



CITB ESR 2016 NI Report

Powered by Turquoise Thinking for CITB NI



Introduction and methodology

- CITB NI provided data files to Turquoise Thinking Ltd for the analysis of the 2016 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. Note that this report details the findings of Northern Ireland employers and stakeholders. Employer and stakeholder views from across Scotland, England and Wales are reported upon separately.
- Where appropriate, findings from the research conducted in 2013, 2014 and 2015 have been included. Please note that whilst we have compared to 2013 and 2014, the sample profile was slightly different and a rebalancing of the sample took place in 2015 to bring it more into line with NI Levy Register.
- To ensure comparability, the methodology for the 2016 survey was designed to replicate that used for the 2006 to 2015 Employer Tracking Surveys. However, the final 2015 and 2016 samples are 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
 - There has been a change since last year to the question relating to number of employees. In 2016 this included the owner (the person spoken to). In 2015, the question related to employees excluding the owner / person spoken to, hence this has been taken into account.
- A total of 100 telephone interviews were conducted with construction sector employers in Northern Ireland and 24 with stakeholders in Northern Ireland. The stakeholder element will be reported on separately to the employer results due to questionnaire differences.
- 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.

Research Background

- 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 2016 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 and 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.

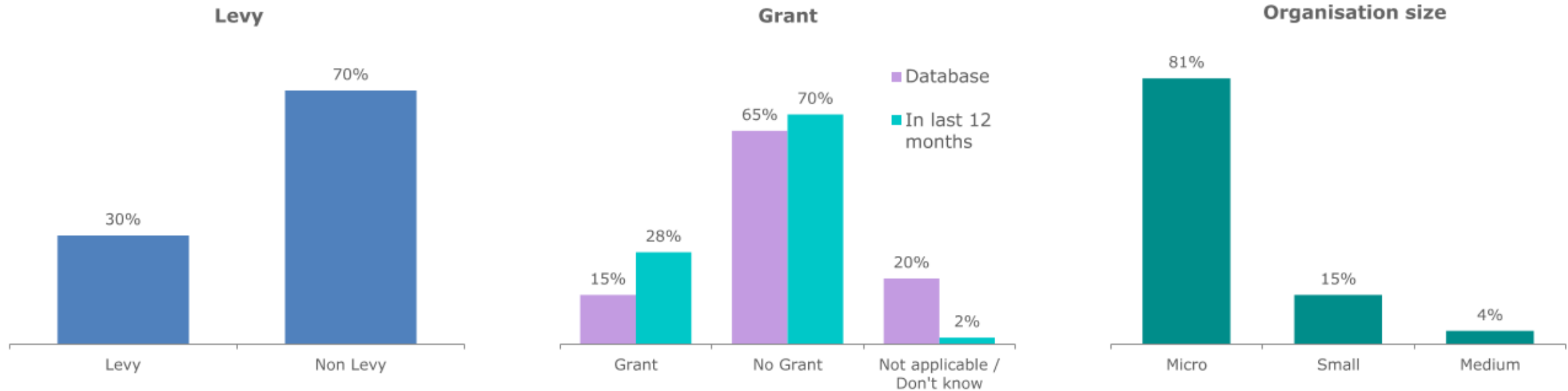
Part 1 – NI Employer Research



NI Employer Sample



The sample make up has representation from three of the four organisation sizes.

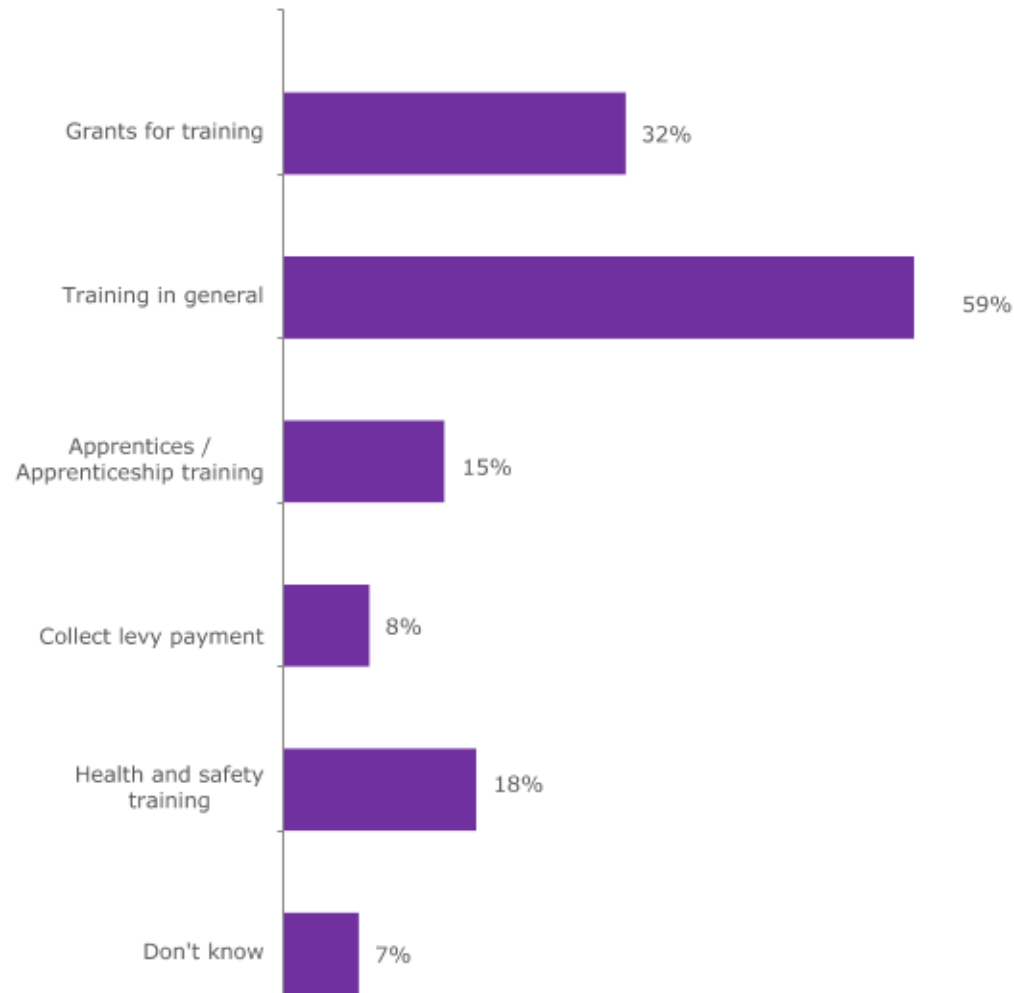


- Note that because the data held by CITB NI on employers differed in some instances to that given by employers when asked for the number of employees in their organisation, the data gathered during the questionnaire was used to determine organisation size.
- On average, across the full sample, businesses had 11.1 employees. For the medium businesses, the average was 120.3, for the small it was 20.7 and for the micro businesses the average was 3.9. Overall, 15% of businesses in the sample had just one employee and 32% had 2 to 3 employees.
- When comparing to 2015, there is a more visible spread across organisation sizes (91% micro and 9% small businesses in 2015), prior to 2015 there was a 60, 30, 10 split across businesses size for micro, small and large businesses respectively.
- The proportion of those having received a grant is comparable at 15% in 2016 and 16% in 2015.
- There has been a slight increase in the proportion of sample that pay the levy this year, it has risen from 25% in 2015 to 30% in 2016.

Awareness, Use and Satisfaction with Services

CITB NI is seen by the majority as a provider of training but only a third consider CITB NI as a provider of grants for training.

What types of services do you think CITB provide?



- Employers were asked what types of services they think CITB NI provides. The most common response, cited by the majority of the sample, was training (59%).
- This is in line with previous years, when training was also the most commonly cited service provided by CITB NI. It was cited by a similar proportion of employers (66%, 58% and 57% in the past 3 years respectively).
- A third recognise CITB NI as a provider of grants for training (32%). This is a slight (but insignificant) increase on previous years.
- There are also increases in the proportions citing apprentices or apprenticeship training (15%). Previously apprentices were cited by 5% of the sample.
- Interestingly, those citing apprentices were all micro businesses. Overall there were two services which a greater proportion of micro businesses cited than small and medium businesses, these were apprentices/apprenticeship training (19%) and Health and Safety training (21%).
- 80% of levy payers cited training.

