



CITB NI

Employer Research Report

December 2015





- ❖ CITB provided data files to Turquoise Thinking Ltd for the analysis of the 2015 NI Employer and Stakeholder Research.
- ❖ The findings and insight will be used to provide support to CITB NI's mission to develop and embed a training culture which will improve the skills and productivity of the Northern Ireland construction industry.
- ❖ The main focus within this report is to build upon previous findings and explain the patterns that are present within the data.
- ❖ Where appropriate, findings from the research conducted in 2012, 2013 and 2014 have been included.
- ❖ To ensure comparability, the methodology for the 2015 survey was designed to replicate that used for the 2006 to 2014 Employer Tracking Surveys. However, the final 2015 sample was predominantly made up of micro and small businesses – a difference to that seen in previous surveys (please see sample structure later in the report).
 - ❖ Please note that where reference is made to size of business, these are defined as:
 - ❖ Micro = up to 10 employees
 - ❖ Small = 11-50 employees
 - ❖ Medium = 51-250
 - ❖ Large = 250 employees plus
- ❖ A total of 100 telephone interviews were conducted with construction sector employers in Northern Ireland.
- ❖ This report details the findings of Northern Ireland employers. Employer and stakeholder views from across Scotland, England and Wales are reported upon separately.
- ❖ No weighting has been applied to the survey data.
- ❖ Note that for a survey sample of 100 interviews, the standard error is approximately +/- 9.6% at the 95% confidence level; hence some caution is needed when interpreting the results.
- ❖ Throughout the report comparisons are made with past Northern Ireland Employer Tracking studies including 2013 (104 interviews) and 2014 (100 interviews).



- ❖ The key business objective of the research was to:-

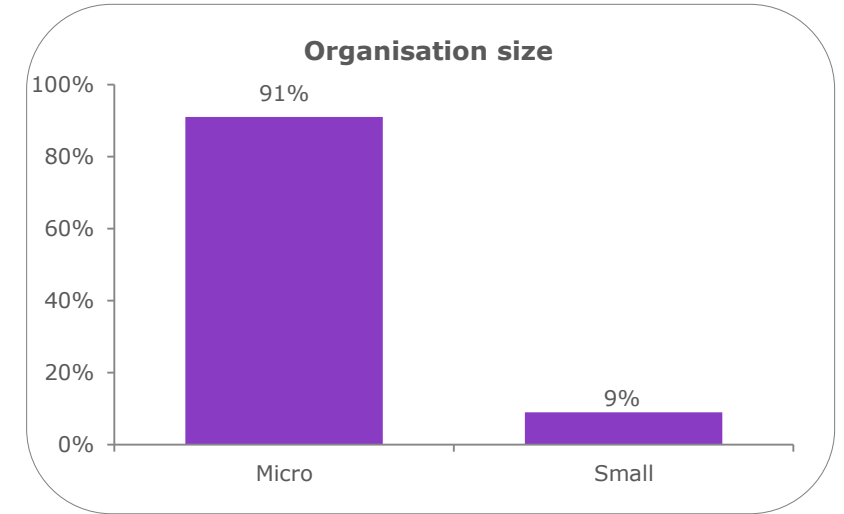
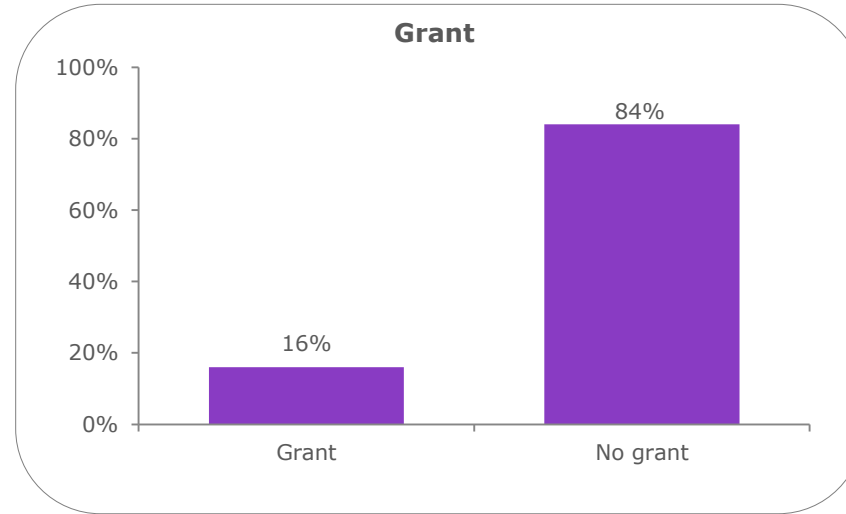
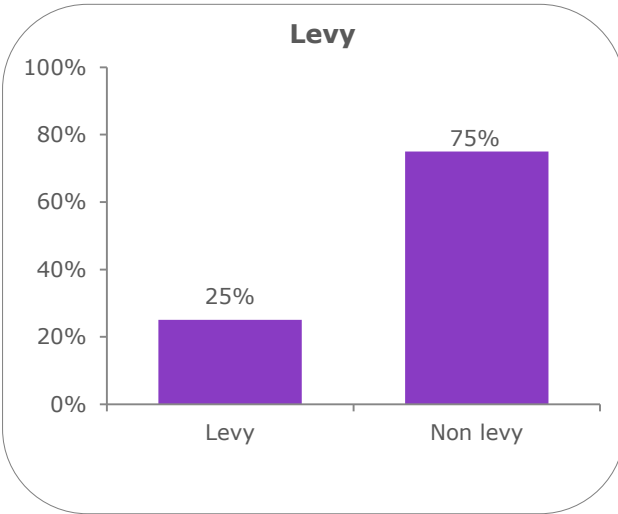
"Measure employer awareness, understanding and satisfaction with the range of products and services offered by CITB NI"

- ❖ CITB NI provides various services to the construction industry in Northern Ireland and needs to be able to demonstrate that it has the approval and support of the industry.
- ❖ To this end, CITB NI provided data files to Turquoise Thinking Ltd for the analysis of the 2015 NI Research.
- ❖ The specific objectives of the research were to:
 - ❖ Measure employer awareness, understanding and satisfaction with the range of products and services offered by CITB NI
 - ❖ Assess views of communication received from CITB NI
 - ❖ Assess the level of support for the continuation of the Levy-Grant system
 - ❖ Gauge perceptions of the value that CITB NI adds to the industry's training culture
 - ❖ Understand more about training behaviour and attitudes towards training.

NI Employer Sample



There has been a change to the sample make up this year with the vast majority of employers being from micro businesses



- ❖ The main job titles of employers spoken to were: Director (69%), Manager (7%), Company Secretary (4%) and Office Manager (4%).
- ❖ The sample make up is different to the previous two years of data and therefore, caution should be exercised when making direct comparison to previous years. Previously there was a 60, 30, 10 split between micro, small and large businesses. There is no representation from large businesses in this year's data set.
- ❖ Just 16% of employers have received a grant and a quarter pay the levy (25%).

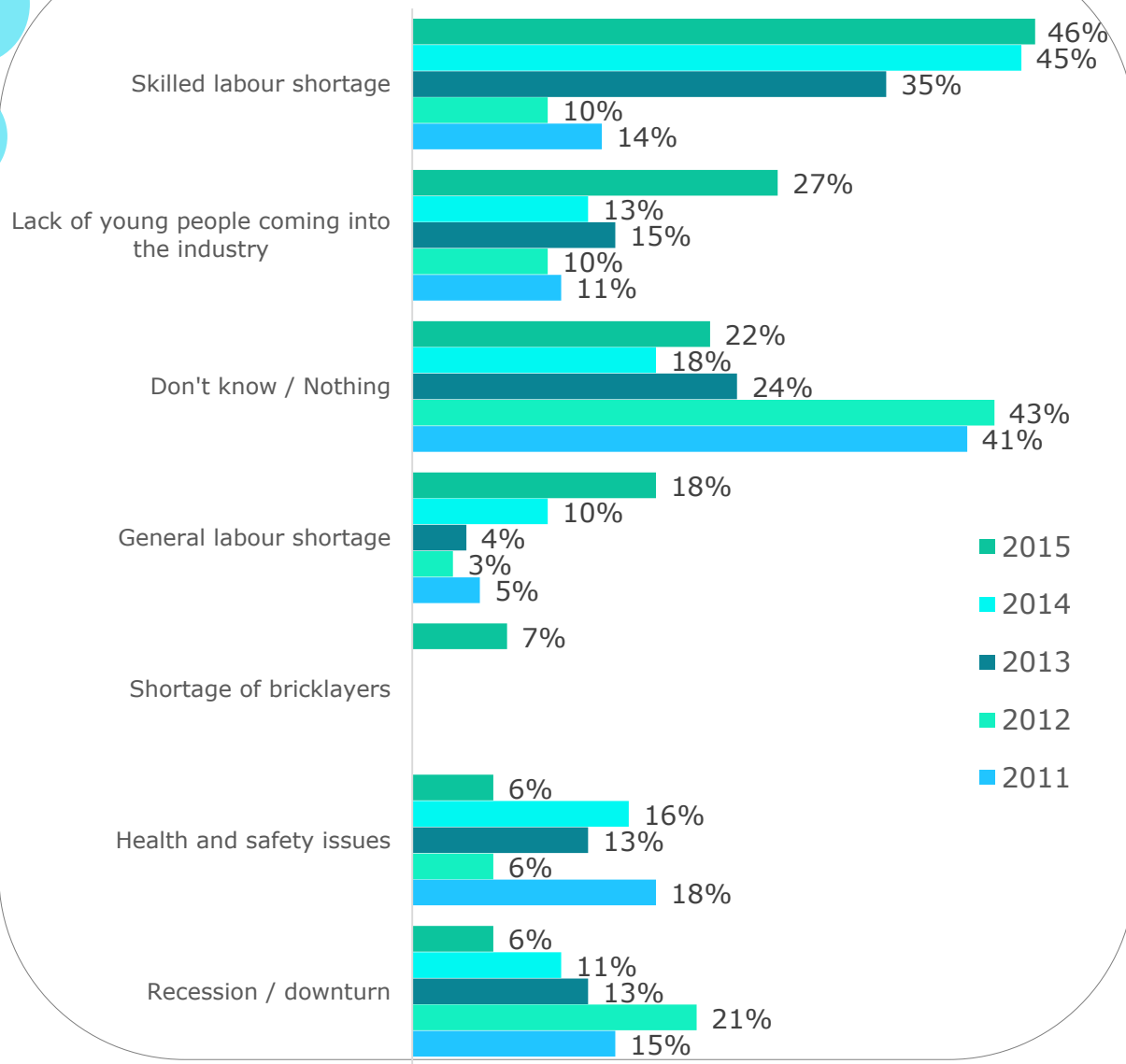
Skills and training issues





The main concern for the industry remains a skilled labour shortage

Skills issues the industry will face in the next year



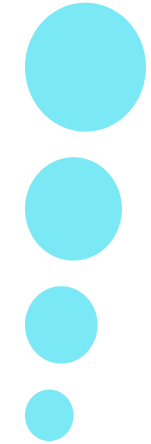
- ❖ Employers were asked to spontaneously comment on what they considered to be the most important skills issues facing the industry in the next year or so.
- ❖ The findings provide some context within which to understand the market for CITB NI's products and services now and in the near future.
- ❖ Employers were most likely to feel that the most important skills issue facing the construction industry in the coming year is a shortage of skilled labour (46%). This is in line with the 2014 finding of 45% believing this to be so.
- ❖ This has cemented the belief that there is a skills shortage in the sector given the result has held for two consecutive years. In 2013 a lower proportion of the sample cited skills shortages as an issue (35%), but prior to this the proportions are noticeably lower (10% in 2012).
- ❖ Also linking with a skills shortage, 27% of the sample felt there will be a lack of young people coming into the industry and a further 18% felt there would be a general labour shortage. So despite an agreement on skilled labour issues, 2015 has seen an increase on 2014 in the proportion of employers citing other variables linked to labour shortages as an issue.



One in five employers are currently experiencing recruitment issues



- ❖ Just over a fifth (22%) of employers did not know of, or did not feel that there were any skills issues facing the industry in the next year. This is in line with the proportion reported in 2014 (18%). It is notably less than in 2012 (43%) and 2011 (41%), indicating that these issues are becoming more prominent.
- ❖ Commonly cited in 2014 and 2013 were health & safety issues (16% and 13% respectively) and training-related issues (14% and 22% respectively). However, in 2015 the proportion citing these issues fell sharply (6% and 5% respectively) indicating that these areas are of less concern than they were 12 months ago.
- ❖ A fifth of employers were experiencing recruitment issues at the time of the survey (20%). This is similar to 2014, when 18% of employers stated that they were experiencing recruitment difficulties and a rise on 2013 (10%). This fits with the finding of increased concern regarding skills shortages since 2013.



Awareness, use and satisfaction with services





Unprompted Awareness of Services

Training (specialist and general)

66%

Grants

23%

Advice / Business Support

6%

Seminars

5%

Help with apprentices

5%

- ❖ Employers were asked which services provided by CITB NI, they were spontaneously aware of.
- ❖ The five most common services mentioned by employers in 2015 are shown opposite.
- ❖ Most commonly employers associate CITB NI with training courses, with over two thirds of the sample citing this (66%). This is an increase on the proportion witnessed in the previous two years (58% 2014 and 57% 2013 respectively).
- ❖ Interestingly, unprompted awareness of CITB NI's training courses has risen year on year since 2011, whereas, for other products and services, this has not been the case.
- ❖ Other than that increase, responses remained relatively consistent where comparison was possible. 8% of the sample cited that CITB NI didn't provide anything applicable or useful to their company.



