their workforce.

8.4 Around half of employers in Northern Ireland that had employed non-UK staff in the last 12 months (52%) had employed staff that were citizens of other EU countries, but none had taken on any of Romanian or Bulgarian nationality.

8.5 Employers in Northern Ireland appear more likely to verify the non-UK qualifications of their workers than the rest of the UK. Three-quarters (75%) indicated that they either always or usually verified non-UK qualifications (much higher than found across the rest of the UK (48%)) while 12% of employers in Northern Ireland employing non-UK staff said they never verified these qualifications. Furthermore, Northern Ireland employers who sometimes check non-UK qualifications appear more likely to understand what these qualifications actually mean in terms of what the staff have been taught and what it is equivalent to in the UK (64% vs. a UK average of 52%, though this is based on just eight respondents in Northern Ireland).

8.6 All respondents were also asked what impact they felt the removal of work restrictions for Romanian and Bulgarian citizens in 2014 would have on their business. By far the most common response was that it would have no impact at all (84%). More of the remaining respondents felt that the impact would be negative than positive (5% vs. 2% respectively), though 5% were unsure what impact it would have. In comparison construction employers in Great Britain were far more likely to anticipate negative consequences (27%; just 2% thought the changes would have a positive impact).