Note: Responses cited by more than 2 employers only

2016 Employers = 100

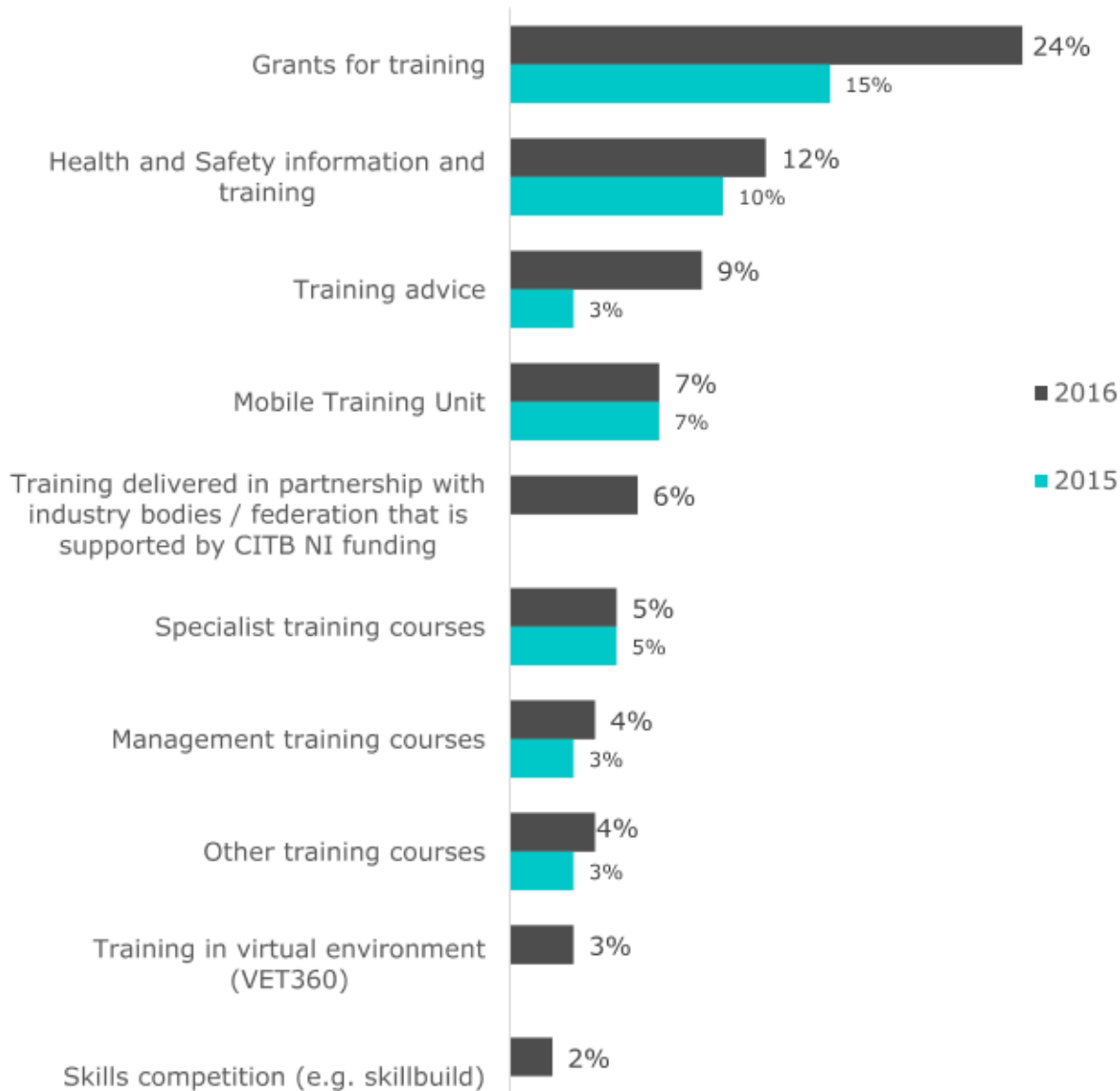
CITB NI remains to be primarily associated with services related to training.

Prompted awareness of services (including don't knows)	2016	2015	2014	2013	2012	2011
Base: all employers (c. 100 each year)	%	%	%	%	%	%
Grants for training	93	92	98	93	96	98
Health & Safety information and training	89	90	97	91	92	94
Specialist training courses	83	76	94	61	72	64
Management training courses	82	72	74	79	80	81
Training advice	80	71	62	87	85	90
Other training courses	79	80	80	56	69	57
Mobile training unit	74	73	90	86	88	87
Provision of publications	62	52	77	70	71	80
Conducting research into industry training needs (Previously Conducting research and providing Labour Market Information (LMI))	61	40	50	39	43	39
Standards and qualifications development	61	59	61	55	61	64
Promotion of careers in construction (Previously Careers information and advice)	60	42	59	52	60	51
Skills competitions (e.g. SkillBuild)	50	65	71	56	63	n/a
Training in partnership with industry bodies and federations	48	60	85	69	n/a	n/a
Employer engagement events	40	65	77	n/a	n/a	n/a
Projects funded by external sources	36	34	50	36	n/a	n/a
Training in virtual environment (VET360)	35	n/a	n/a	n/a	n/a	n/a

- As well as testing unprompted awareness, to understand levels of prompted awareness employers were read a list of CITB NI's current services and asked which they were aware of.
- Average awareness of services for 2016 was 65%. (69% in 2015). This average has been calculated based on those that answered (excludes don't knows).
- Nearly all employers were aware that CITB NI provide grants for training (93%) and Health and Safety information and training (89%).
- Largely prompted awareness is in line with previous years. There was slight reduction in awareness of training in partnership with industry bodies and federations (48%) and employer engagement events (40%).
- The services for which there is least awareness are:
 - Training in virtual environment (VET360) (35%). This is a new service added to the questionnaire for 2016 so could be an area for CITB NI to promote more among employers for 2017.
 - Projects funded by external sources (36%). This is in line with previous years.
 - Employer engagement events (40%). This was the biggest reduction seen in awareness when comparing to previous years (65% in 2015 and 77% in 2014). This could be due to a lack of employer events in the 12 months preceding the 2016 survey or a reduction in advertising of such events. Therefore, this is a recommended follow up on this piece of research.
- CITB NI remains to be primarily associated with services relating to training, such as providing grants for training, health and safety information and training and specialist training courses.

Over three quarters of micro businesses had not used any of CITB NI's services.

Use of CITB NI's services

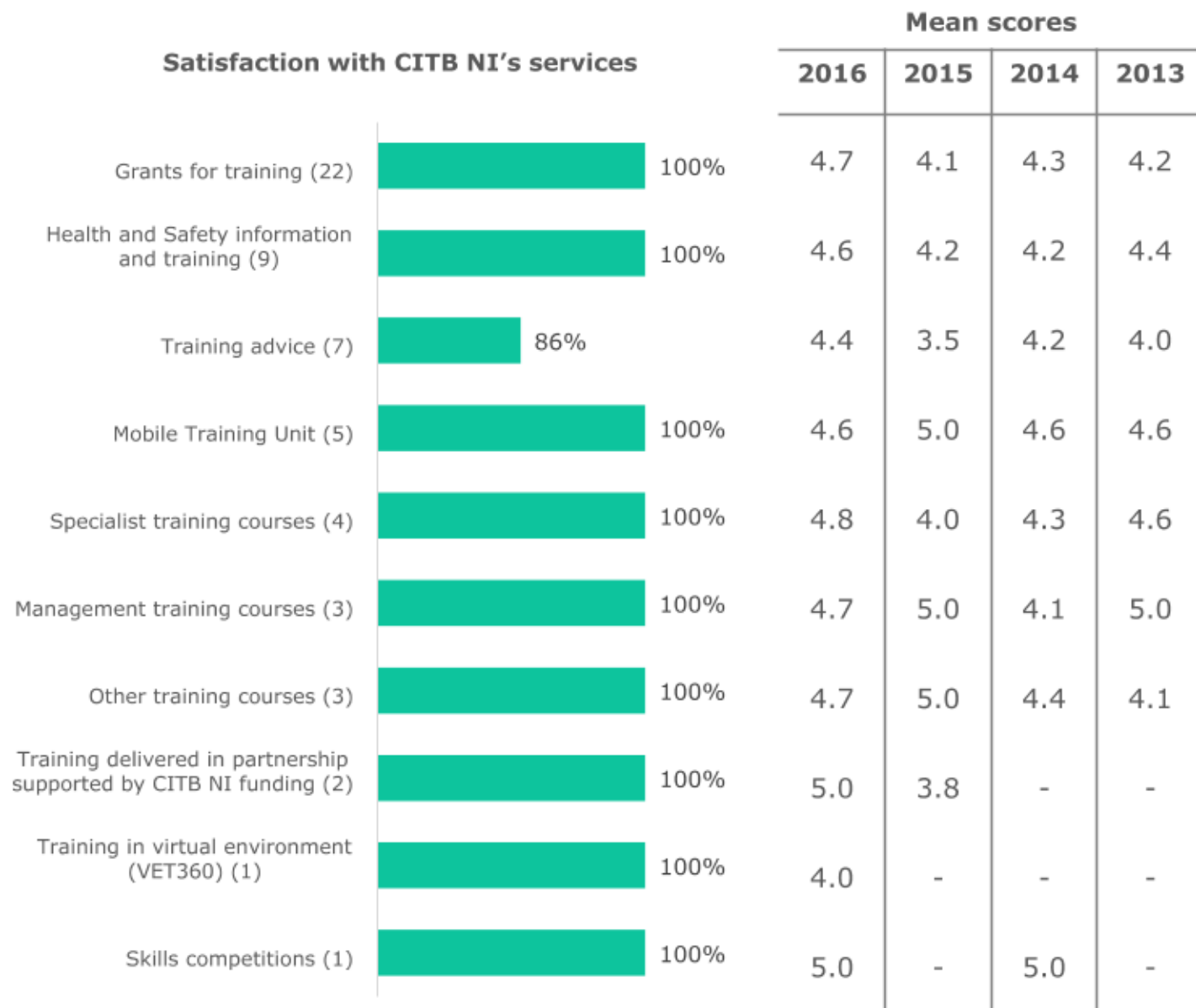


- Employers were asked which of CITB NI's services they had used in the past 12 months.
- The most commonly used services were grants for training (24%), Health and Safety information and training (12%) and training advice (9%). These have historically been the top three most commonly used services.
- Results are largely in line with findings from the 2015 survey, although there was an increase in the proportion of employers that had had a grant for training in 2016 (24% compared to 15% in 2015).
- On average micro businesses had used 0.44 services, small businesses had used 1 and medium businesses had used 2.25 of the services listed. Therefore, there is a clear distinction between organisation size and engagement with CITB NI through the use of products and services.
- Just over three quarters of micro businesses had not used any services offered by CITB NI in the last 12 months (79%). This supports the claim made above regarding comparisons to pre-2015 surveys in the introduction.

Note: Services used by at least one employer in 2016 only

2016 Employers = 100

Where services are used, satisfaction with them is very high.



- Service users were asked how satisfied they were with each service on a scale of 1 (very dissatisfied) to 5 (very satisfied). In the chart scores of 4 and 5 have been combined to give overall satisfaction levels.
- Mean scores are shown along side the chart, including means for previous years. The number of respondents is shown in brackets after the service on the chart. Note low base sizes, which will cause large fluctuations in average responses year on year.
- Satisfaction was at 100% across all services except training advice where one employer gave an ambivalent rating. This service has previously been among the lowest rated services therefore, should be an area of investigation for CITB NI.
- The findings are very positive, particularly those where a larger number of employers had used the service such as grants and Health and Safety training. Overall, the findings are more positive than those seen previously.
- In all instances except training in virtual environment (VET360), more employers rated that they were 'very satisfied' rather than just 'satisfied' with the service.