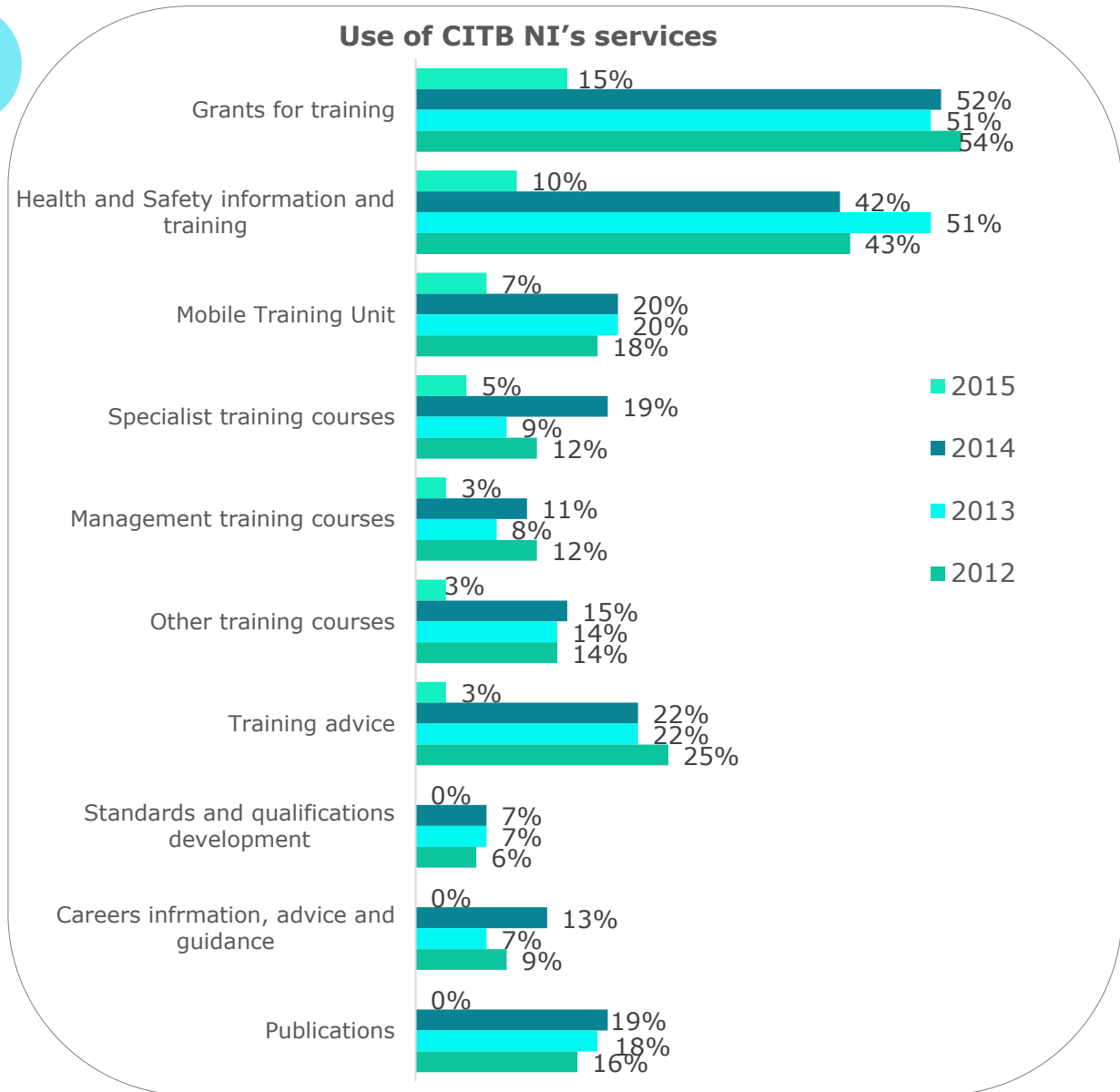
CITB NI is primarily associated with services related to training

Prompted awareness of services	2015	2014	2013	2012	2011
Base: all employers (c. 100 each year)	%	%	%	%	%
Grants for training	92	98	93	96	98
Health & Safety information and training	90	97	91	92	94
Other training courses	80	80	56	69	57
Specialist training courses	76	94	61	72	64
Mobile training unit	73	90	86	88	87
Management training courses	72	74	79	80	81
Training advice	71	62	87	85	90
Skills competitions (e.g. SkillBuild)	65	71	56	63	n/a
Employer engagement events	65	77	n/a	n/a	n/a
Training in partnership with industry bodies and federations	60	85	69	n/a	n/a
Standards and qualifications development	59	61	55	61	64
Provision of publications	52	77	70	71	80
Careers information and advice	42	59	52	60	51
Conducting research and providing Labour Market Information (LMI)	40	50	39	43	39
Projects funded by external sources	34	50	36	n/a	n/a

- ❖ Employers were also read a list of CITB NI’s current services. Once prompted, nearly all employers were aware that CITB NI provides grants for training (92%) and health and safety information and training (90%).
- ❖ There has been a reduction in awareness across a range of services. With the most notable being awareness of:
 - ❖ The mobile training unit (fallen from 90% in 2014 to 78% in 2015)
 - ❖ Provision of publications (fallen from 77% in 2014 to 52% in 2015)
- ❖ Average awareness across the services is 69%. Those that have the least awareness are:
 - ❖ Careers information and advice (42%)
 - ❖ Conducting research and providing LMI (40%)
 - ❖ Projects funded by external sources (34%)
- ❖ Interestingly, in the previous piece of tracking research, there was only one service which less than half of the sample were aware of, working with schools.
- ❖ The clear finding from this result is that CITB NI is primarily associated with services relating to training, such as providing grants for training, health and safety information and training and specialist training courses.



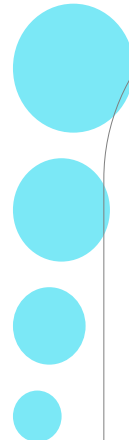
There was low reported usage of CITB NI's services this year, likely due to differences in the sample make up year on year



- ❖ Employers were asked which of CITB NI's services they had used in the last 12 months.
- ❖ This year there has been a significant reduction across many of the services. The likelihood is that this is linked to the high proportion of micro businesses within the sample compared to previous years. 91% of the sample is made up of micro businesses, compared to 60% previously.
- ❖ The most commonly used service was still grants for training (15%), followed by health and safety information and training (10%).
- ❖ The mobile training unit was also comparatively popular (7%).



Satisfaction with four of the ten services used by employers in the 2015 survey is at 100%



Satisfaction with CITB NI's services

Mean scores

		Mean scores		
		2015	2014	2013
Management training courses (2)	100%	5.0	4.1	5.0
Other training courses (3)	100%	5.0	4.4	4.1
Delivery of projects with funding from external sources (2)	100%	5.0	-	-
Mobile Training Unit (5)	100%	5.0	4.6	4.6
Health and Safety information and training (9)	89%	4.2	4.2	4.4
Grants for training (14)	79%	4.1	4.3	4.2
Specialist training courses (4)	75%	4.0	4.3	4.6
Training advice (2)	50%	3.5	4.2	4.0
Training delivered in partnership supported by CITB NI funding (4)	50%	3.8	-	-
Employer engagement events covering CITB NI products and services (2)	50%	3.0	-	-
Careers information, advice and guidance (0)		-	4.4	3.8
Publications (0)		-	4.3	4.4
Skills competitions (0)		-	5.0	-
Standards and qualifications development (0)		-	4.4	4.1

- ❖ Service users were asked how satisfied they were with each service on a scale of 1 (very dissatisfied) to 5 (very satisfied). In the graph scores of 4 and 5 have been combined to give overall satisfaction levels.
- ❖ Mean scores are shown along side the chart, including means for 2014 and 2013.
- ❖ Note the low base sizes shown in brackets which will cause large fluctuations.
- ❖ Satisfaction is generally high across the services used.
- ❖ One finding of potential concern is that only 50% of employers that used CITB NI's training advice found it satisfactory. However, there were only 2 employers in this category, one of which was ambivalent.



All types of training courses score highly for importance

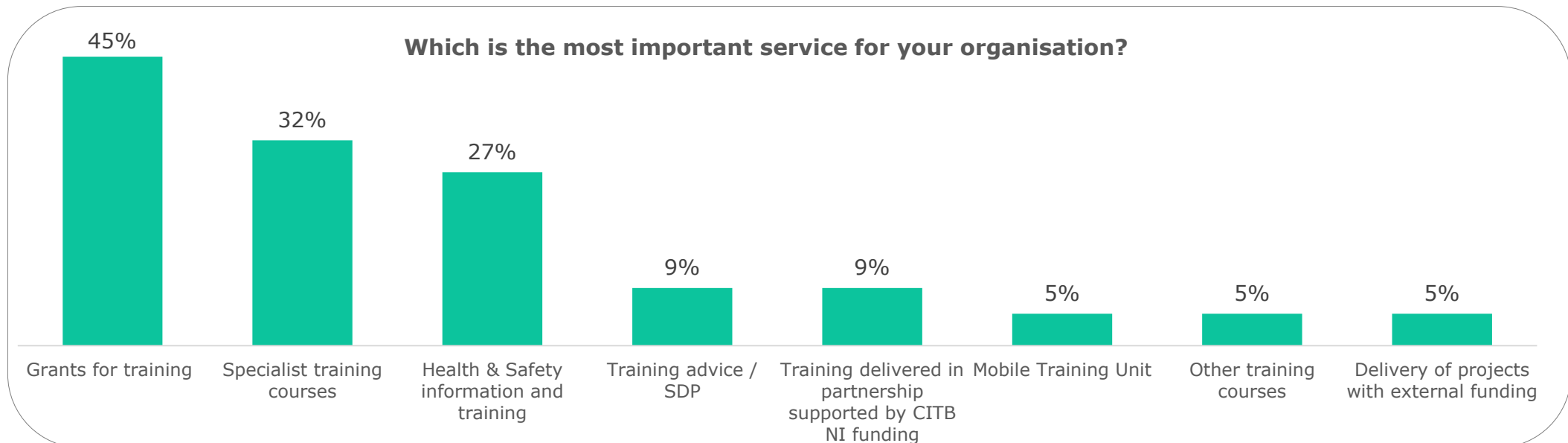
Perceived importance of CITB NI's products and services

Base: all employers using each service	Base	2015	2014	2013
	(2015, 2014, 2013)			
Other training courses	(3,15,15)	4.7	4.2	3.7
Specialist training courses	(4,18,9)	4.5	4.7	4.4
Training advice / SDP	(2,22,23)	4.5	4.5	3.7
Health & Safety information and training	(9,42,53)	4.3	4.7	4.3
Mobile Training Unit	(5,20,21)	4.2	4.7	4.1
Grants for training	(14,52,53)	4.1	4.6	4.5
Management training courses	(2,11,8)	4	4.2	4.4
Training delivered in partnership supported by CITB NI funding	-4	4	-	-
Delivery of projects with external funding	-2	3	-	-
Employer engagement events covering CITB NI products /services	-2	3	-	-
Standards and qualifications development	(0,7,7)	-	4.1	4.4
Provision of publications	(0,19,19)	-	4.1	3.7
Careers information, advice and guidance	(0,13,15)	-	4.5	3.3
Conducting research and providing LMI	(0,50,41)	-	3.9	3.1
Working with schools to promote construction as a career	(0,44,43)	-	3.9	2.9

The importance of training courses is clear and having grants to carry out the training is the most important aspect for employers



- ❖ Again it is clear that the change in sample make up is affecting the proportions of employers that have been able to respond to questions regarding service usage. However, largely the picture is quite similar across the past three years of data.
- ❖ The main noticeable difference is an average of 2 (fairly unimportant) for skills competitions, last year a score of 5 (very important) was noted. However, there was only a sample of one for each year so the finding is highly subjective.
- ❖ All the training courses are seen as important, with those falling under the category of 'specialist' being most important. This is probably linked to the sample as many small and micro businesses are specialists.
- ❖ Employers felt that the most important service to their organisation was grants to employers for training; 45% of those asked felt this to be most important. Grants were also found to be the most important service in 2014 and 2013.
- ❖ A third cited specialist training courses (32%) and just over a quarter felt health and safety information and training was most important (27%).



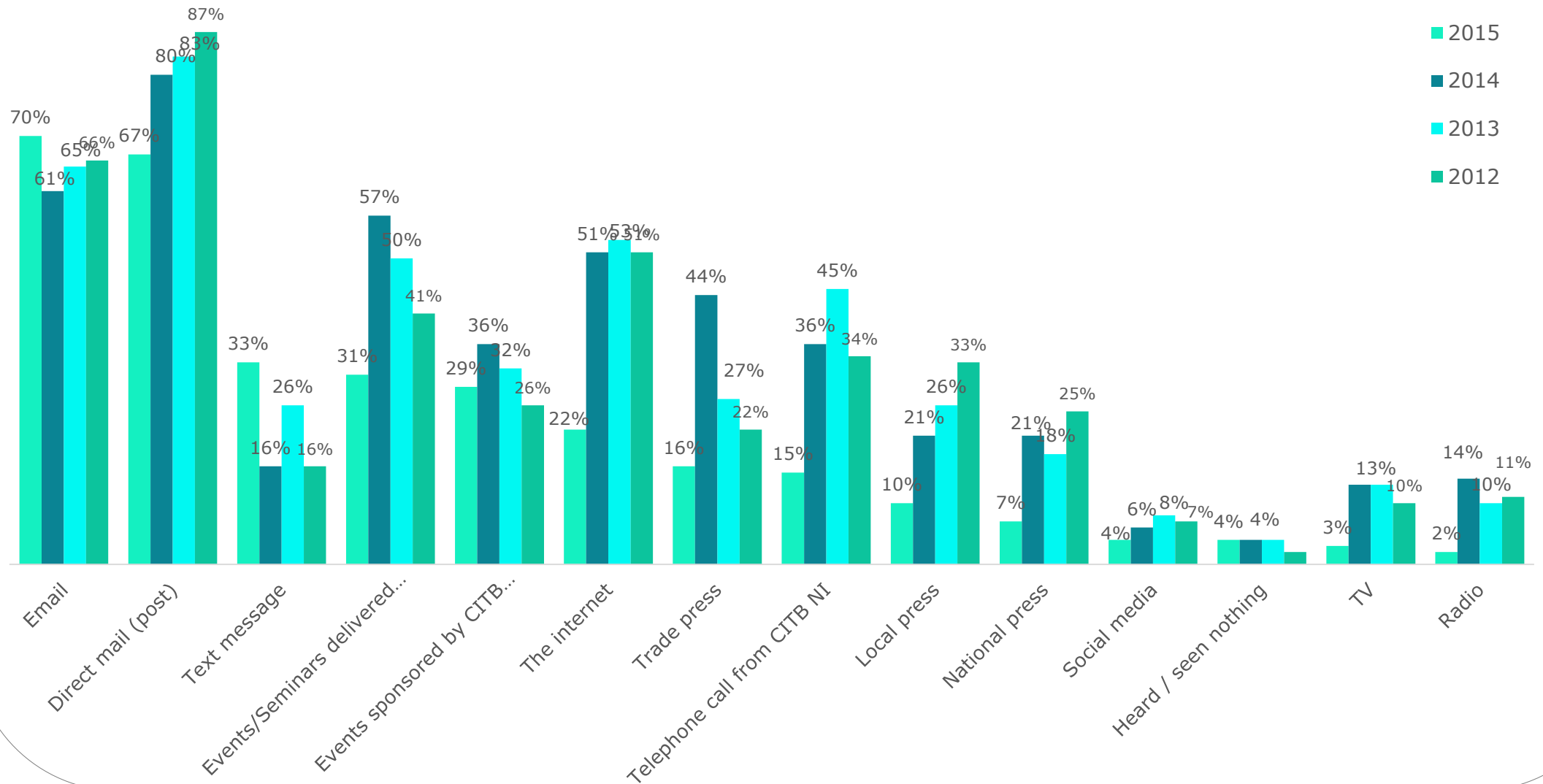
Communications



Employers are most likely to have heard about CITB NI via email or post



Have you heard about CITB NI through any of the following in the last 12 months

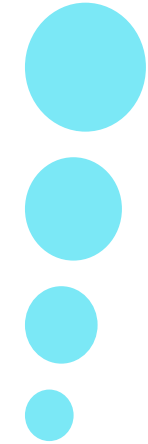




There is very low unprompted awareness of CITB NI's social media pages



- ❖ Employers most commonly hear about CITB NI through email (70%) or direct post (67%).
- ❖ Interestingly, there has been a reduction in the proportion citing direct post this year and a slight increase in those citing email. This could be reflective of a new approach taken by CITB NI over the past 12 months?
- ❖ Twice as many employers have heard about CITB NI through text messages than 12 months ago (33% compared to 16%).
- ❖ Additionally, just 22% cited the internet, whereas 12 months ago this proportion was 51%. The reason for this again appears to be a change in sample make up, since among small businesses, which make up 9% of the sample, 44% cited the internet compared to 20% of micro businesses. Therefore, small businesses are more likely than micro businesses to use the internet to research or look at organisations such as CITB NI. The picture is the same looking across to the trade press and telephone calls from CITB NI.
- ❖ Given there were similar proportions of employers citing email and post, it would be an insightful exercise for CITB NI to compare the quantity of communication they fed out through either medium over the past 12 months to get an idea of how effective each is.
- ❖ There is very low unprompted awareness of CITB NI's social media sites, however when specifically asked, 24% of the sample were aware of CITB NI's social media sites. This is an area to develop should CITB NI feel there is a benefit in doing so.

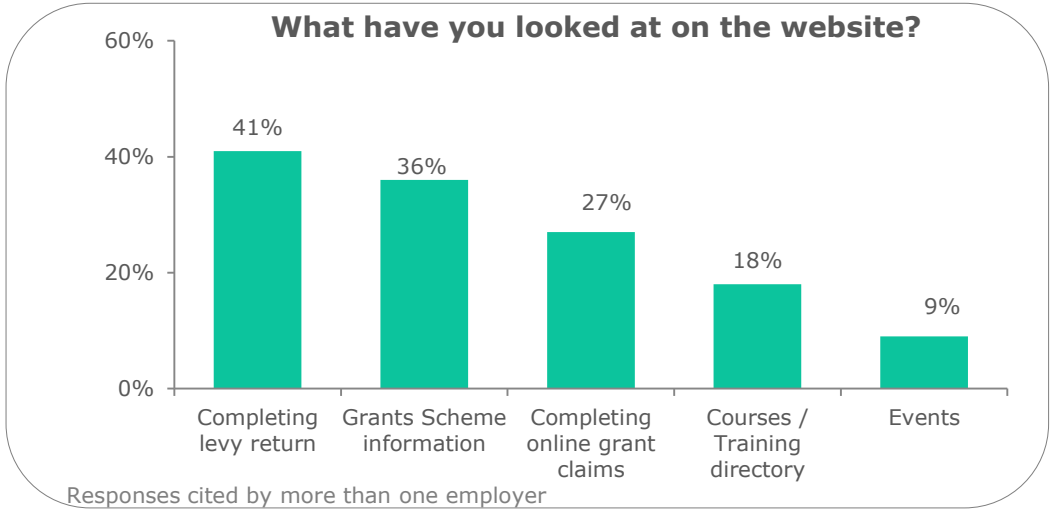
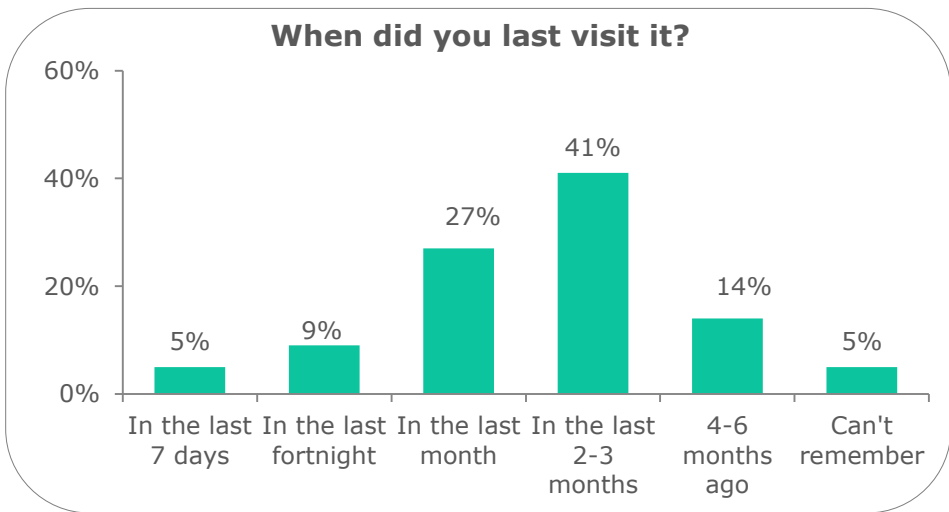




Completing the Levy Return and Grant Scheme information are the most common reasons for looking at the website

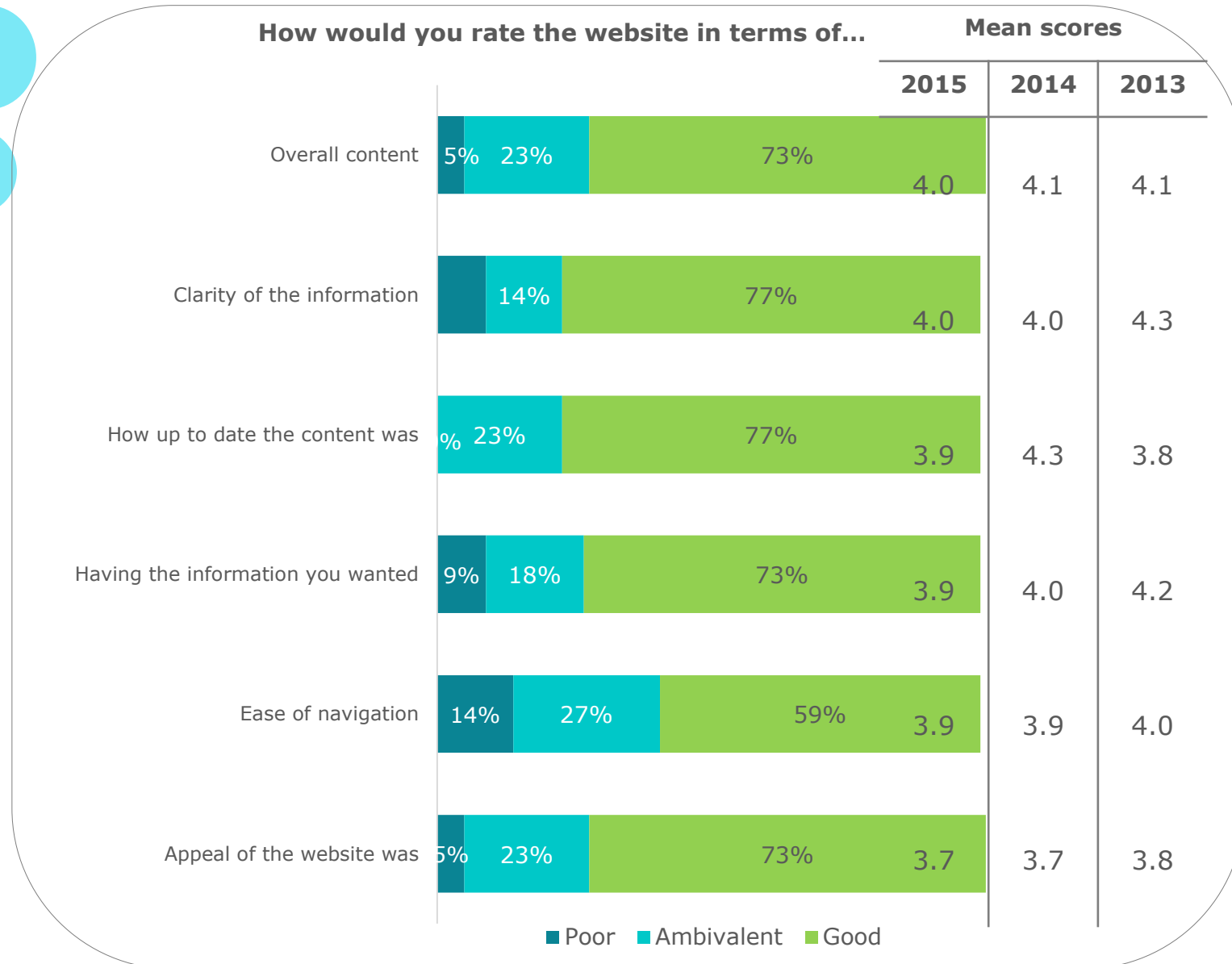


- ❖ 22% of employers within the sample had visited CITB NI's website in the past 6 months, this is a sharp reduction on the 2014 figure (57%). Broken down by business size, 44% of small businesses and 20% of micro businesses had visited the website. Therefore, again, sample make up is altering the overall response rather than a change in employer attitudes.
- ❖ The proportion that have visited the CITB NI website in the past 6 months rises further among those that have received a grant to 63% (compared to 14% of those that have not received a grant).
- ❖ Most commonly cited was that employers had visited the website 2 to 3 months prior to the survey (41%), which would tie in with levy returns being done online.
- ❖ For those that have been on the website, the most common area to look at is the section on completing the levy return (41%), followed by grants scheme information (36%) and completing online grant claims (27%).
- ❖ Looking at previous results, Grant Scheme information was the most common reason for visiting the website last year (53%) followed by completing the levy return (26%).
- ❖ Note that all those citing they had looked on the website to complete the levy return were micro businesses.





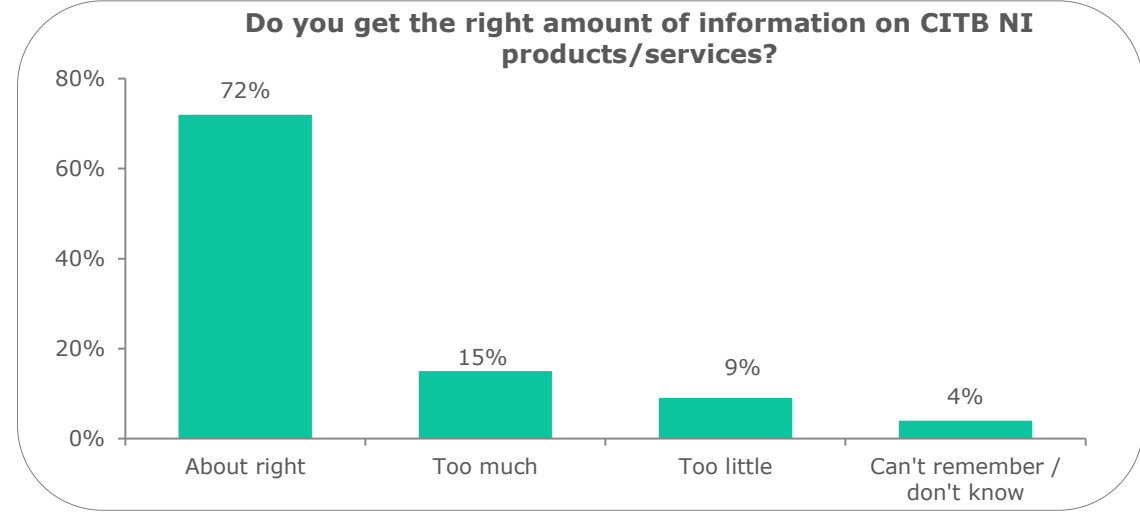
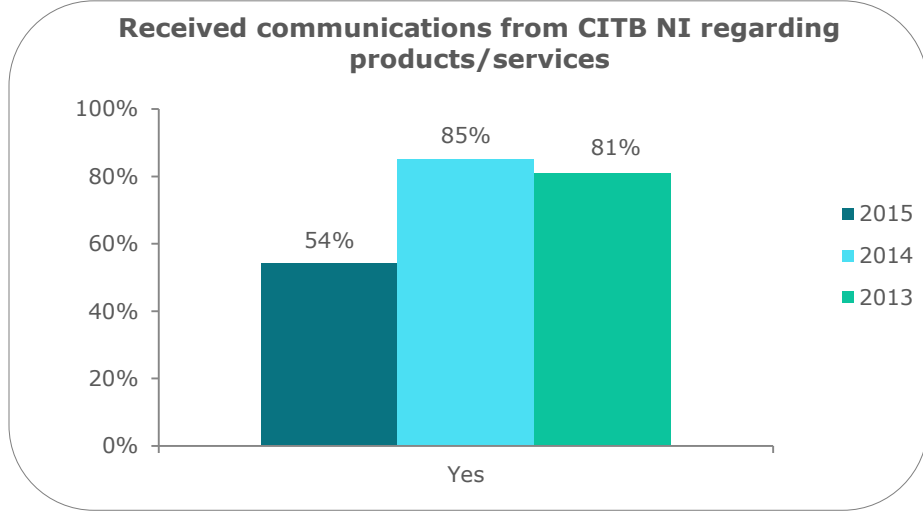
Satisfaction was high all round but there could be improvement in ease of navigation on the website



- ❖ Website users were asked to rate the website on a range of factors on a scale of 1 (very poor) to 5 (very good). In the graph scores of 4 and 5 have been combined, along with scores of 1 and 2, to give overall satisfaction and dissatisfaction levels.
- ❖ Mean scores are shown along side the chart, including means for 2014 and 2013.
- ❖ Most areas score well with about three quarters of the sample being satisfied with all aspects except for ease of navigation (59%).
- ❖ Results are broadly comparable to the last 2 years of data. They are very positive with low levels of negative responses across the factors and no instances of 'very poor' ratings. Having said this, there have not been any improvements on the results from last year.
- ❖ Reasons for rating the website poor were:
 - ❖ Over complicated / too much information (4 employers),
 - ❖ Difficult to navigate / poor layout (1 employer) and
 - ❖ A work tool / just serves as a function (1 employer).