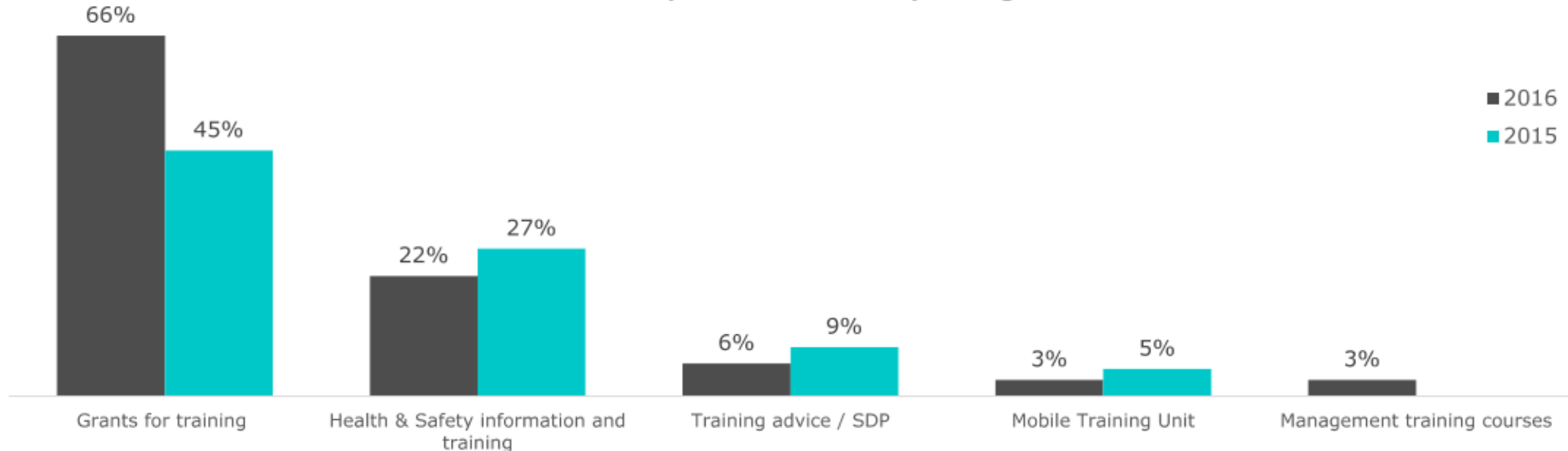
Importance of services is rated highly across the board.

Perceived importance of CITB NI's products and services					
Base: all employers using each service	Base	2016	2015	2014	2013
	('16,'15,'14,'13)				
Training delivered in partnership supported by CITB NI funding	(2,0,4,0)	5.0	4.0	-	-
Training in virtual environment (VET360)	(1,0,0,0)	5.0	-	-	-
Skills competitions (e.g. Skillbuild)	(1,0,0,0)	5.0	-	-	-
Other training courses	(3,3,15,15)	4.7	4.7	4.2	3.7
Management training courses	(3,2,11,8)	4.7	4.0	4.2	4.4
Training advice / SDP	(7,2,22,23)	4.6	4.5	4.5	3.7
Grants for training	(22,14,52,53)	4.6	4.1	4.6	4.5
Specialist training courses	(4,4,18,9)	4.5	4.5	4.7	4.4
Mobile Training Unit	(5,5,20,21)	4.4	4.2	4.7	4.1
Health & Safety information and training	(10,9,42,53)	4.2	4.3	4.7	4.3
Delivery of projects with external funding	(0,2,0,0)	-	3.0	-	-
Employer engagement events covering CITB NI products / services	(0,2,0,0)	-	3.0	-	-
Standards and qualifications development	(0,0,7,7)	-	-	4.1	4.4
Provision of publications	(0,0,19,19)	-	-	4.1	3.7
Promotion of careers in construction (previously Careers information, advice and guidance)	(0,0,13,15)	-	-	4.5	3.3
Conducting research into industry training needs (previously Conducting research and providing LMI)	(0,0,50,41)	-	-	3.9	3.1

Grants for training remains the most important service overall.

- The previous slide shows ratings of importance of products and services from employers that had used them. On average, all are rated as important. The product with the lowest mean score was Health and Safety training because one user felt it was 'fairly unimportant' for their company, indicating they just undertook the training as a requirement. No other products or services received a rating of unimportant.
- Grants for training has been the most important service for the past 3 years and remains the most important service to employers in the construction industry for 2016 (66%). All four medium businesses within the sample cited grants for training as the most important service.
- Among those that had not claimed a grant in the past 12 months, 22% felt that training advice was the most important service.
- 88% of levy payers cited grants as the most important service, indicating a strong feeling among employers of getting something back from what they are paying into.
- Among non levy payers, 40% felt that Health and Safety information and training was the most important service.

Which is the most important service for your organisation?

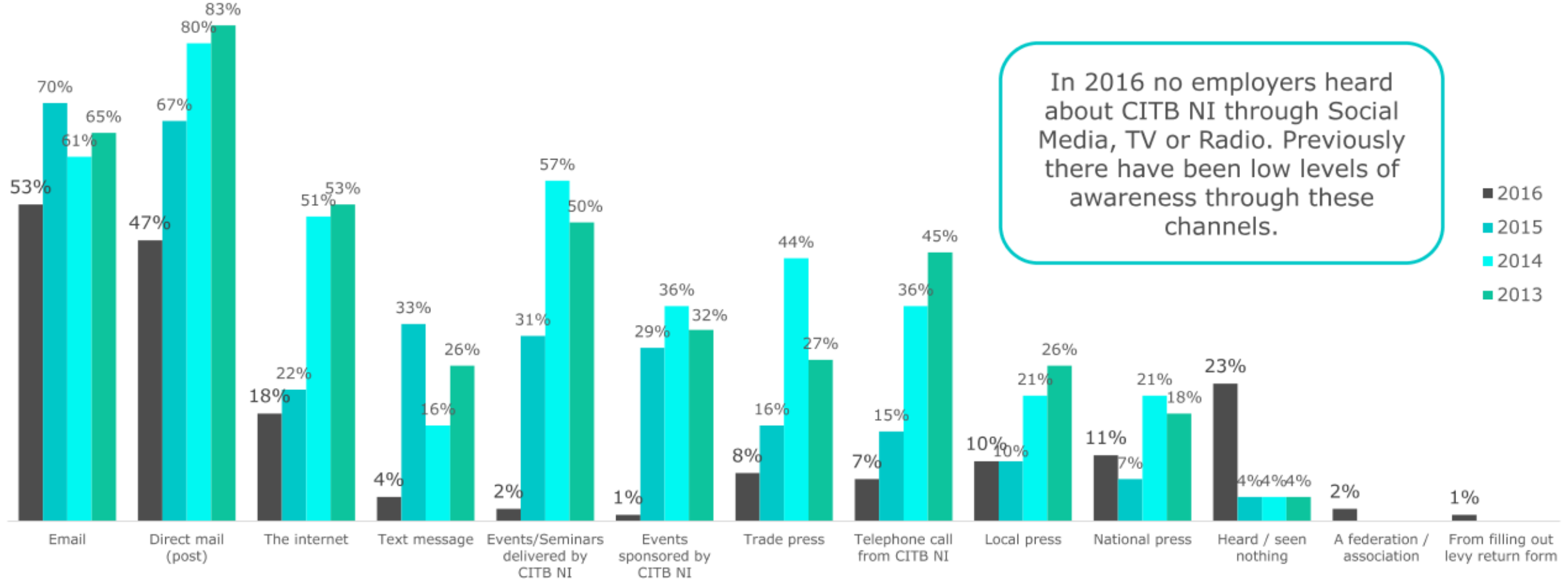


Communications

There has been a decline in communication recall generally in 2016 and an associated uplift in those who could not recall.

Email and post are the communication routes through which employers are most likely to have heard about CITB NI.

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



In 2016 no employers heard about CITB NI through Social Media, TV or Radio. Previously there have been low levels of awareness through these channels.

■ 2016
■ 2015
■ 2014
■ 2013

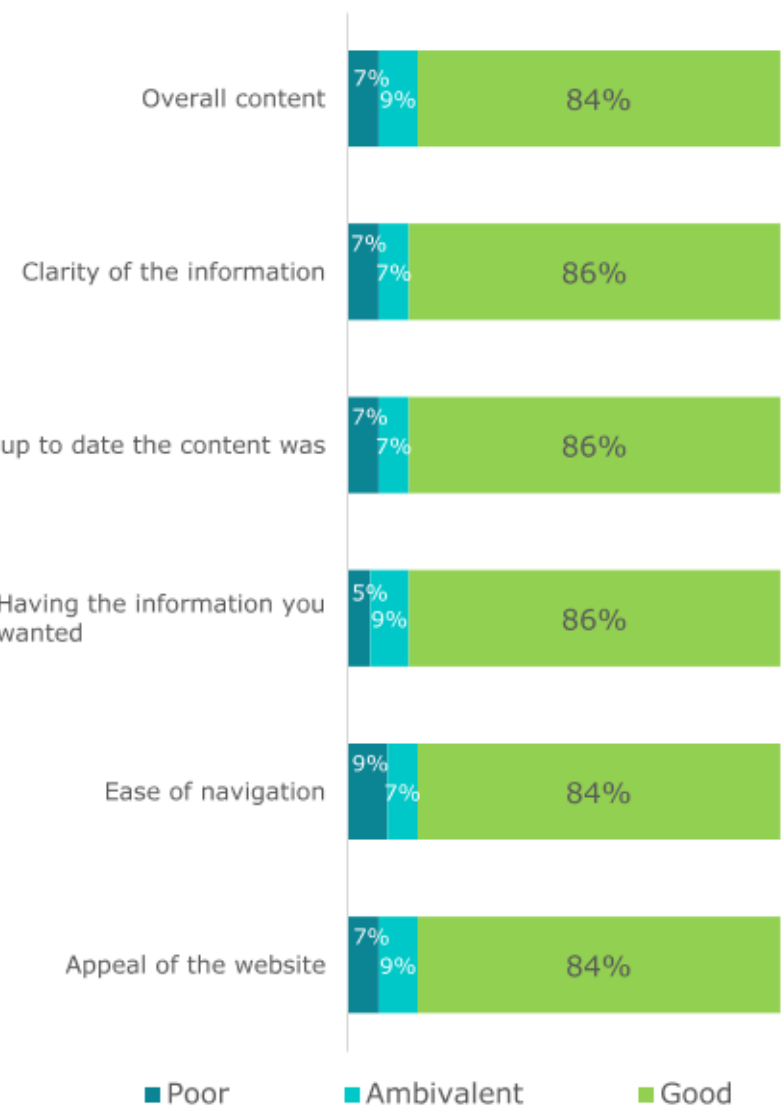
Note: Communication methods cited by at least one employer in 2016
2016 Employers = 100

Nearly a quarter of employers had not heard from CITB NI in the 12 months prior to the survey.