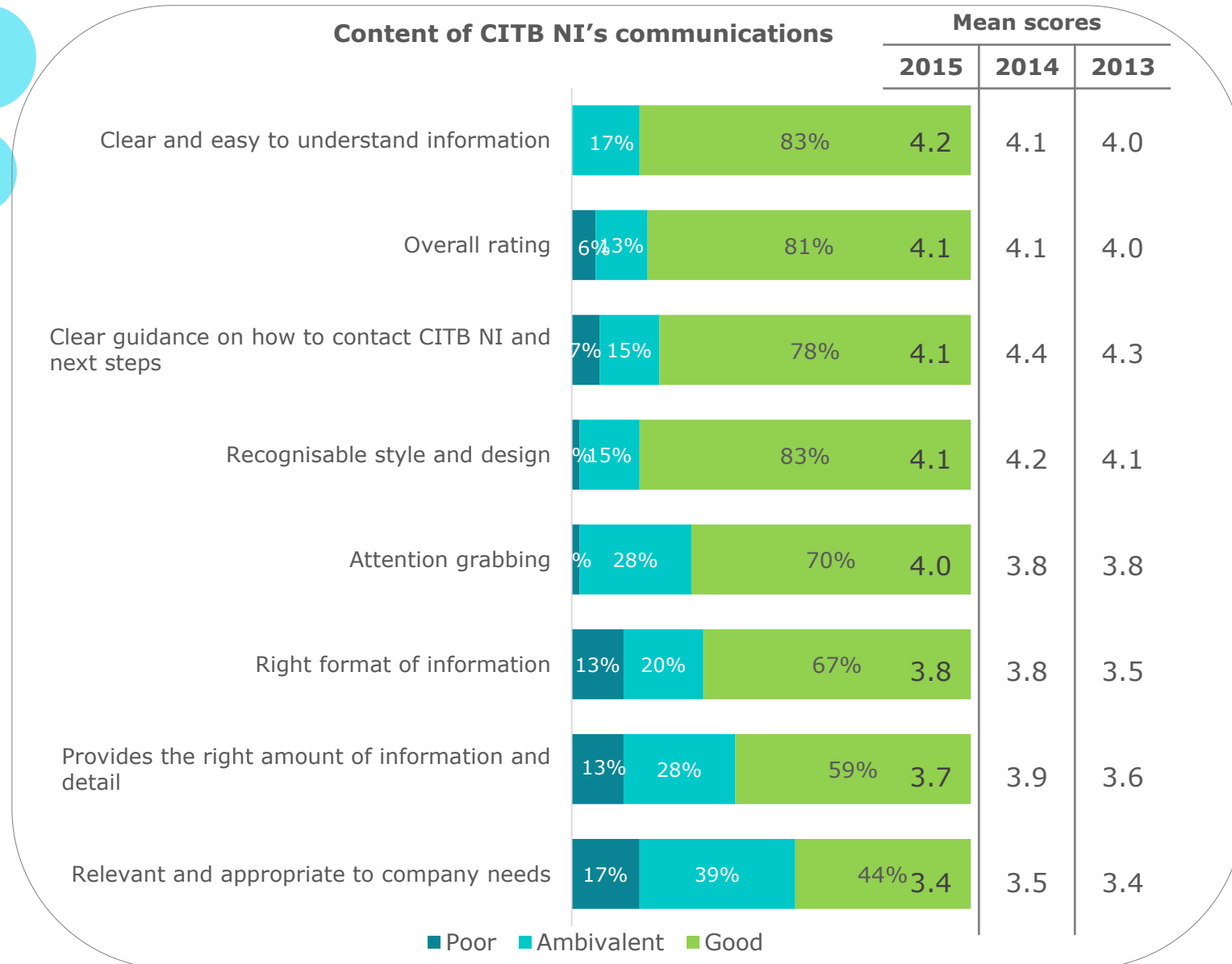
Just under three quarters of employers felt they get about the right amount of information



- ❖ Although the majority recall receiving communication from CITB NI in the last 12 months (54%), the proportion has fallen significantly since 2014 from 85% to 54%.
- ❖ Again this is linked to the micro businesses being a less engaged group but making up nearly the whole sample because 78% of small businesses recall having received communication but just 52% of micro businesses can recall this.
- ❖ Encouragingly, three quarters felt they received the right amount of information (72%), this is in line with the 2013 and 2014 findings.



Overall, eight in ten employers are satisfied with the content of CITB NI's communications



- ❖ The feedback on CITB NI's communications is very positive, with the vast proportion of the sample agreeing that communication has:
 - ❖ Style and design that you immediately recognise (83%)
 - ❖ Clear and easy to understand information (83%)
 - ❖ Clear guidance on how to contact CITB NI and what to do next (78%)
- ❖ All of the above are consistent with last year's findings.
- ❖ Scores for relevancy and level of information are the lowest, these are the areas that would benefit from further investigation to understand what it is that employers are less satisfied with.



Seven in ten small businesses were prompted to contact CITB NI after receiving communication from them

Preferred method for receiving information or communications from CITB NI

(2014 figures in brackets)	Overall	< 10 staff	10-49	50+
Base: received communication in the last 12 months	54 (85)	47 (52)	7 (25)	- (8)
Multiple answers allowed	%	%	%	%
E-mail	67 (61)	62 (54)	100 (72)	- (75)
Mail	44 (38)	51 (44)	0 (28)	- (25)
Phone	6 (4)	4 (4)	14 (4)	- (-)
Text message	4 (2)	4 (4)	0 (0)	- (-)

- ❖ When asked about their preferred method for receiving information and communications from CITB NI, the proportion of employers preferring information via email (67%) was higher than those that preferred to receive information in the post (44%).
- ❖ The findings are very similar to the findings from 2014.
- ❖ Among small businesses all employers prefer information via email, although one employer also selected by phone.
- ❖ 69% of the sample cited that communications arrived at about the right time of year for them to be useful. The remaining 31% could not remember or did not know. In the 2014 dataset, 86% of employers felt the communication they received from CITB NI arrived at about the right time.
- ❖ 28% of the sample were prompted to contact CITB NI for more information about their products or services after receiving communication from them. Previously this proportion was 48%.
- ❖ 71% of small businesses, compared to 21% of micro businesses were prompted to contact CITB NI after receiving communication. This highlights the difference between these employer groups.
- ❖ Where contact was made, 53% found it extremely useful and a further 13% found it useful. In previous years, the proportion has been higher, averaging at around 88% finding it useful compared to 66% in 2015.
- ❖ Just 7% of the sample (1 employer) did not find the information received useful.

The most common reason for contact over the past 12 months has been the levy and telephone is the most common method used to contact CITB NI



- ❖ 27% of the sample have contacted CITB NI in the past 12 months. Among those employers the main reasons for contact were regarding (responses cited by more than one individual):

- ❖ The levy (41%)
- ❖ Grants (33%)
- ❖ Standards and qualifications (7%)
- ❖ Research (7%)
- ❖ Information on BIM (7%)

- ❖ In the majority of cases, contact was made by telephone (78%) with email contact taking place just 15% of the time.

- ❖ One employer made contact at an employer event (4%) and another via the website (4%).

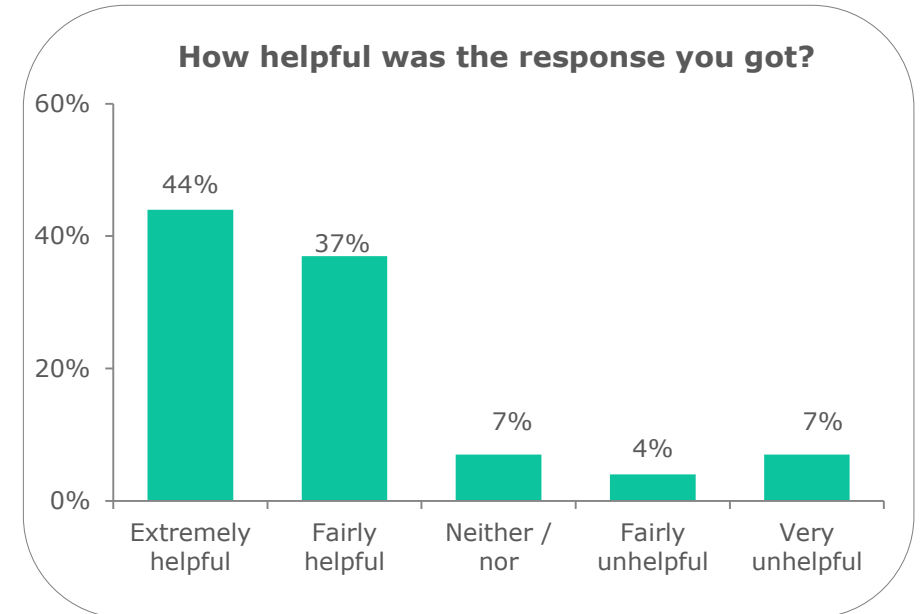
- ❖ Encouragingly, in 81% of cases, employers found the response helpful, with 44% finding the response very helpful. 2 employers found the response to be not at all helpful (8%).

- ❖ The reasons for not finding the response to be helpful were (each cited by one employer):

- ❖ *'Was paying two levies when setting up new company'*
- ❖ *'Person I contacted did not know what BIM was'*
- ❖ *'Nothing was available when I contacted'*

- ❖ Of those that had made contact, the majority were not sure how future contact could be improved (63%) and a further 30% cited nothing.

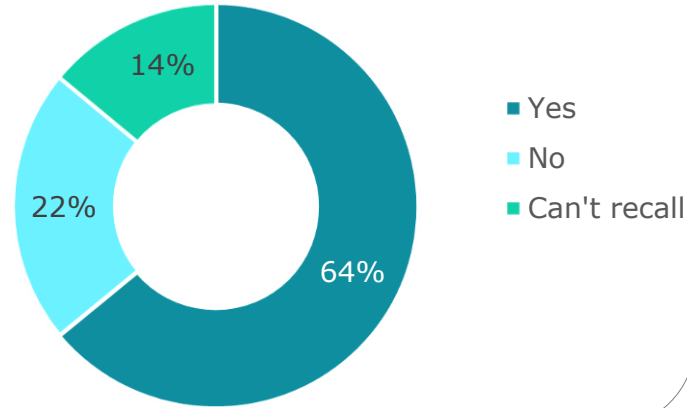
- ❖ One employer suggested *'providing more relevant training courses for their company'* and another suggested *'reducing the rate they pay'*.



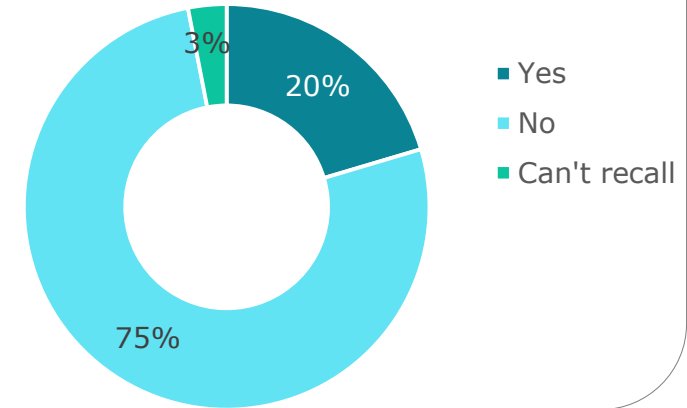
Nearly nine in ten small businesses that had received information about the Grants Scheme were encouraged to find out more



Did you receive information about the CITB NI Grants Scheme in the last 12 months?



Did the information you received encourage you to contact CITB NI to find out more?



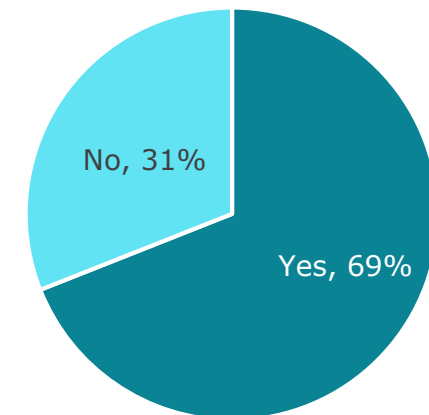
- ❖ 64% of employers had received information about the CITB NI Grants Scheme in the 12 months prior to the survey. This is a reduction on 2014, in which 81% had received information, although in line with the 2013 results (69%).
- ❖ Three quarters of levy payers had received information (76%), whereas among non levy payers the proportion falls to 60%.
- ❖ The proportion that recalled receiving information about the Grants Scheme is highest at 89% among small businesses. Comparatively for micro businesses the proportion is 62%.
- ❖ Of those that had received information, 22% were encouraged to contact CITB NI for more information. Levy payers were much more likely than non levy payers to have been encouraged to find out more (47% compared to 11% of non levy payers).
- ❖ In 2014, almost half (47%) of employers had been encouraged to contact CITB NI for further details and in 2013 the proportion was 33%. This year the proportion has more than halved, again this appears to be due to the change in sample make up.
- ❖ Of the 8 small businesses that had received information, 7 were encouraged to find out more (88%). For micros, the figure was low at just 13%.
- ❖ Of those that made contact, 64% claimed a grant for training undertaken as a result. Broken down by subsample this was: 57% of micro businesses and 71% of small businesses that made contact.



The majority of employers are aware that as a registered in-scope employer they are able to claim money to support the cost of training

- ❖ Of the 5 employers that made contact after receiving information about the CITB NI's Grant Scheme but didn't claim a grant, 36% were not aware that they needed to submit a levy return form in order to claim a grant.
- ❖ Of these 5 employers, 3 (60%) did not know why they did not claim a grant for training. For the two remaining, one said it was '*too time consuming*' and the other cited that '*they were currently in the process of claiming for a grant*'.
- ❖ Among the employers that were not prompted to contact CITB NI after receiving information about the Grants Scheme, the main reason for not doing so was because they did not need a grant (44%). Other reasons cited by more than one employer focussed on not having the need for training currently which is in line with the previous year's results. The responses were:
 - ❖ '*No training needed / not looking to train at the moment*' (22%)
 - ❖ '*Not looking to train at the moment due to lack of resources*' (12%)
 - ❖ '*It didn't apply to any of our training needs*' (8%)
 - ❖ '*Didn't require any more information*' (8%)
 - ❖ '*Not applicable to my company*' (4%)
- ❖ When asked what would encourage them to make a claim, 56% of employers were not sure. Other than this, the responses included: '*if grants for training were higher*' (10%), '*if we had a demand / the resources for training*' (10%), '*if grants were available for a wider range of activities*' (9%) and '*if making a grant claim was easier*' (4%).
- ❖ This is similar to the previous set of findings, indicating that employers will contact CITB NI if they feel there is a demand for them to undertake training and also there may be more interest if the grants could cover a wider range of courses.
- ❖ Over two thirds of employers are aware that as registered in-scope employers they are able to claim money to support the cost of training (67%).

Are you aware that as a registered in-scope employer you are able to claim money to support the cost of training?

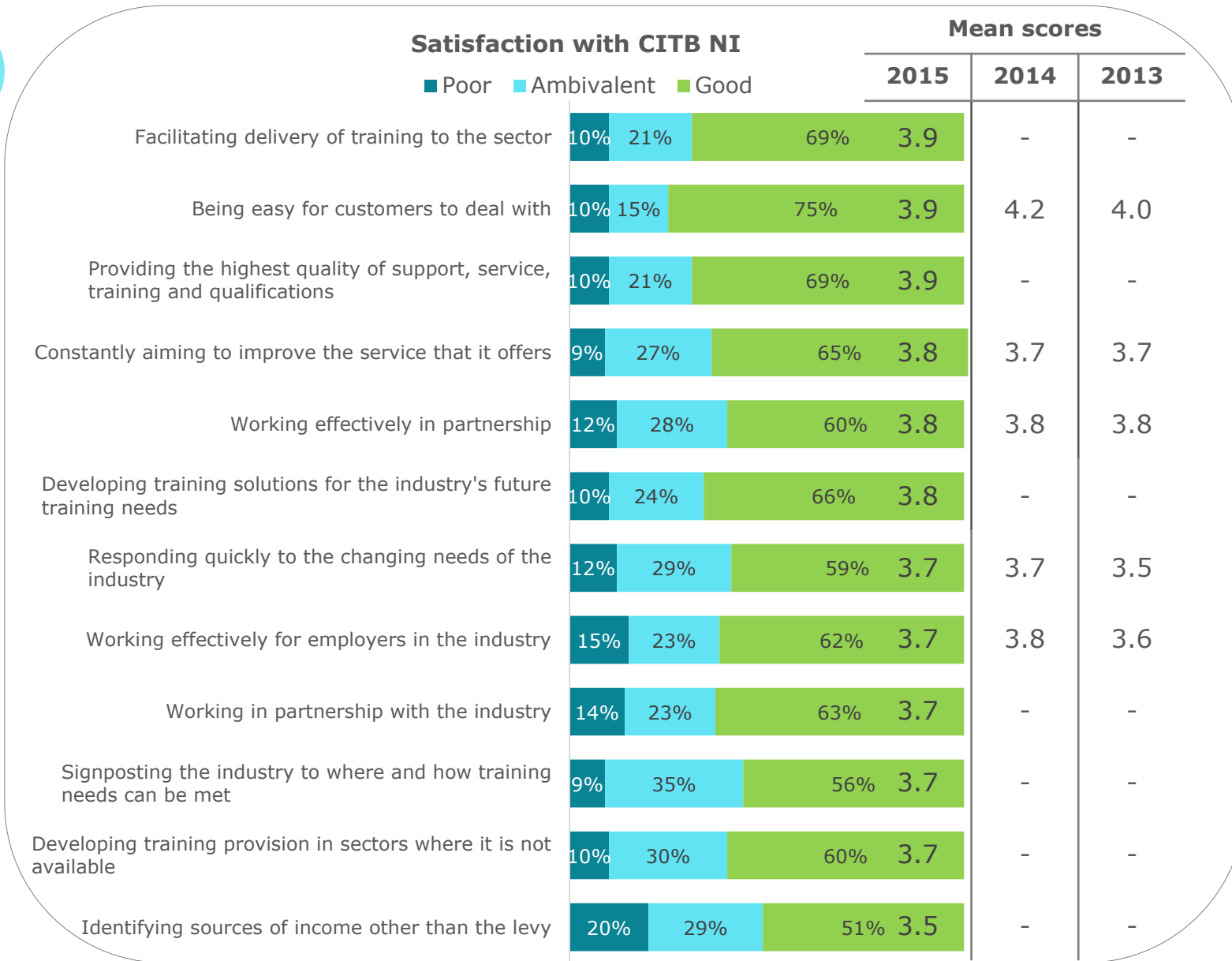


Overall opinions of CITB NI





Three quarters of employers find CITB NI easy to deal with



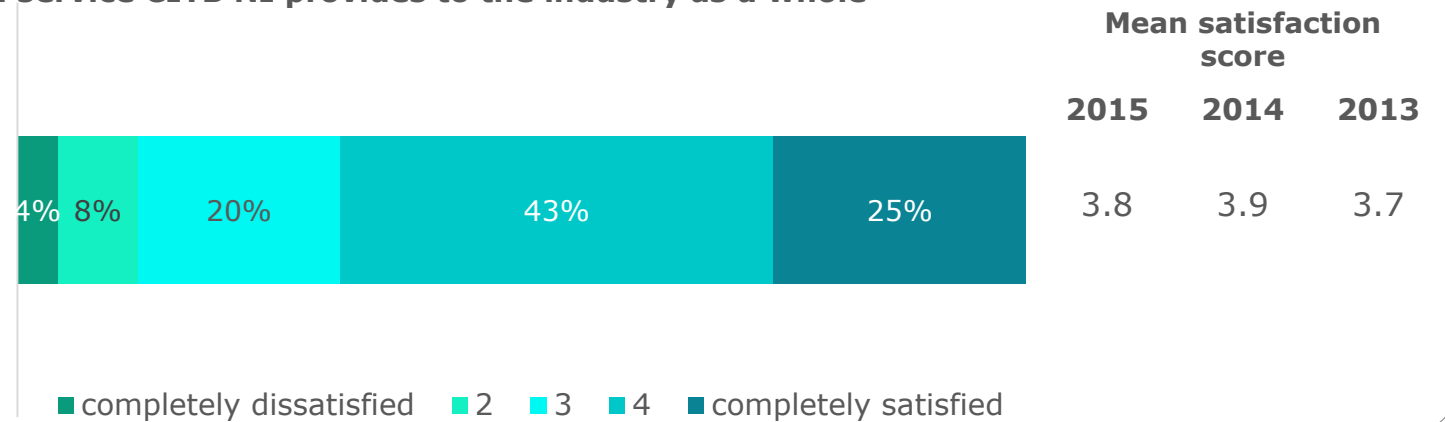
- ❖ Employers were asked to think about their overall opinions of CITB NI's performance. The chart looks at views of the service CITB NI provides to the industry as a whole.
- ❖ There is little differentiation between all measures and where comparison is possible, there is little differentiation year on year.
- ❖ Encouragingly, three quarters of employers feel that CITB NI are 'easy to deal with' (75%). Historically this has been the highest scoring area of service.
- ❖ Although, being easy to deal with has the highest level of satisfaction, there has been a slight reduction in the proportion of employers scoring CITB NI highly this year. This was witnessed equally among small and micro businesses with 75% of each subsample satisfied.
- ❖ The area CITB NI fare worst in is 'identifying sources of income other than the levy' with just over half of employers satisfied (51%).
- ❖ The high levels of ambivalence present in this chart suggests a lack of depth of knowledge among employers about what CITB NI do and how they do it.



Among dissatisfied employers there is a feeling of favouritism from CITB NI towards larger companies

Satisfaction with the overall service CITB NI provides to the industry as a whole

satisfaction with service provided to the industry as a whole



- ❖ When asked about how satisfied they are with the overall service CITB NI provides the industry as a whole, the majority of employers are satisfied (68%).
- ❖ Interestingly, satisfaction was higher among micro businesses than small businesses, with 70% of micro businesses satisfied compared to 56% of small businesses. Although, it is important to note the small subsample size for small businesses.
- ❖ Levy payers had lower levels of satisfaction with the service CITB NI provide the industry as a whole than non levy payers (61% compared to 71% respectively).
- ❖ Grant receivers were the most satisfied subsample (75%). Comparatively, 67% of non grant receivers were satisfied.
- ❖ 45% of those that were dissatisfied cited the reason was favouritism towards larger companies. This was cited by 50% of dissatisfied micro and 33% of dissatisfied small businesses. This was also cited by one employer in 2014.
- ❖ Other reasons cited by individual employers included: CITB NI not addressing low demand for construction work, no communication or support, they need to attract new people to the industry and not enough financial support provided through grants.

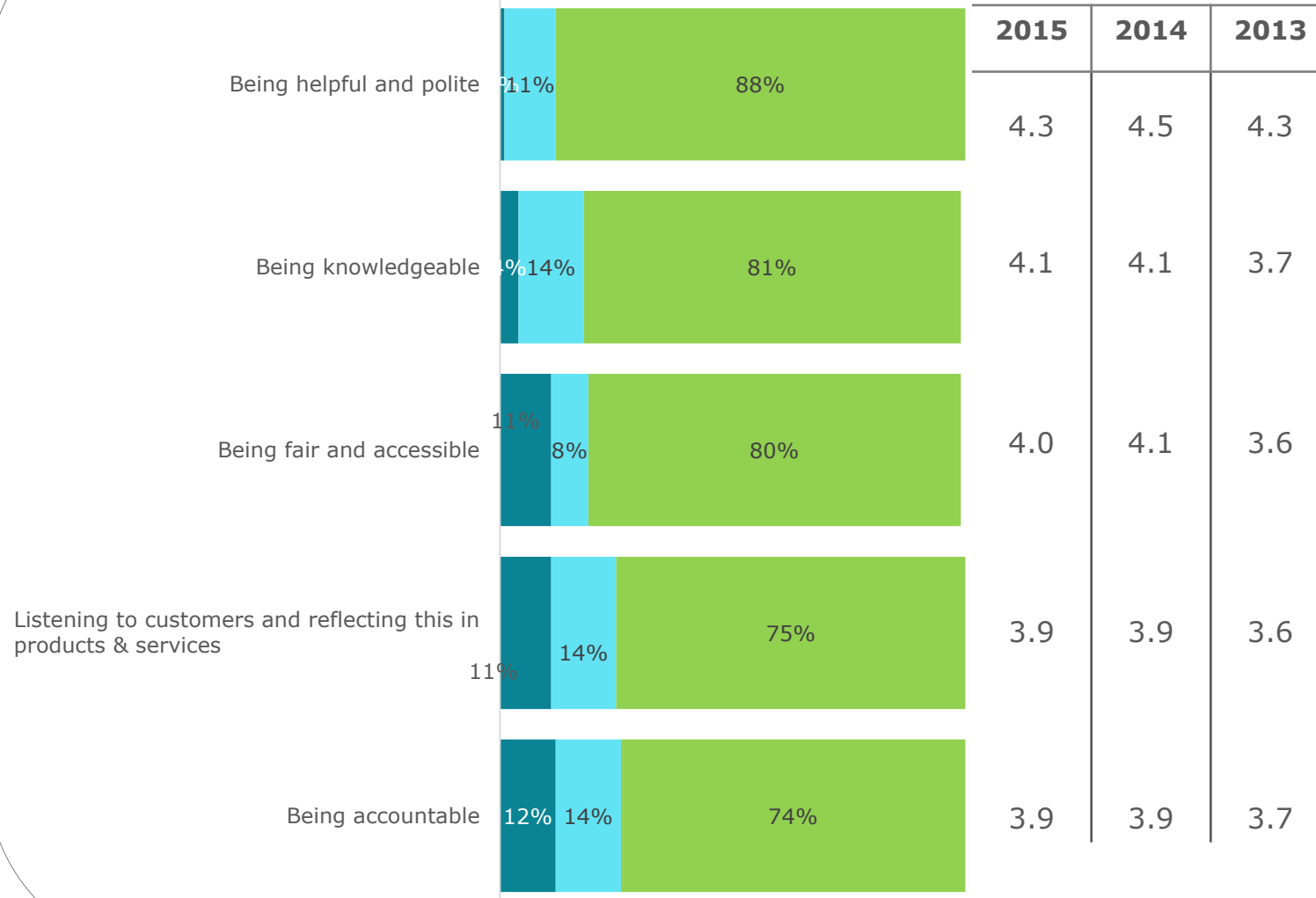


Employers rate areas of interaction with CITB NI highly across the board

Satisfaction with CITB NI

■ Poor ■ Ambivalent ■ Good

Mean scores

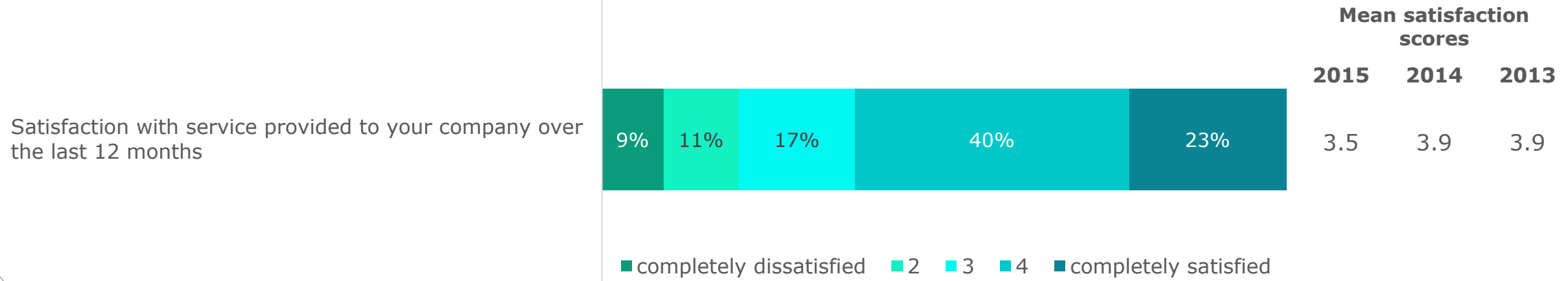


- ❖ Employers were also asked to rate their satisfaction with their own interactions with CITB NI.
- ❖ Levels of satisfaction are high across all factors and again there has been little deviation from previous data sets.
- ❖ However, there is one area that seems to be variable year on year, that is being fair and accessible. The variation is caused by changes in the levels of dissatisfaction and ambivalence rather than movement in satisfaction. This year 11% of employers were dissatisfied, whereas last year the proportion was 3%.
- ❖ Levels of satisfaction with being helpful and polite are the highest (88%), which has also been the case in previous years.

Levels of satisfaction have remained consistent, but there has been an increase in levels of dissatisfaction with the service CITB NI has provided at a company level



Satisfaction with the overall service CITB NI has provided your company over the past 12 months



- ❖ 62% of employers are satisfied with the overall service provided to their company.
- ❖ There is no difference in levels of satisfaction of levy and non levy payers (63% and 62% respectively). Similarly, there is little difference in levels of satisfaction of micro and small businesses (61% and 67% respectively). The largest difference witnessed is among grant receivers and non grant receivers. For those that have received a grant, 80% are satisfied with the service provided to their company. Comparatively, for those that have not received a grant, 55% are satisfied.
- ❖ There are higher levels of dissatisfaction with the service provided by CITB NI to individual businesses than to the industry as a whole (21% compared to 12% respectively).
- ❖ Although levels of satisfaction have not fallen since 2014 (62% in 2015 and 65% in 2014), levels of dissatisfaction have risen which is why the mean satisfaction score has dropped. In 2014, 9% of employers were dissatisfied, however, in 2015 this has risen to 21%.
- ❖ The main reasons given for dissatisfaction were: 'poor communication / difficult to get hold of' (45%), 'they take a levy but don't provide relevant service' (27%), 'service is biased towards big companies' (27%) and 'their service is irrelevant to our industry' (18%).
- ❖ In the 2014 survey, reasons for dissatisfaction also related to the levy, bias towards larger companies and irrelevant services.