- Employers are most likely to hear about CITB NI through email (53%) or post (47%). For a second year in a row, email has become the most common route through which employers have heard about CITB NI. There has been a year on year decline in the proportion of employers hearing about CITB NI through direct mail but 2016 has seen the biggest reduction yet from 67% in 2015 to 47% in 2016.
- There has been a reduction in nearly all communication methods cited in 2016 and an increase of 19% in the proportion of employers citing that they have not heard about CITB NI through any form of communication in the past 12 months (24%). This is a concerning finding and it is important to discover whether this is due to a reduction in the communication sent out by CITB NI or whether communication is not getting through to employers and if so the reasons why not. If it is not due to a reduction in the amount of communication CITB NI are sending out, this could be linked to the sharp fall in direct mail communications. Therefore, to understand this, it would be worthwhile carrying out some research into the efficacy of individual communication methods so that CITB NI can weigh up the cost benefit of a more expensive postal route over emails.
- All of the medium businesses in the survey had received email communication from CITB NI in the past 12 months and three quarters had received direct mail. Equally, among small businesses, the proportion citing email rose to 67%, although direct mail remained the same as the sample average (47%).
- Previously there had been low levels of awareness of CITB NI through social media channels and TV or radio, however, in 2016 there were no reported cases of awareness through these channels.

Just under half of employers had visited the website in the past 6 months.

How would you rate the website in terms of...



Mean scores

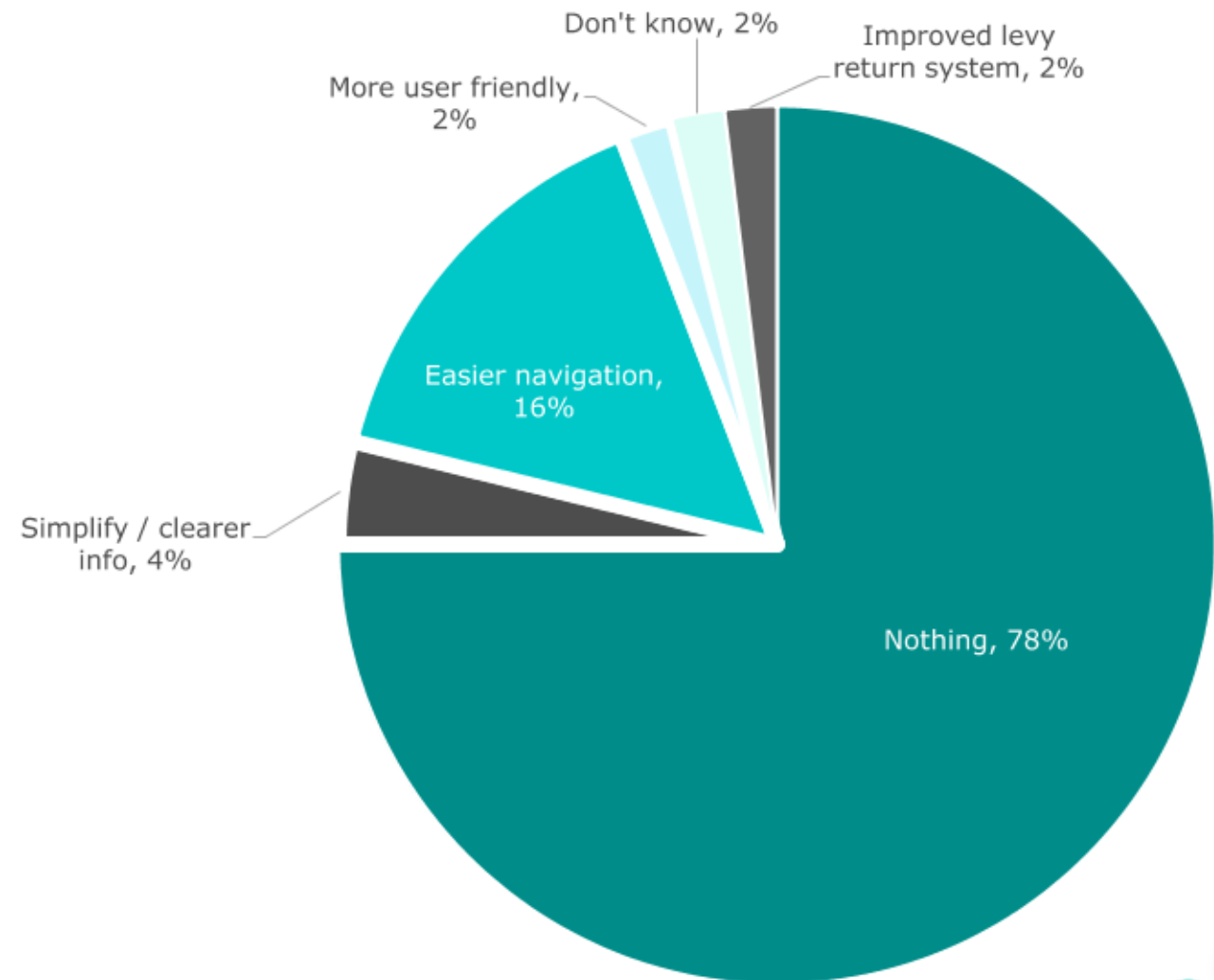
	2016	2015	2014	2013
Overall content	4.3	4.0	4.1	4.1
Clarity of the information	4.3	4.0	4.0	4.3
How up to date the content was	4.2	3.9	4.3	3.8
Having the information you wanted	4.2	3.9	4.0	4.2
Ease of navigation	4.2	3.9	3.9	4.0
Appeal of the website	4.2	3.7	3.7	3.8

- 46% had visited CITB NI's website in the past 6 months. This proportion rose to 100% among medium businesses and 79% among small businesses. Comparatively, just 38% of micro businesses had visited the website in the past 6 months.
- In 2015 just 22% of employers within the sample had visited CITB NI's website in the past 6 months. However, prior to this the proportion was closer to the 2016 percentage at 57% in 2014.
- 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 previous years.
- All aspects of the website score very similarly and overall the results are positive because they are the best all round results seen to date.
- Of the three employers that rated the website poor overall, the reasons were:
 - Difficult to navigate / poor layout (3 employers)
 - Overcomplicated / too much information (1 employer)

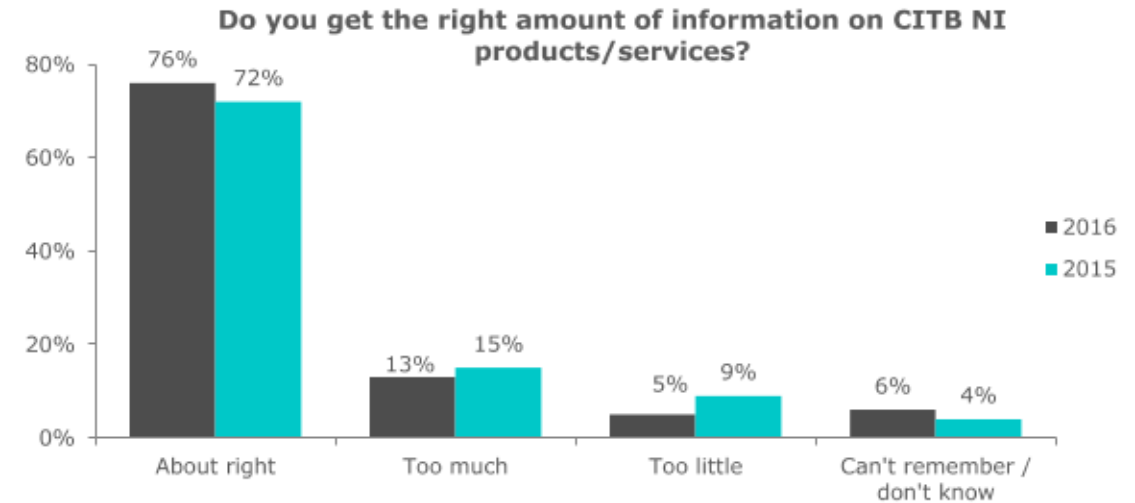
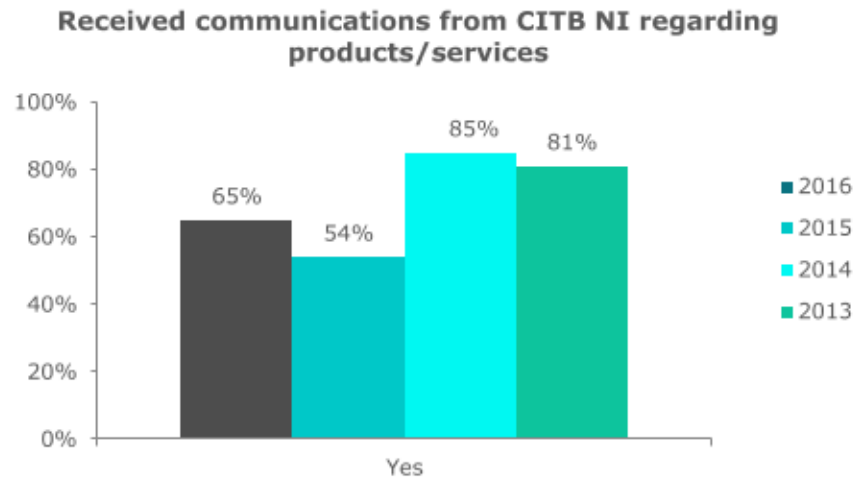
The majority of employers could not think of any improvements to be made to the website.

- The majority of employers could not think of any improvements to be made to the website (78%).
- Of those that could think of an improvement, the most commonly cited was easier navigation (16%).
- Navigation was also the main reason for dissatisfaction with the website overall. Therefore, a focus for CITB NI should be on making the website easier to navigate.
- Other improvements cited by 1 or 2 employers were:
 - Simplify / clearer information (4%)
 - More user friendly (2%)
 - Improved levy return system (2%)

What improvements, if any, would you like to see to the website?



Of those that received information on products and services, the majority felt it was about the right amount.

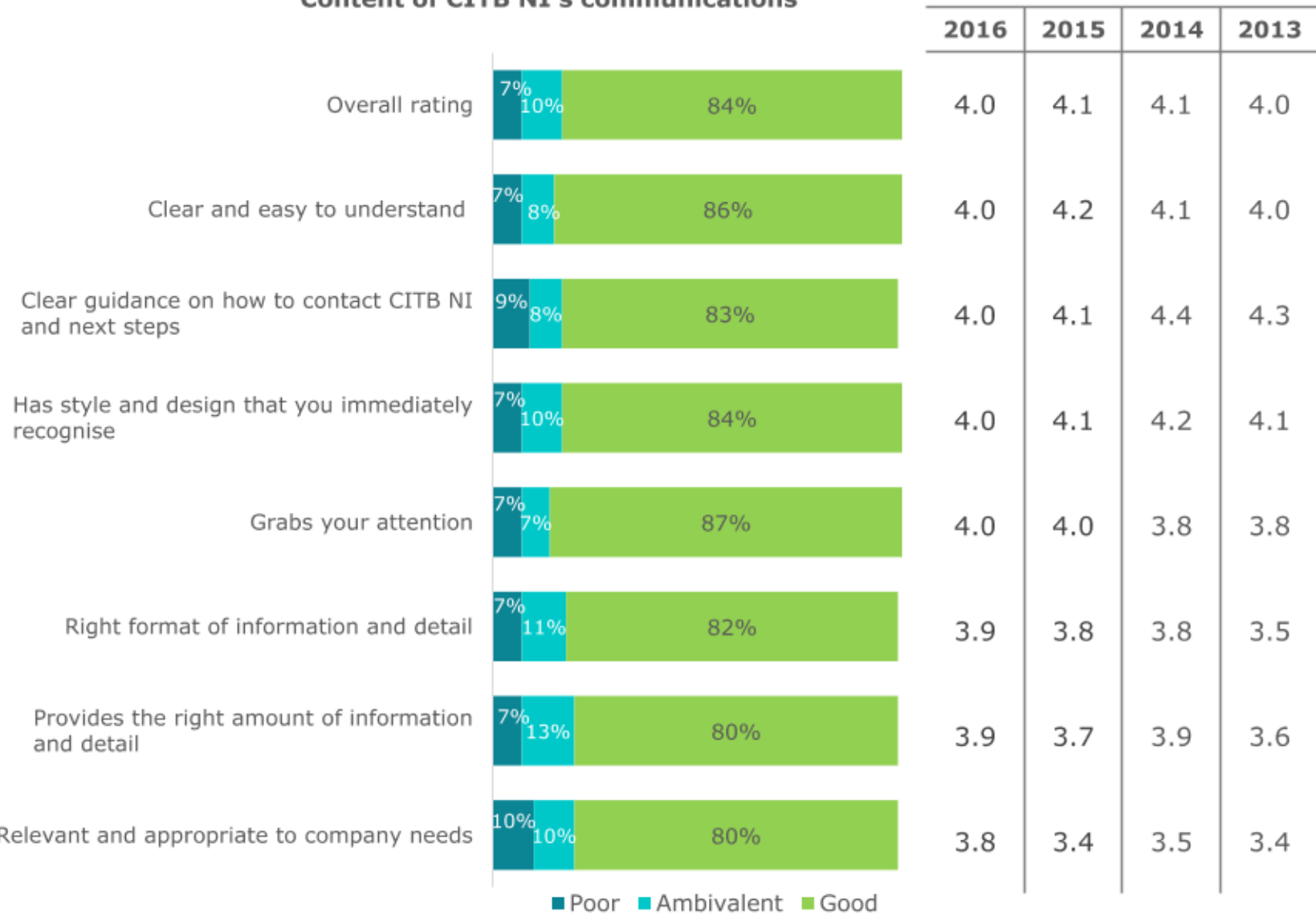


- Two thirds of employers have received communication from CITB NI in the past 12 months relating to products and services (65%). This is an increase on the proportion witnessed in 2015 (54%) but still less than in previous years where the sample make up was different.
- Interestingly, the percentage does not vary much between organisation sizes, with 50% of medium businesses, 71% of small and 69% of micro businesses recalling receipt of communication on products and services.
- Among those that have received communications on products and services, CITB NI have got the frequency right with which they communicate with employers. Three quarters felt they received the right amount of information from CITB NI on products and services, this is in line with previous years (76%).

Satisfaction with the communication and its content is very high.

Content of CITB NI's communications

Mean scores

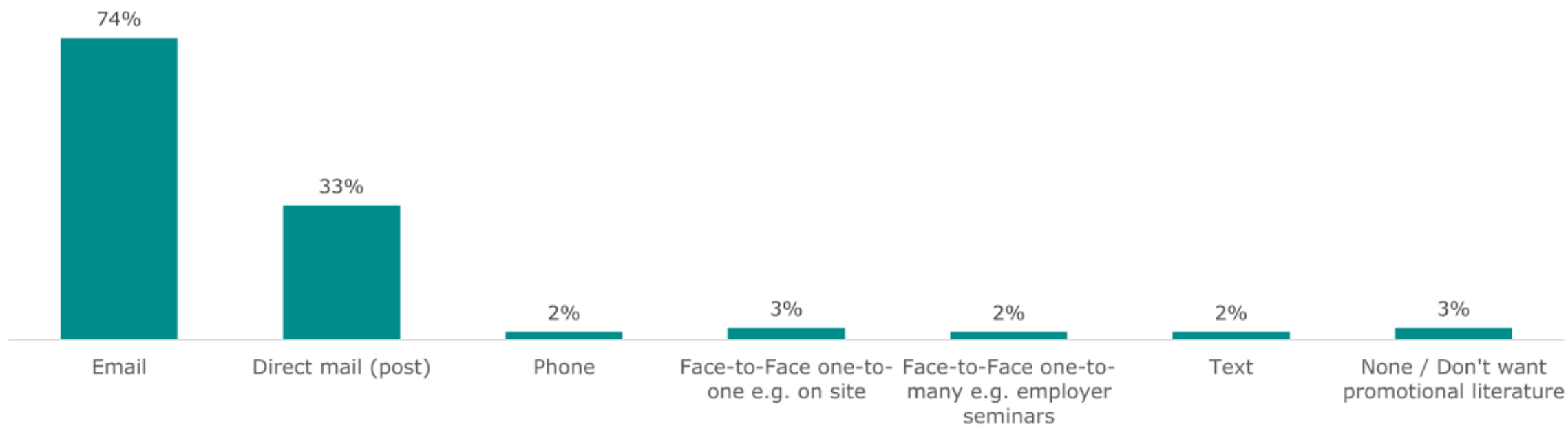


- The feedback on CITB NI's communications remains positive with the majority of the sample agreeing that communications are good across all areas measured.
- Being attention grabbing (87%) and clear and easy to understand (86%) were the two highest scoring aspects of CITB NI's correspondence. This is a very positive finding as it indicates that the communications are catching the eye of employers and encouraging them to read through the communication they receive.
- The area with the lowest rating is being relevant to and appropriate for employer's businesses (3.8). This has historically been the lowest rated aspect of communication and therefore indicates that CITB NI may have more of an impact with their communication if they were able to make it more tailored to individual business needs.
- So although employers understand and are drawn to the information they receive, they are less likely to be able to find it applicable to their own business.

■ Poor ■ Ambivalent ■ Good

There is a strong preference for email communications.

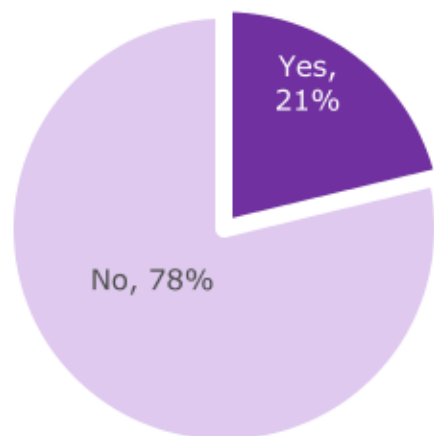
Preferred method for receiving information or communications from CITB NI



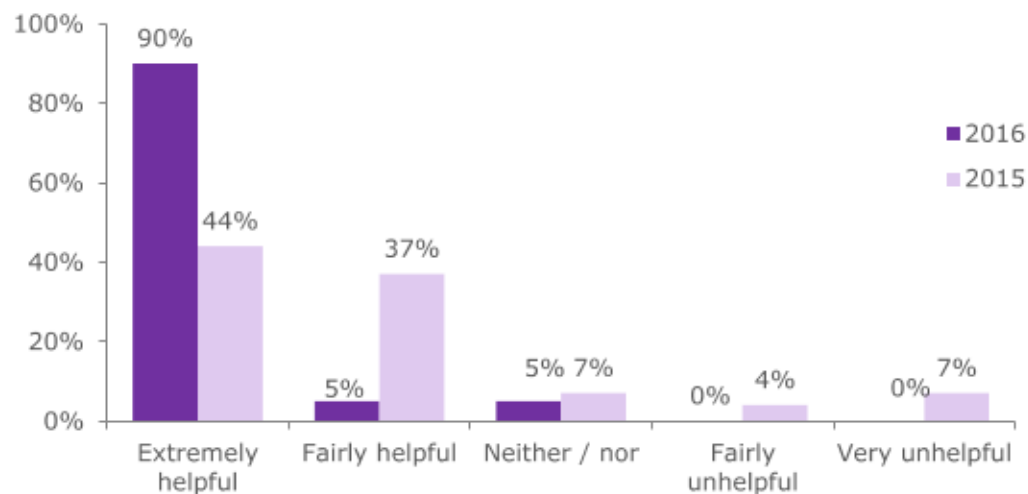
- The preferred method for receiving information or communications from CITB NI is predominantly email (74%). This is reflective of previous surveys.
- A third still prefer direct mail (33%), although this has fallen since last year from 44%.
- Among medium businesses, all would prefer to receive communications via email and among small businesses the proportion is 93%. However, among micro businesses, the preference for the use of post rises to 41%.
- All other methods are cited by very small proportions but include face to face, either one-to-one or one-to-many, phone and text.

For those that have made contact with CITB NI, the experience was very positive.

Have you contacted CITB NI's staff in the past 12 months?



How helpful was the response you got?