Over half of small businesses would actively recommend that others contact and use CITB NI

❖ Employers were asked about whether they would recommend CITB NI to others and whether they had actually made such a recommendation in the past 12 months. Results on the first of these measures are shown on this slide.

❖ Over a third of employers would proactively recommend CITB NI. This is in line with proportions witnessed in 2014 and 2013.

❖ Among micro businesses, 35% would proactively recommend others contact and use CITB NI. Comparatively among small businesses this proportion rises sharply to 56%.

❖ 60% of grant receivers would proactively recommend compared to 33% of non grant receivers.

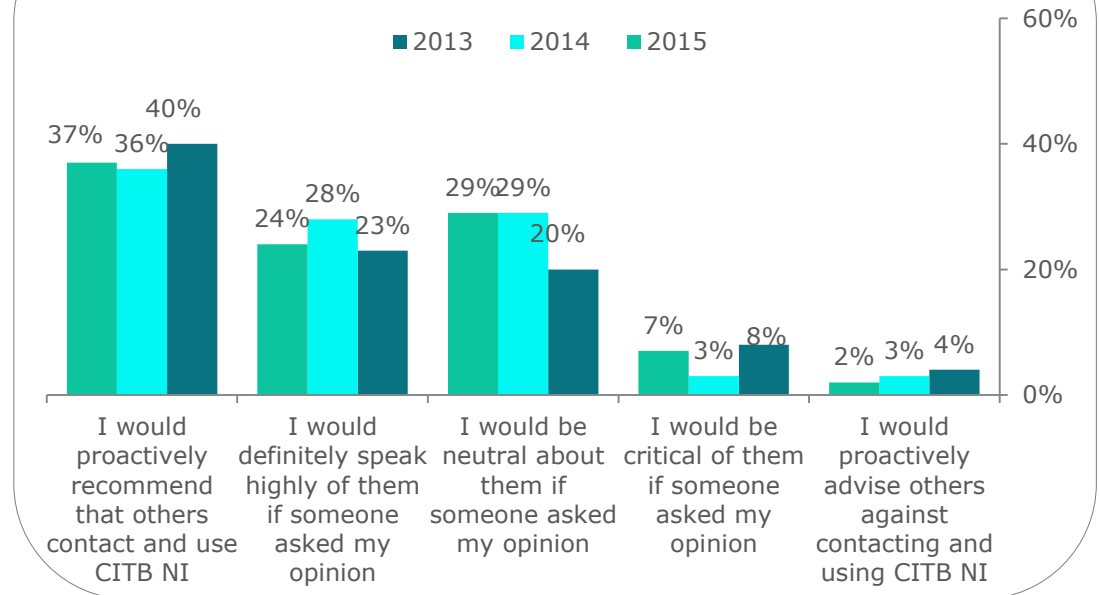
❖ Levy and non levy payers are similar with 40% of levy payers and 36% of non levy payers citing that they would proactively recommend CITB NI.

❖ The net promoter score, the proportion that would recommend or speak highly of CITB NI minus those that would be critical or actively recommend against usage, is 52%. In 2014 the NPS score was 58% and in 2013 it was 51%. Therefore, allowing for sample size, there has been little differentiation across the past 3 years.

❖ Among grant receivers the NPS is 67%. This is the most valuable group in terms of word of mouth advertisement of what CITB NI can offer to employers in Northern Ireland.

❖ Among employers that were ambivalent or negative, the reasons for their response were focussed on the levy, relationship with CITB NI and communication; lack of association with them (38%), pay levy but get nothing back (11%) and poor communication / don't get back to me (11%).

Likelihood to recommend CITB NI

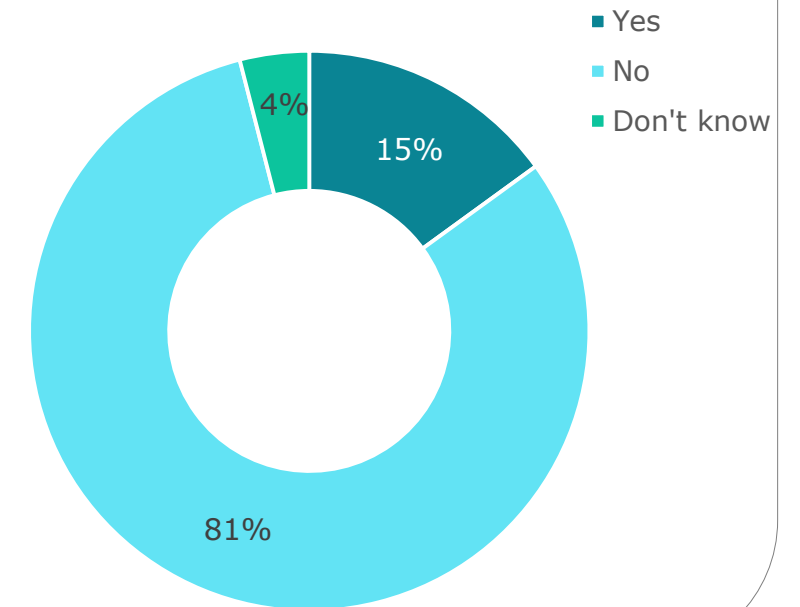




The proportion of employers that have actually recommended CITB NI in the past 12 months is less than 1 in 5

- ❖ Although 37% of employers said they would actively recommend CITB NI, just 15% had actually done so.
- ❖ Employers were asked what CITB NI could do to improve their service and relationship with them. 28% of employers cited don't know / not sure and a further 26% cited nothing.
- ❖ More constructive responses included:
 - ❖ *'Be more engaging / better communication'* (14%)
 - ❖ *'Do more for smaller companies'* (8%)
 - ❖ *'Bring back reps / face-to-face communication'* (6%)
 - ❖ *'Encourage / help us encourage more young people into construction'* (3%)
 - ❖ *'More information on services'* (3%)
 - ❖ *'Provide more help for in-house training'* (3%)
 - ❖ *'Reduce levy price'* (3%)

Have you recommended CITB NI to anyone in the past 12 months?



Employer engagement





The majority of employers are aware of engagement events, although only half of these have attended one

What topics would encourage you to attend employer events



- ❖ Awareness of employer engagement events was assessed for the first time in 2014 when 77% of employers stated they had heard of the service.
- ❖ 70% of employers from the 2015 data set were aware of employer engagement events and 39% of these had attended one or more of the events.
- ❖ Awareness was highest among small businesses and grant receivers (89% and 88% respectively).
- ❖ It was lowest among micro businesses and non levy payers (68% for both). This is an unsurprising finding given that these groups are less well informed about CITB NI in general.
- ❖ It was the minority of employers that could provide a response for what it is that they would like to see at employer events. This indicates that it may be necessary to include some persuasive measures to encourage employers to the events as well as offering the right kind of information.
- ❖ The main topics that should be included in engagement events are grants and information covering all aspects of training and advice for training.

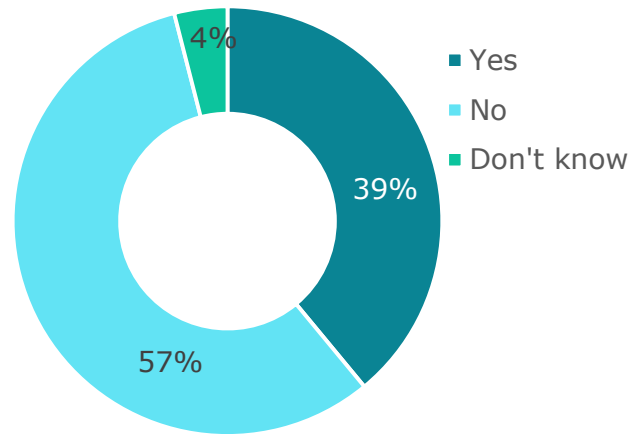
Support for the levy and grant system



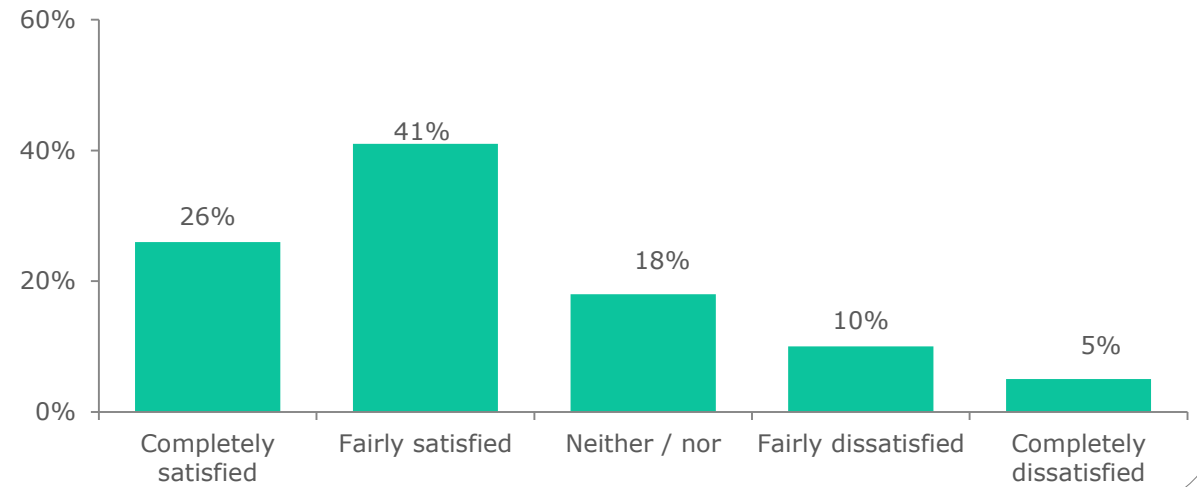


Nearly 4 in 10 employers have used the online levy return facility

Have you used CITB NI's online levy return facility?



How satisfied have you been with this service?



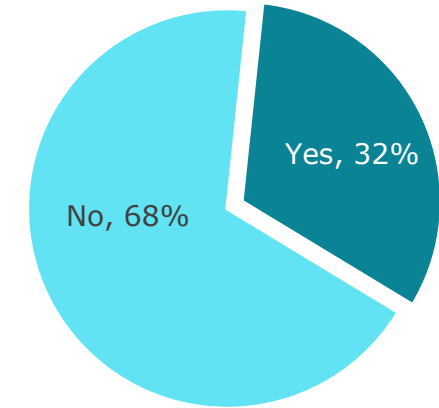
- ❖ 39% of employers had used the online levy return facility.
- ❖ Among the subsample of levy payers the proportion was 64%. Among small businesses it rose to 78%.
- ❖ For grant receivers, 69% had used the online levy return facility compared to 33% of non grant receivers.
- ❖ For employers that had used the online levy return facility, a quarter were completely satisfied (26%) and a further two fifths fairly satisfied (41%). Overall two thirds of users were satisfied with the service (67%).



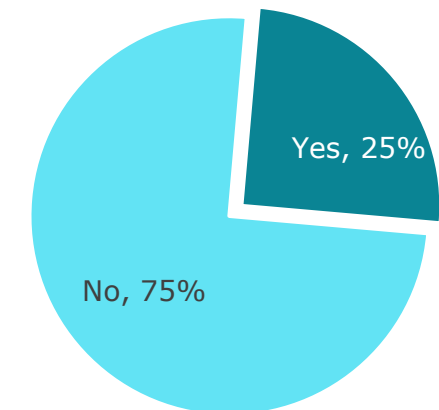
Awareness of the benefits accessed by completing the levy return form online and paying by Direct Debit or BACS is low

- ❖ Just a third of employers were aware that there would be an additional 1.5% added to any grant claim if the levy return form is completed online (32%).
- ❖ As may be expected, awareness is highest amongst:
 - ❖ Levy payers (56% compared to 24% of non levy payers)
 - ❖ Small businesses (56% compared to 30% of micro businesses)
 - ❖ Grant receivers (69% compared to 25% of non grant receivers)
- ❖ Awareness of the additional 1.5% added to any grant claim if the levy is paid by Direct Debit or BACS is even lower at just a quarter of employers (25%).
- ❖ Again, awareness is highest among the same subsamples, however, remains below 50% for all groups:
 - ❖ Levy payers (36% compared to 21% of non levy payers)
 - ❖ Small businesses (33% compared to 24% of micro businesses)
 - ❖ Grant receivers (44% compared to 21% of non grant receivers)
- ❖ In terms of payment methods, 41% were aware that they could pay in two equal instalments in October and February at no extra cost. 36% were aware that they could pay by direct debit over 10 months at no extra cost.
- ❖ Therefore, these benefits are clearly an area that CITB NI could publicise more among employers so that they can make full use of them.

Are you aware that an extra 1.5% is added to any grant claim if you complete the levy return form online?



Are you aware that a further 1.5% is added to any grant claim if you pay your levy by Direct Debit or BACS?





The grant was most commonly used to undertake Health and Safety training

- ❖ 16% of the sample had received a grant, this is comparatively low when looking at 2014's data set (56%), perhaps due to sampling structure this year.
- ❖ Two employers within this subsample did not / could not answer what type of training their grant was for. There were four employers that were not classified as grant receivers at Q41 although recalled having a grant and using it for training at question S3 or Q17, these employers have been included in the figures.
- ❖ The chart on the following slide shows what employers had used or claimed a grant for, with the figures in the table showing the proportion saying the grant had been a positive factor in undertaking the training (i.e. employers who did not feel that they would have undertaken the training anyway).
- ❖ Note due to the low subsample size of just 16 employers, there are high levels of variability among the responses and when broken down by training type, subsamples of 1 or 2 respondents have resulted in some results not being comparable with the previous data set from 2014.
- ❖ The grant was most commonly used to undertake Health & Safety training (50%). Followed by off-the-job training (44%) and Industry Registration (Card) Scheme (33%). The availability of the grant was a positive factor in enabling the employer to undertake the training in between two thirds to three quarters of cases.
- ❖ In 2014, the Industry Registration (Card) Scheme was the most common use of a grant (86%) and 92% of these employers felt the grant enabled them to undertake the training. The 2015 data set does not reflect this finding likely because there has been a reduction in the proportion of the sample that has had a grant, so high levels of variability in the results.
- ❖ The top four most common usages of the grant were the same in 2014 and 2015, although there was a change to the ordering.



The same four types of training were most commonly cited this year as last year



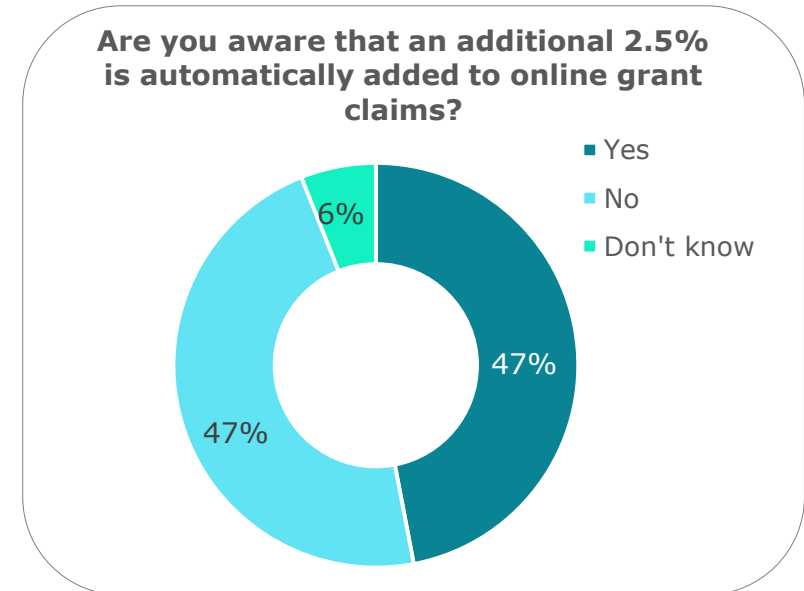
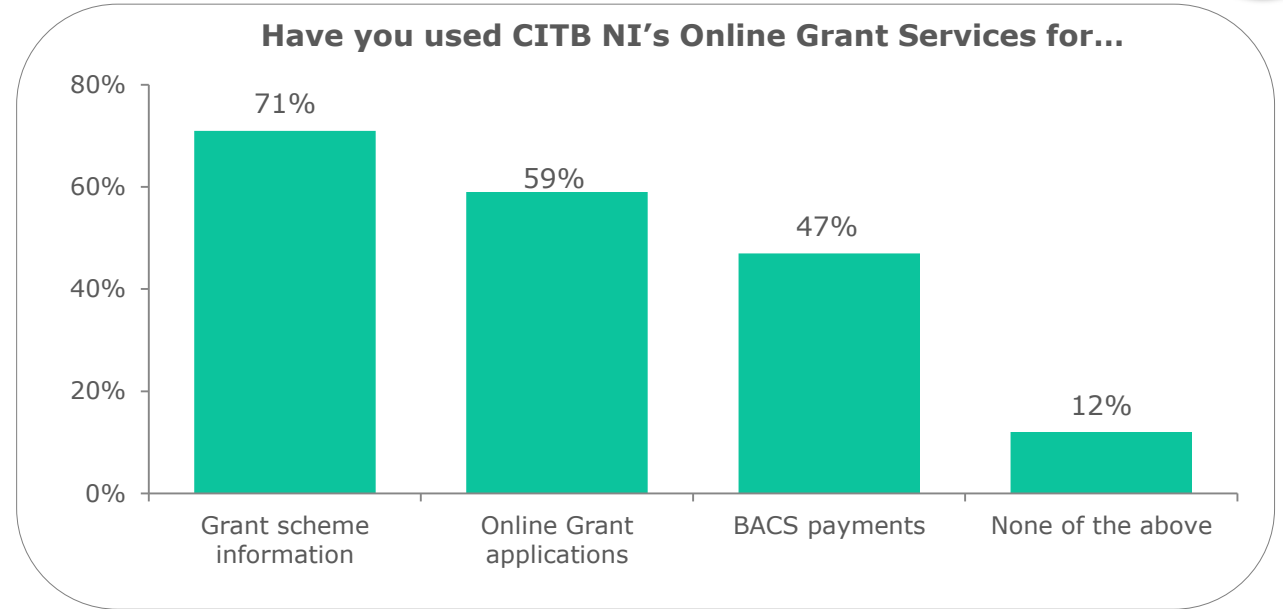
Training purpose that grant was used for and whether it was a positive factor in undertaking training

		2015 positive factor	2014 training purpose	2014 positive factor
Health and Safety	50%	67%	71%	100%
Off-the-job training	44%	75%	75%	90%
Industry Registration (Card) Scheme	33%	67%	86%	92%
Technical, supervisory & management	17%	67%	55%	87%
NVQs	17%	67%	36%	95%
Training in partnership with industry bodies	11%	0%	25%	93%
3rd party accreditations	6%	0%	29%	94%
Training via the Mobile Training Unit	6%	0%	36%	100%
Apprentices		-	20%	91%
Undergraduate Development Programme		-	7%	100%
In-house training		-	32%	94%



Half of employers were aware that they could benefit from an extra 2.5% added to their grant claim if they submit online grant applications

- ❖ Among grant recipients, the majority have accessed CITB NI's Online Grant Services for grant scheme information (71%) and online grant applications (59%). Just under half have used it for BACS payments (47%).
- ❖ 47% of the subsample were aware that an additional 2.5% is automatically added to online grant claims.
- ❖ Therefore, over half of employers claiming for grants are unaware that they could add to their grant by applying online. This is another area that employers would benefit from CITB NI communicating more.
- ❖ Of the employers that have used CITB NI's Online Grant Services for online grant applications, 75% were aware that an additional 2.5% is automatically added to online grant claims. This is a significant increase on the 2014 figure of 8% awareness. It would be a highly informative task to compare any communications regarding the benefits of online grant applications in 2014 and 2015 as there appears to have been a significant upsurge in awareness.





Nearly 9 in 10 employers are satisfied with the ease of claiming a grant

- ❖ Satisfaction with ease of claiming a grant is very high, with 88% of employers satisfied. The same finding was observed in 2014.

- ❖ There were levels of dissatisfaction that were not present in the 2014 data set.

- ❖ The two factors with the highest levels of dissatisfaction were:

- ❖ 'The speed of grant payments' (25%)
- ❖ 'The range of courses for which grants are available' (18%)

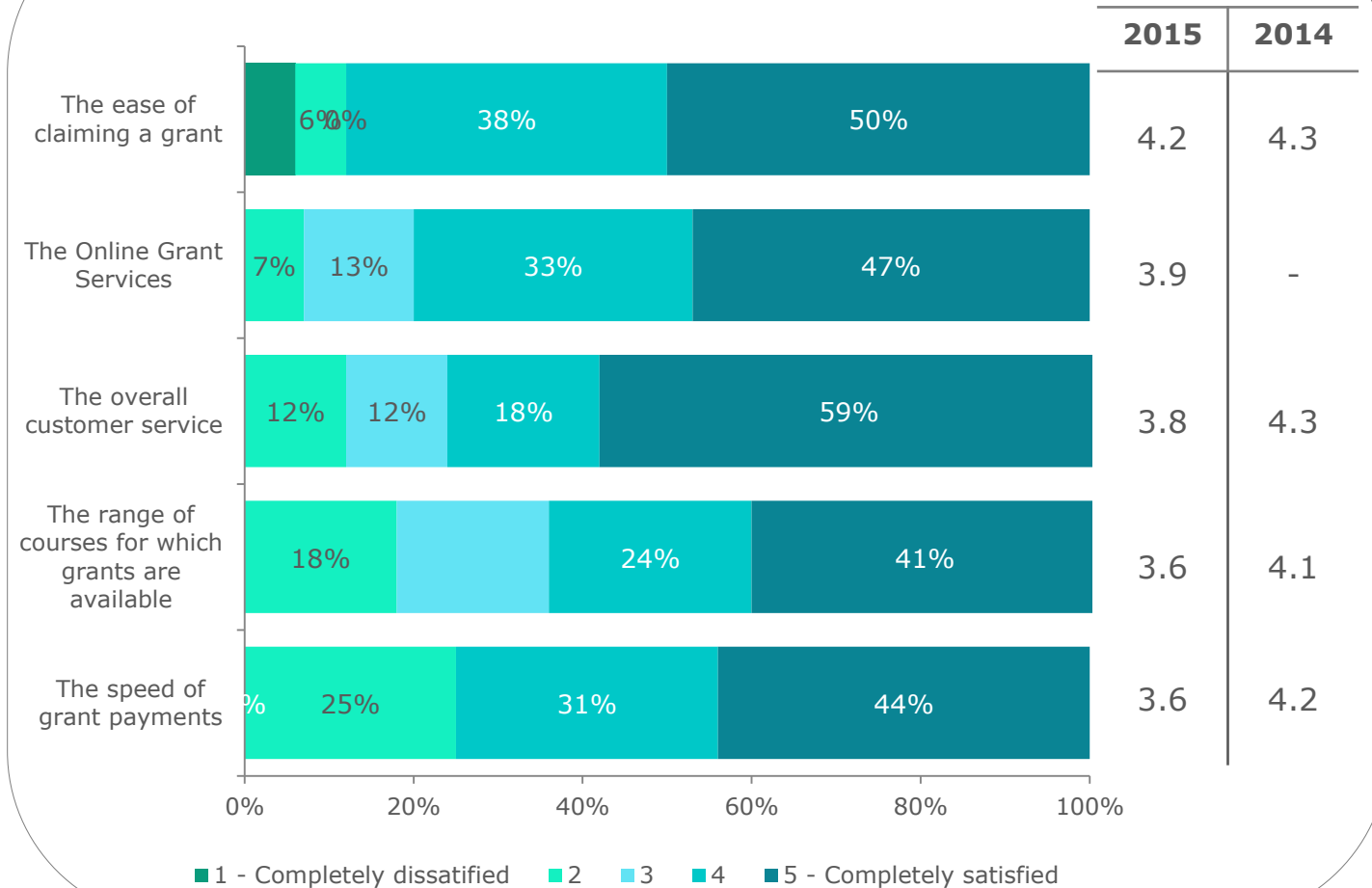
- ❖ The majority of employers could not cite an improvement to the current scheme (81%).

- ❖ Among those that could give a response, most commonly cited was higher level of grant aid (53%).

- ❖ Employers also cited:

- ❖ 'More grants information and awareness' (42%)
- ❖ 'Grants to cover wages / travel expenses' (32%)
- ❖ 'Simplify application process' (26%)
- ❖ 'Grants to cover more courses' (21%)

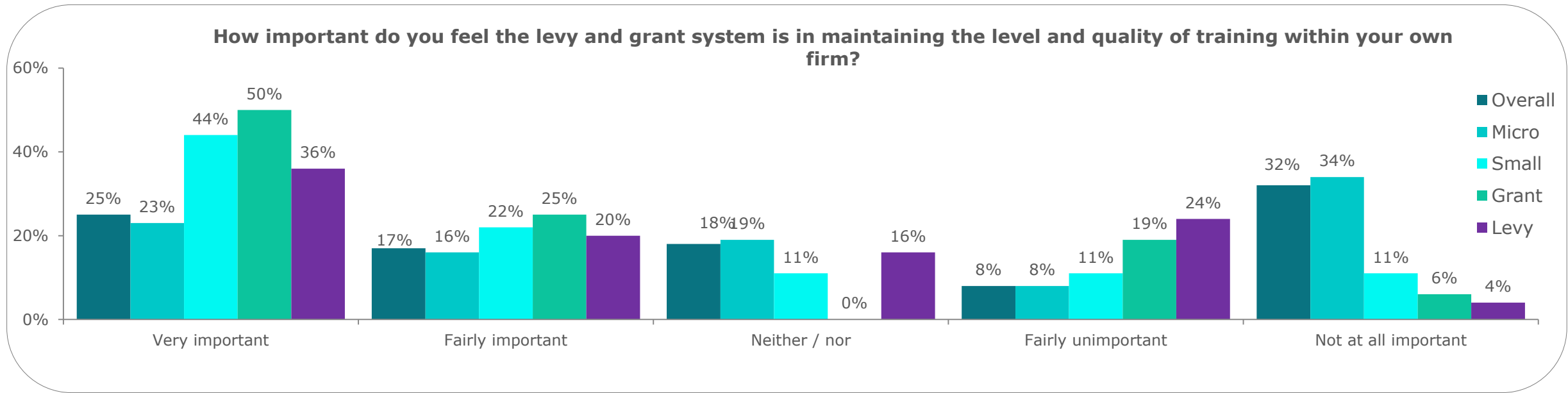
How satisfied have you been with the following aspects of the grant process?



There are mixed attitudes towards the value of the Levy-Grant scheme when employers think of it in terms of importance in their own business



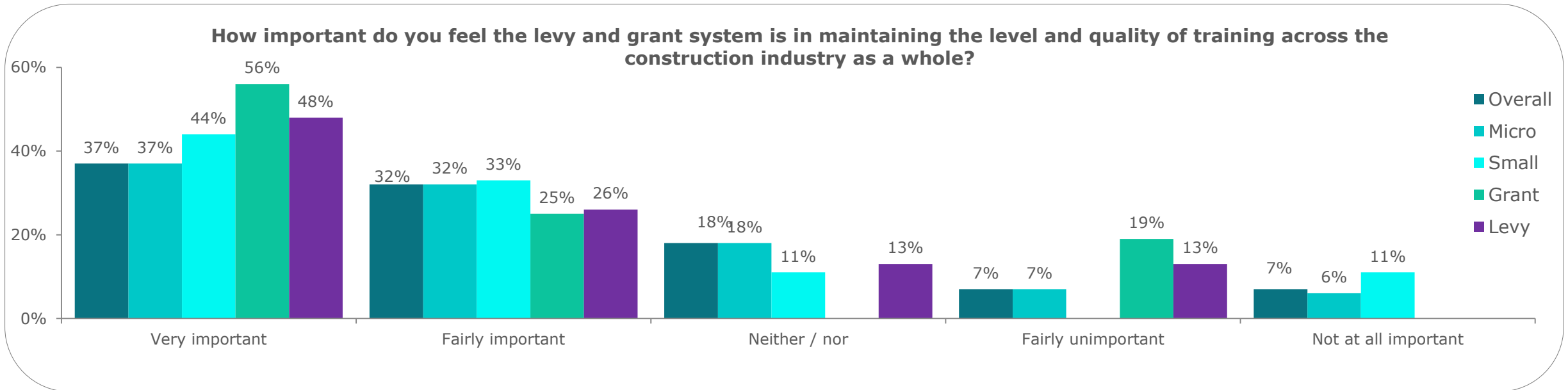
- ❖ All employers were asked to rate the importance of the Levy-Grant system in maintaining the level and quality of training within their own firm.
- ❖ There are quite mixed attitudes towards the importance of the levy and grant system when applied to employer's own businesses. 42% of employers felt it is important and 40% felt it is unimportant.
- ❖ Grant receivers and small businesses are most likely to feel it is important (75% and 67% respectively).
- ❖ In the 2014 data set, 61% of employers felt the Levy-Grant scheme was important in maintaining the level and quality of training within their company. Again this difference between data sets reflects the lower proportion of micro businesses that were in the 2014 sample compared to the 2015 sample.