2016 Employers = 100

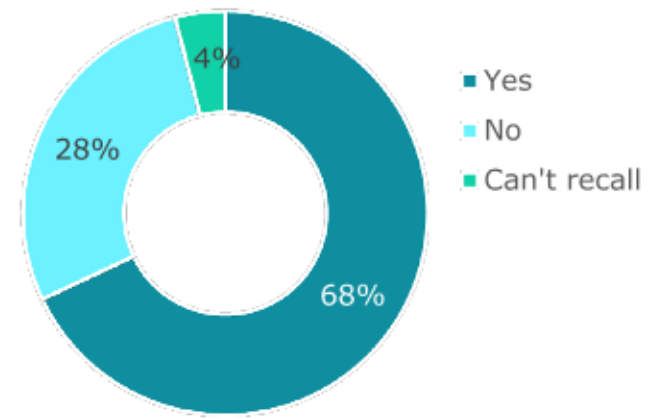
- 21% of employers had contacted CITB NI's staff in the past 12 months. This rose among medium businesses to three quarters (75%) and among small businesses to a half (53%). Two fifths of levy payers (40%) and two thirds of those that have received a grant at some point in the past (63%) had also contacted CITB NI in the past 12 months.
- The reason for contact was predominantly about a grant (48%). A quarter had made contact about the levy (24%) and 10% had made an enquiry related to apprentices. All other reasons were cited by single employers only but included: apprentice scheme, Card scheme and VAT release for travel expenses.
- There has been a sharp reduction in the proportion of employers contacting CITB NI about the levy since 2015 when it was the reason for contact in 41% of cases. The shift has been accounted for by an increase in contact regarding grants which has risen from 33% in 2015.
- Contact was made mainly via phone (62%) or email (29%). One employer used the website and another used a combination of phone and email.
- The response given to contact was overwhelmingly rated as extremely helpful (90%), which is very positive and a significant improvement on the results from 2015. Just 2 employers did not rate their response 'extremely helpful'. Their contact with CITB NI was related to grants and an apprentice.
- When asked how future contact could be improved, the only improvement mentioned was that 'things just need to be simpler' this was quoted in relation to contact made about a grant.

The majority recall receiving grant scheme information but the minority acted on it.

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

Received grant scheme information

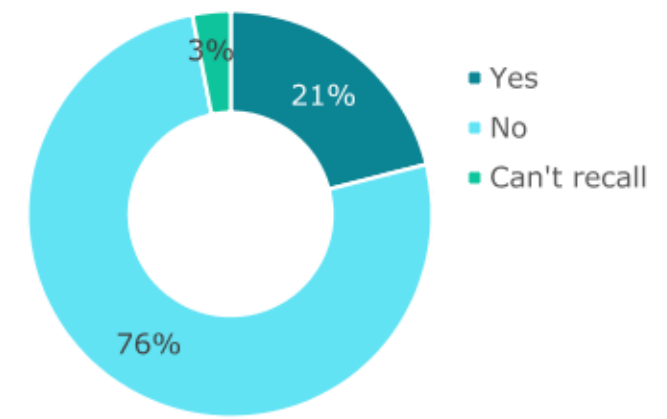
2016	2015	2014	2013
68%	64%	81%	69%



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

Acted on grant scheme information

2016	2015	2014	2013
21%	20%	47%	33%

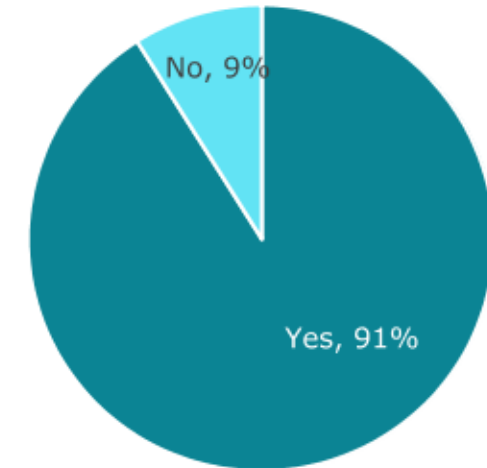


- The findings relating to receiving and acting on communication from CITB NI about the grant scheme in the past 12 months are very similar to those reported in 2015. Over two thirds could recall receiving information about the CITB NI grant scheme in the past 12 months (68%). As has been the trend throughout this report, all of the medium businesses could recall receiving grant scheme information and three quarters of small businesses could (73%). Among micro businesses the proportion held at two thirds (65%).
- Of those that had received information on the grants scheme, a fifth were encouraged to contact CITB NI to find out more (21%). This finding is in line with 2015 but still a reduction on levels seen prior to this (again this may be a consequence of the sample changes). This could be an indication that the information provided is not seen as relevant enough to employers for them to act on it.
- Levy payers were twice as likely as non levy payers to contact CITB NI about the grant scheme information received (32% compared to 16%).
- The difference is most significant when looking at organisation size, among medium and small businesses the proportions making contact following receipt of information was 50% and 44% respectively, whereas among micro businesses the proportion fell to just 15%.
- Of the 14 employers in the sample that contacted CITB NI about the grant scheme, 71% went on to claim a grant as a result. This was 100% of the medium businesses, 75% of the small businesses and 63% of the micro businesses that had made contact. Of the levy payers that had made contact 100% claimed a grant as a result but among the non levy payers the proportion was much lower at 43%.

Nearly all employers are aware they must submit a levy return by 31st August.

- Among the four employers that contacted CITB NI about the grant scheme but did not end up claiming a grant for training the reasons were:
 - Applied too late
 - Too busy to let people go for training
 - Did not think we were eligible
 - Too time consuming
- When asked what would encourage them to make a claim, a variety of responses were given by the four employers:
 - If making a grant claim was easier (75%)
 - If grants were available for a wider range of training activities (50%)
 - If grants for training were higher (50%)
 - If I could get help making a claim (50%)
 - If it involved less paperwork (25%)
 - If we had more staff (25%)
- 91% of employers in the sample were aware that in order to claim a grant they had to submit a levy return by the 31st August each year.

Are you aware to claim a grant you must submit a levy return by 31st August?



Overall opinions of CITB NI

Satisfaction is high across the board.

Satisfaction with CITB NI

Mean scores

	2016	2015
Facilitating delivery of training to the sector	4.1	3.9
Providing the highest quality of support, service, training and qualifications	3.9	3.9
Developing training solutions for the industry's future training needs	3.9	3.8
Working in partnership with the industry	3.9	3.7
Signposting the industry to where and how training needs can be met	3.9	3.7
Developing training provision in sectors where it is not available	4.0	3.7
Identifying sources of income other than the levy	3.7	3.5

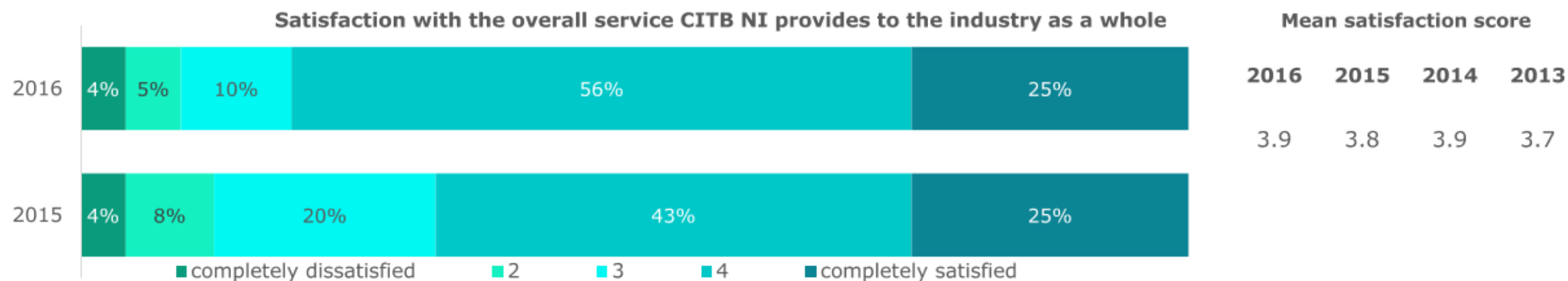
■ Unsatisfied ■ Ambivalent ■ Satisfied

- 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.
- The comparison of mean scores is shown on the right hand side. Data on these areas of satisfaction was not collected prior to 2015.
- The responses are more positive than last year across the board.
- Satisfaction with CITB NI's performance in all but one area is above 80%.
- The area with the highest level of satisfaction is providing the highest quality of support, service, training and qualifications (87%). However, this area does not have the highest mean score because just 18% of employers are 'completely satisfied' and 69% 'fairly satisfied'. This is the lowest level of complete satisfaction except for identifying sources of income other than the levy (16%).
- Therefore, although employers are satisfied with current performance in providing the highest quality of support, service, training and qualifications, there are definitely improvements that could be made. CITB NI may benefit from investigating this area further to understand what needs to be done to gain complete satisfaction in this area.

Note there were particularly high levels of NA and Don't know for these questions which have been excluded as per the rest of this report.