Employers are more likely to feel the Levy-Grant system benefits the industry as a whole than their own business

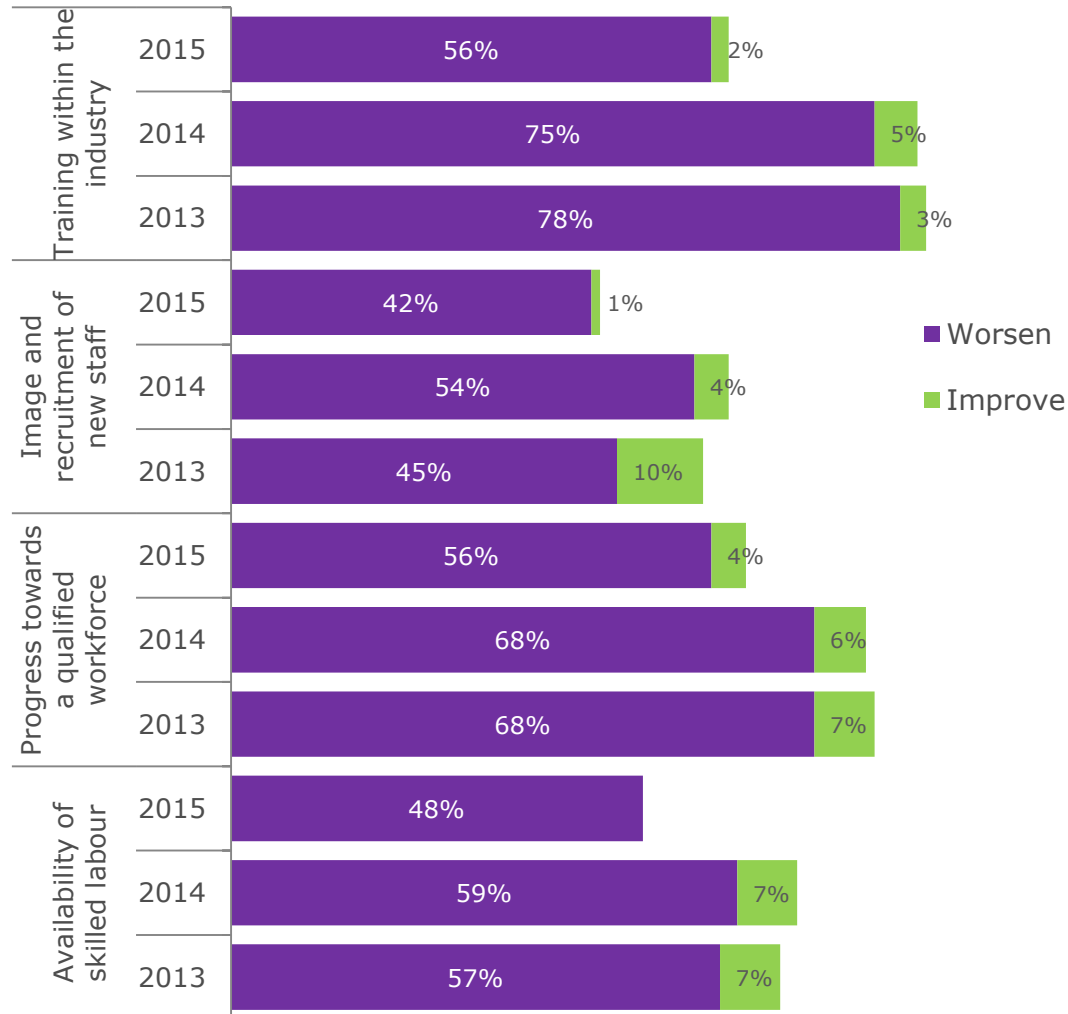
- ❖ 69% of employers felt that the Levy-Grant system is important in maintaining the level and quality of training across the construction industry as a whole. This is similar to the proportion witnessed in the 2014 survey (74%) and the 2013 survey (66%).
- ❖ Over half of grant receivers feel that it is **very** important to the construction industry as a whole (56%) and 8 in 10 grant recipients feel it is important (81%).
- ❖ Employers feel there is a benefit from the levy and grant system for the construction industry as a whole, even if they do not feel there is benefit for their own company.





Employers see a clear risk to training and recruitment if there was no statutory training body such as CITB NI

If there was not a statutory training body such as CITB NI, what impact would this have on the industry as a whole in terms of...

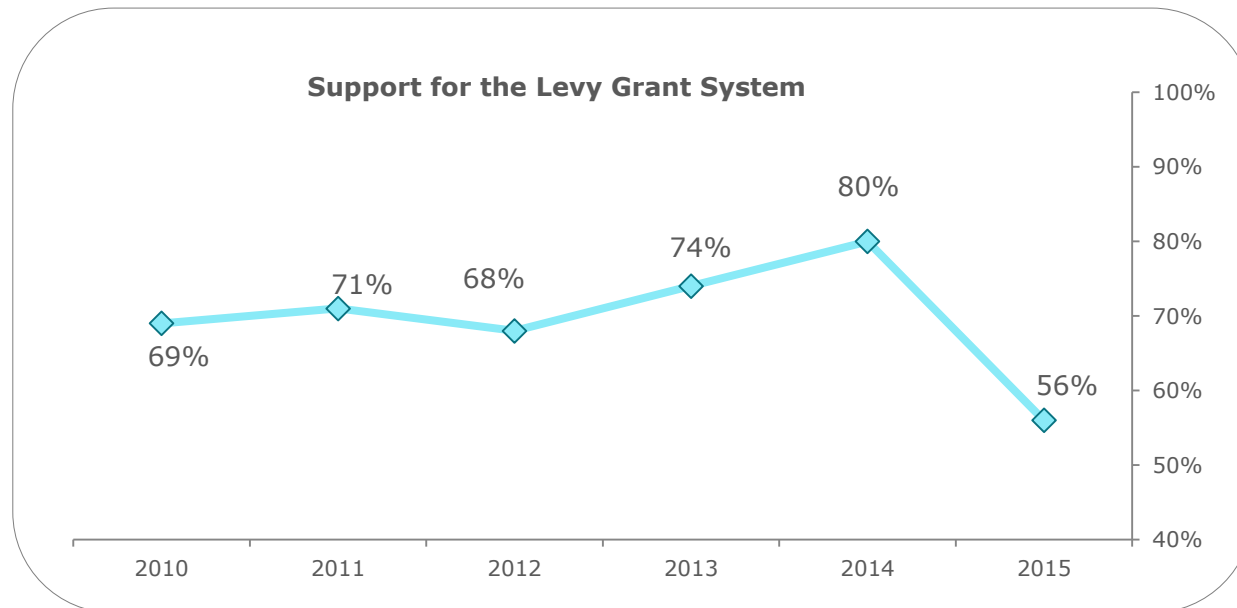


- ❖ This chart shows employers' perceived impact of having no statutory training body to provide grants for training.
- ❖ Employers were questioned about four specific areas (shown in the chart) and asked if having no grant provision would worsen or improve the situation across the industry, or have no effect. For simplicity, just those saying they think it would worsen or improve are shown.
- ❖ It is encouraging that many more employers think if there was no statutory body providing grants for training then: training within the industry, progress towards a qualified workforce, availability of skilled labour and industry image would get worse rather than improve.
- ❖ Training within the industry and progress towards a qualified workforce were seen as the areas that would suffer the most without grants, with over half of employers feeling the levels of training would reduce (56%).
- ❖ As has been the case throughout the report, proportions have changed when compared with the 2014 and 2013 figures, mainly due to a change in the sample make up. However, the overall picture from the results is the same.

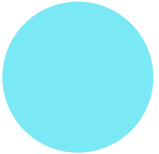


There has been a fall in the proportion of employers that believe the Levy-Grant system should continue

- ❖ Whilst the majority of employers believe that the Levy-Grant system should continue (56%), this is a sharp drop from previous years (80% in 2014 and 74% in 2013) and it is not clear if it is solely due to the change in sample make up because the proportion that believe it should continue among both small and micro businesses is 56%.
- ❖ As would be expected, support was highest among employers that had received a grant in the previous 12 months (67%).
- ❖ Interestingly, non levy payers are more supportive than levy payers (69% compared to 55%), probably as they are getting the benefits of the grant etc. but not contributing to the levy.
- ❖ Among the employers that do not feel the levy-grant system should continue, 53% say so because they believe it has no real benefit to them. For a further 40% the reason is because it favours larger companies.
- ❖ Other responses included: it's an unnecessary expense / additional tax (33%). It's a waste of money / we don't get a worthwhile return (20%). Overall, responses were similar to those given in 2014.



Conclusions & Recommendations





Conclusions



- ❖ There was a change to the sample make up this year that prompted some differences throughout the results. Due to a very high proportion of Micro businesses within the sample, there were lower levels of levy payers and grant receivers than are usually present within the data set, when comparing to past years. Therefore, there have been some significant differences in the findings and where this can be attributed to the sample it has been pointed out.
- ❖ The main concern within the industry is a skilled labour shortage, this has been the case for some time now after concern started to build in 2013 and has increased across 2014 and 2015. Prior to 2013, employers were less likely to feel there were issues facing the industry, particularly a skilled labour shortage.
- ❖ An interesting finding is that unprompted awareness of CITB NI's training courses has risen year on year since 2011, whereas, for other products and services, this has not been the case. 9 out of 10 employers are aware, once prompted, that CITB NI provides grants for training and health and safety information and training. The organisation is less associated with areas such as conducting research and providing Labour Market Intelligence and delivering projects where funding has been secured from external sources.
- ❖ Despite an overall reduction in the proportion of employers that have used CITB NI's services due to the sample make up, the most commonly used service was still grants for training, followed by health and safety information and training as was the case in 2014.
- ❖ Employers are most likely to have heard about CITB NI via email or through the post. There was very low awareness of CITB NI's social media sites. Given that email was the preferred form of communication to post by a ratio of two thirds to two fifths, employers are open to online interaction with CITB. Therefore, there may be a benefit from greater development and promotion of CITB NI's social media sites.
- ❖ Small businesses are highly likely to recall receiving information from CITB NI and also they are highly likely to act on the information they receive. 9 in 10 small businesses that had received information about the Grants Scheme were encouraged to find out more. Therefore, communication with this group of employers is highly beneficial.
- ❖ Users of the CITB NI website were satisfied with all aspects of the site, although improvements could be made in ease of navigation. The most common uses of the website were for completing the levy return and looking at Grant Scheme information.
- ❖ Employers were asked to think about their overall opinions of CITB NI's performance in terms of the service provided to the industry as a whole. Encouragingly, three quarters of employers felt that CITB NI are easy to deal with and historically this has been the highest scoring area of service. The area CITB NI fare worst in is identifying sources of income other than the levy with just over half of employers satisfied.
- ❖ There does appear to be an element of lack of knowledge about what CITB NI do and how they do it among employers because many areas of service have high levels of ambivalence which brings the overall mean scores down.



Conclusions

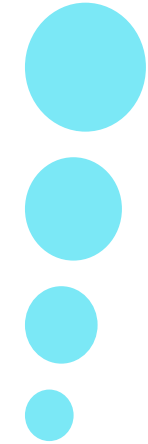
- ❖ Employers were also asked to rate their satisfaction with their own interactions with CITB NI and the results were positive with satisfaction above 80% for 3 of the 5 factors and above 70% for all 5 factors. The level of satisfaction with being helpful and polite was the highest, which has also been the case in previous years.
- ❖ In cases where employers are dissatisfied with CITB NI, a reason cited by a handful of employers has been that CITB NI favour larger organisations. Therefore, this is an area that should be addressed to ensure that smaller businesses do not feel they cannot engage with CITB NI in the same way that larger businesses can.
- ❖ Unsurprisingly, grant receivers are the most valuable group in terms of word of mouth advertisement of what CITB NI can offer to employers in Northern Ireland. Grant receivers have the highest net promoter score of all subsamples.
- ❖ Despite awareness of employer engagement events being high, it was the minority of employers that had attended one. Again as expected, the more engaged groups of grant receivers and small businesses were most likely to be aware of such events. Very few employers could provide a response to what it is that they would like to see at employer events. This indicates that without incentive or clear vision of how they can benefit by attending such events, micro businesses and unengaged employers will be unlikely to attend in the future.
- ❖ Awareness of the benefits accessed by completing the levy return form online and paying by Direct Debit or BACS is low among all employers. This is an area that may require more publicising by CITB NI to encourage employers to partake in the schemes.
- ❖ Of the employers that have used CITB NI's Online Grant Services for online grant applications, three quarters were aware that an additional 2.5% is automatically added to online grant claims. This is a significant increase on the 2014 figure of 8% awareness, although base sample sizes are low. It would be interesting to compare any communications regarding the benefits of online grant applications in 2014 and 2015 to see if there is a difference as there appears to have been a significant upsurge in awareness which currently cannot be explained.
- ❖ There are quite mixed attitudes towards the importance of the levy and grant system when applied to employer's own businesses, with equal proportions feeling it is important and unimportant. However, the majority of employers feel that the Levy-Grant system is important in maintaining the level and quality of training across the construction industry as a whole.
- ❖ Employers see a clear risk to training and recruitment if there was no statutory training body such as CITB NI, with the feeling that training within the industry and progress towards a qualified workforce would suffer the most without grants.
- ❖ The majority of employers feel that the Levy-Grant system should continue, although the proportion that feel this has fallen this year when compared to previous years.



Recommendations



- ❖ Given the low awareness of CITB NI's social media sites, there could be a benefit from promoting these more among employers and using them as a medium for educating employers on what is available to them.
- ❖ Employers are generally satisfied with CITB NI's website, although improvements could be made to the ease of navigation within the site. CITB NI may benefit from carrying out some additional research into what it is in particular employers would like to improve and how they would like to navigate around the site.
- ❖ There is a feeling among some employers that CITB NI favours larger businesses, this could be something that is addressed through the employer engagement events or by more tailored communication to micro employers.
- ❖ CITB NI could provide more encouragement for micro businesses to attend the employer engagement events by communicating in a clear and concise way how the event can benefit their business.
- ❖ Increased publicity surrounding the benefits that come with actions such as returning the levy form online or paying by Direct Debit or BACS is needed because currently awareness of the benefits is low, even among the engaged groups of employers.





Fresh

Clear

Bright

Bold