2016 Employers = 100.

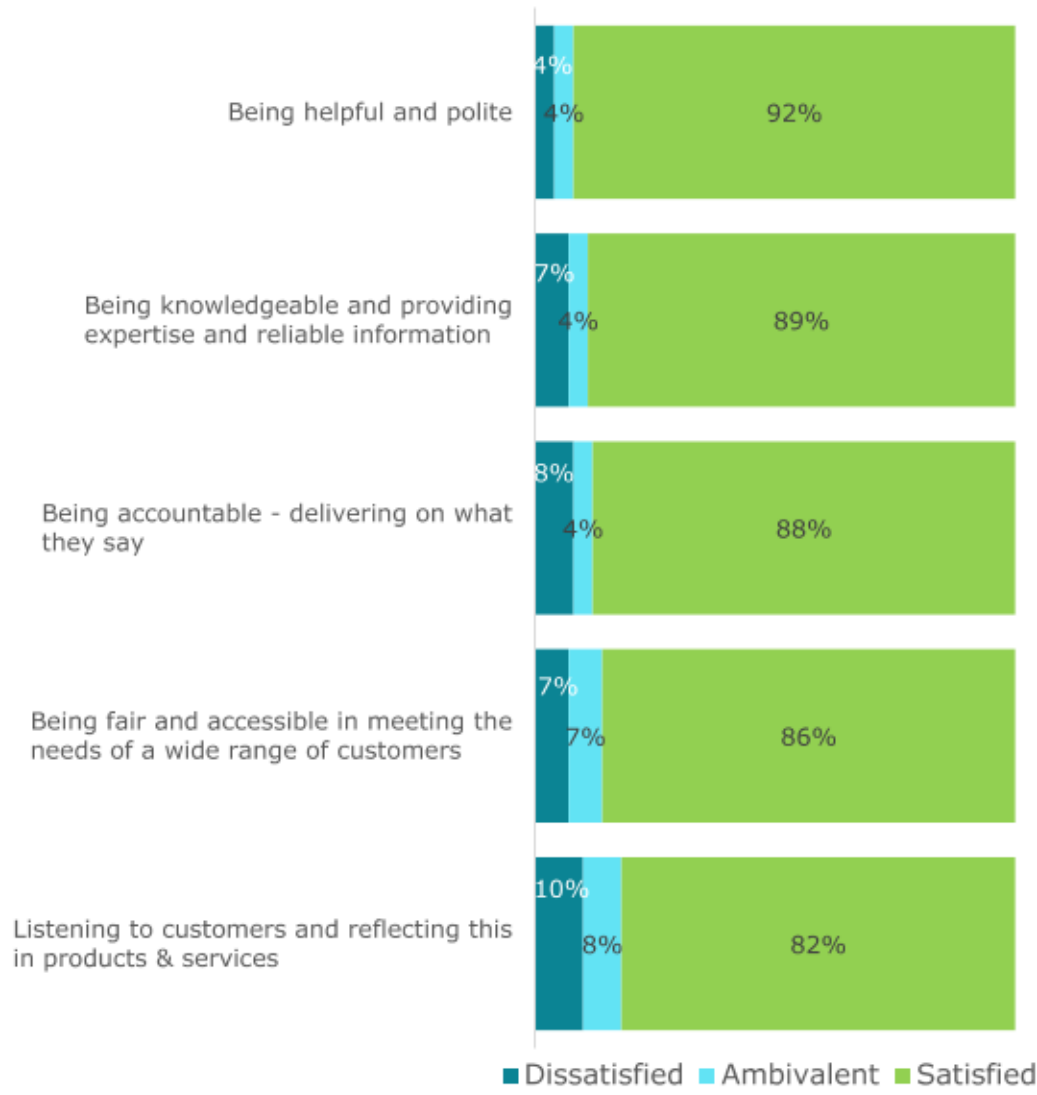
Levels of satisfaction with the service provided to the industry as a whole are the joint highest seen to date.



- Levels of satisfaction with the overall service CITB NI provides to the industry as a whole are very positive and the joint highest seen to date. 81% of employers are satisfied with CITB NI's overall service to the industry.
- All four medium businesses in the survey are 'fairly satisfied'. Among small businesses, 64% are 'fairly satisfied' and 21% are 'completely satisfied'. Among micro businesses, there is the highest proportion of complete satisfaction at 27%, although 51% are 'fairly satisfied' so overall satisfaction is lower at 78%.
- In a reversal to what was reported last year, levy payers have a higher overall satisfaction than non levy payers at 85% compared to 78%. 35% of levy payers are 'completely satisfied' with the overall service CITB NI provides to the industry. Comparatively, 20% of non levy payers are 'completely satisfied'. This is a positive finding as previously there has been a feeling of resentment among some levy payers towards CITB NI, which may be starting to decrease. Understanding the reason for this improvement may help to further decrease dissatisfaction among employers given the reasons reported below.
- Among the 7 employers that were dissatisfied 6 were micro businesses and 1 was a small business. Their reasons for dissatisfaction had a clear theme, the feeling that nothing is provided in return for the levy payment. Therefore, these employers may benefit from some clear, targeted information about how CITB NI can benefit them.
 - Nothing in return for the levy / It is just another bill (57%, 4 employers)
 - Not enough information provided (14%, 1 employer)
 - Was not told of levy return deadline (14%, 1 employer)
 - Too bureaucratic and waste of money (14%, 1 employer)

CITB NI are seen as being helpful and polite by nearly all employers that have interacted with them.

Satisfaction with CITB NI

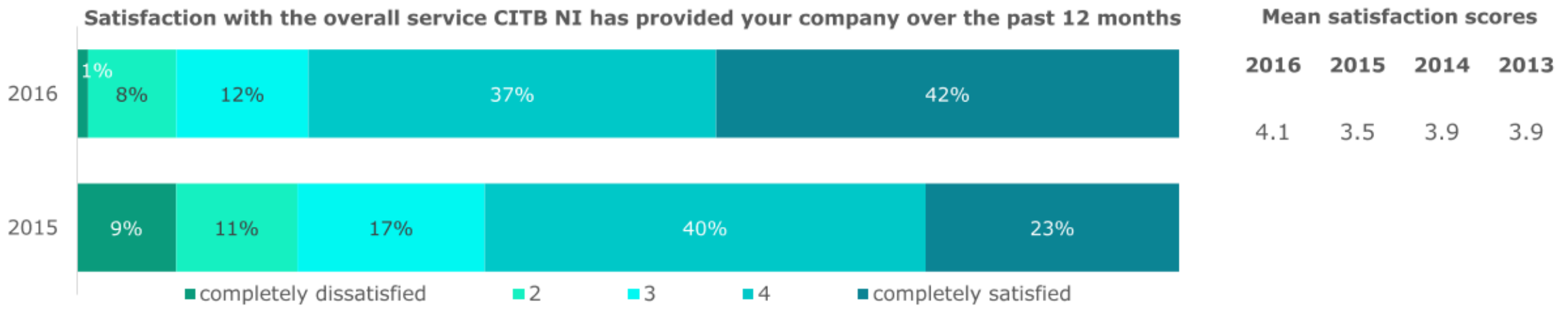


Mean scores

	2016	2015	2014	2013
Being helpful and polite	4.3	4.3	4.5	4.3
Being knowledgeable and providing expertise and reliable information	4.2	4.1	4.1	3.7
Being accountable - delivering on what they say	4.2	3.9	3.9	3.7
Being fair and accessible in meeting the needs of a wide range of customers	4.2	4.0	4.1	3.6
Listening to customers and reflecting this in products & services	4.1	3.9	3.9	3.6

- Employers were asked to rate satisfaction with their own interactions with CITB NI.
- Levels of satisfaction are again high across the board and an improvement on the 2015 data.
- CITB NI score highest in being polite and helpful. 47% are 'completely satisfied' and 44% are 'fairly satisfied'. This is in line with findings from previous years, where this has consistently been the top rated area of performance.
- At least 40% of employers that were able to rate each aspect were 'completely satisfied'. There is little difference between the 5 areas listed.
- The main area that falls slightly lower than the others in terms of satisfaction is listening to customers and reflecting this in products and services. Although 43% of employers are 'completely satisfied' in this area, there are 10% that are dissatisfied which is pulling down the overall average score. Therefore, this should be an area for focus for CITB NI to ensure that employers feel they can get what they need from CITB NI's products and services.

Levels of satisfaction with the overall service provided to individual companies is the highest noted to date.

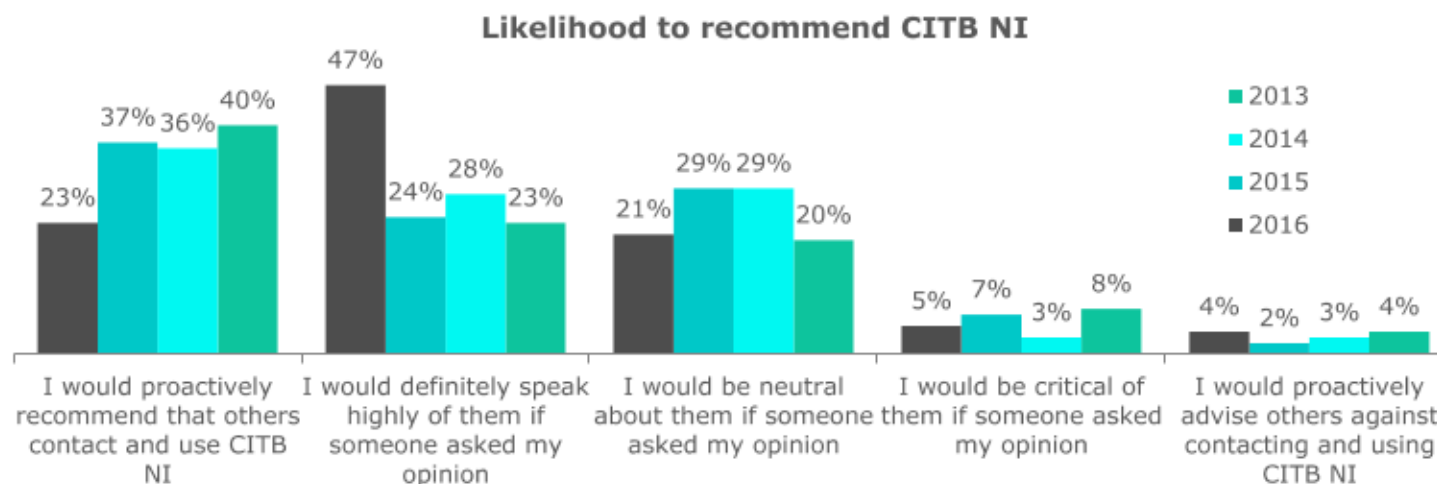


- 79% of employers are satisfied with the overall service CITB NI has provided to their company over the past 12 months. This is an increase of 17% on the proportion witnessed in 2015 (63%) and the highest mean score noted to date.
- Interestingly, more employers are 'completely satisfied' with the service CITB NI has provided for their company in the past 12 months (42%) than they are with the service CITB NI has provided the industry as a whole in the past 12 months (25%).
- The medium businesses in the sample were the most satisfied, one was 'fairly satisfied' and three were 'completely satisfied', producing a mean score of 4.8. Among the small businesses, 57% were 'completely satisfied' and 21% 'fairly satisfied', producing a mean score of 4.3. Finally, among the micro businesses, 37% were 'completely satisfied' and 42% were 'fairly satisfied', producing a mean score of 4.0.
- Encouragingly, 50% of levy payers were 'completely satisfied'. Comparatively, 38% of non levy payers were 'completely satisfied'. This returns to an earlier point that the levy payers are, on the whole, satisfied with the work of CITB NI and it is an increasingly small minority that are dissatisfied with what they can get in return for their levy payment.
- There were 7 employers that were not satisfied with the overall service CITB NI has provided for their company in the past 12 months. A variety of reasons were cited, those cited by more than one employer are listed below:
 - They take a levy but don't provide relevant service (57%, 4 employers)
 - Grant is too small or too hard to get (43%, 3 employers)
 - Their service is irrelevant to our industry (29%, 2 employers)

Although 70% of employers would be positive about CITB NI, there needs to be a positive movement towards proactive recommendation.

- 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.

- The proportion of employers that would proactively recommend CITB NI is just 23%, this is a significant drop on proportions witnessed in previously years. Countering this drop is a sharp increase in the proportion citing they would definitely speak highly of CITB NI if asked (47%).

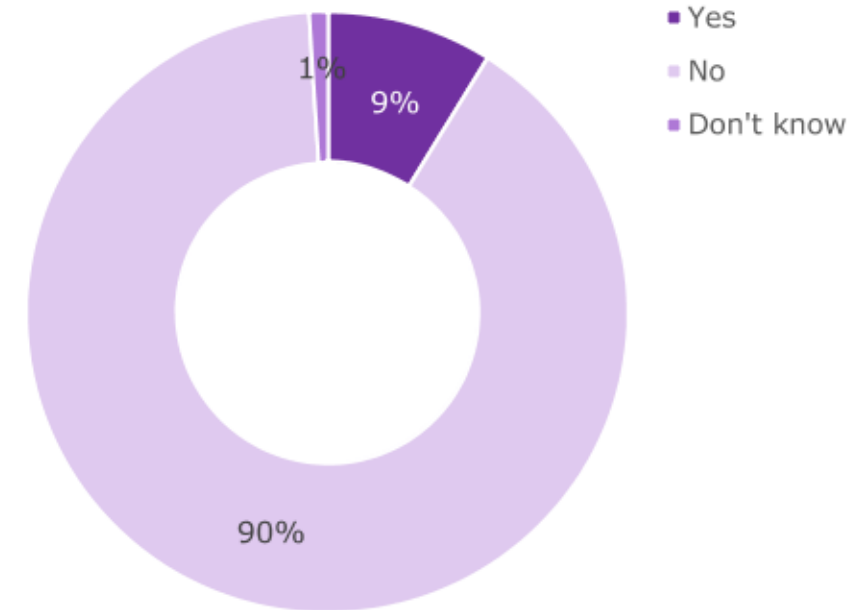


- The finding is positive in that there is a high proportion of employers that would speak highly of CITB NI (70%), however, given the importance often placed on word of mouth, it is important that employers are proactively recommending CITB NI.
- Looking at the subsamples, 50% of medium businesses would proactively recommend CITB NI, 14% of small and 23% of micro businesses would do so. There was no clear difference between levy and non levy payers. 38% of those that had claimed a grant in the past 12 months would proactively recommend CITB NI compared to 17% of those that have not.
- The net promoter score is the proportion that would proactively recommend and speak highly of CITB NI minus those that would be critical or actively recommend against usage. In 2016, this was 61%. This is an improvement on 2015 (53%).
- Among those that have received a grant in the past 12 months, the NPS score is very strong at 84%. Therefore this remains 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 focussed on the levy and the paperwork involved. 35% could not give a reason for their score citing 'don't know'. Of the employers that did give a reason, those cited by more than one employer were: pay levy but get nothing back (47%), too much bureaucracy / paperwork (47%), poor communication/don't get back to me (13%), grant scheme is too time consuming (13%) and don't have many dealings with them (13%).

Less than 10% of employers have actually recommended CITB NI to someone in the past 12 months.

- Although 23% of employers said that they would proactively recommend CITB NI, just 9% have actually done so in the past 12 months.
- This is a drop on the proportion reported last year. In 2015, 15% had recommended CITB NI in the 12 months prior to the survey.
- Micro businesses were the least likely to have recommended CITB NI, 6%. A quarter of the 4 medium businesses and 20% of small businesses had done so.
- Of employers that had received a grant in the last 12 months, 18% had recommended CITB NI compared to 6% of those not in receipt of a grant.
- Employers were asked what CITB NI could do to improve their service and relationship with them. 28% of employers cited don't know / no answer. More constructive responses cited by more than one employer included:
 - More frequent contact / information (11%)
 - More information on claiming grants (7%)
 - Information on available benefits (6%)
 - Reduce levy (4%)
 - Better access to grants (4%)
 - Provide clear information (4%)
- The responses have a clear theme of information. Employers appear to be aware that they do not know enough about CITB NI and its offering to be getting the most out of them. This should be another key area of focus of CITB NI, implementing the findings from this research to communicate efficiently and effectively with employers to raise their engagement with CITB NI.

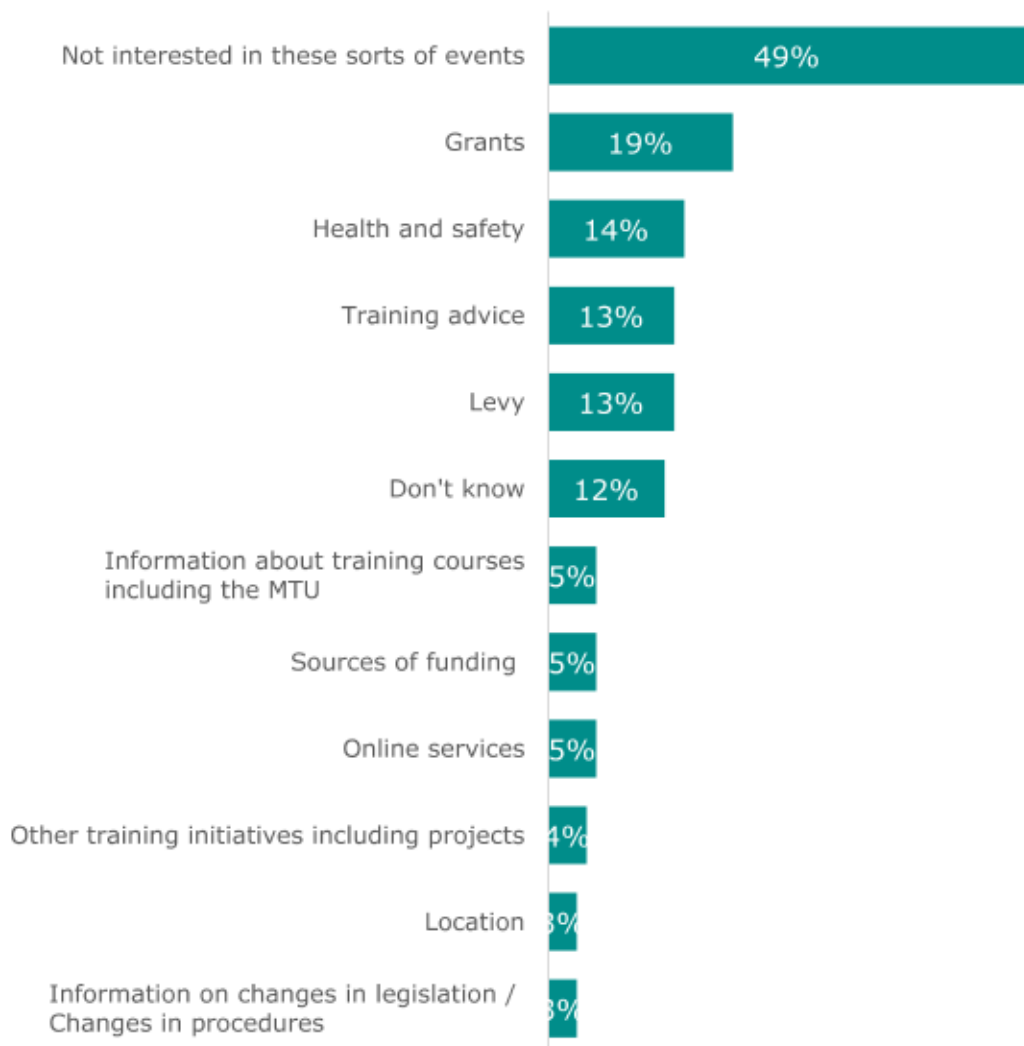
Have you recommended CITB NI to anyone in the past 12 months?



Employer engagement

Awareness of and attendance at engagement events are at the lowest levels recorded to date.

What topics would encourage you to attend employer events

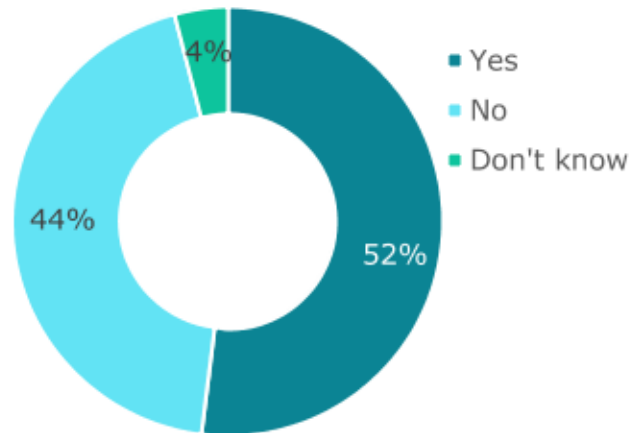


- 57% of employers were aware that CITB NI is running a series of employer events/business improvement seminars aimed at informing employers about its services including levy, grants and training. This is lower than levels of awareness in 2015 (70%) and 2014 (77%).
- 75% of medium businesses were aware of employer events, but among the small businesses awareness fell to 47%, lower than that of micro businesses at 58%.
- There was little differentiation between awareness of those in receipt of a grant in the past 12 months (61%) and those not (57%). Nor was there a difference in those that pay the levy (60%) vs those that do not (56%).
- Just 11% of the sample had actually attended one or more of the events. Again this is lower than previous years (39% in 2015).
- Attendance did rise slightly among levy payers (22%) and those in receipt of a grant (24%) compared to non levy payers (5%) and those not in receipt of a grant (5%).
- The results suggest that in 2016 there were either less events or the advertisement of them was less successful than it has been in previous years. This is an area that CITB NI should follow up on.
- When asked what topics would encourage them to attend such an event, employers were most likely to cite that they were not interested in such events (49%). Those not interested were spread across the three business sizes.
- Of those that could be encouraged, the main responses were: information on grants (19%), health and safety (14%), training advice (13%) and the levy (13%).

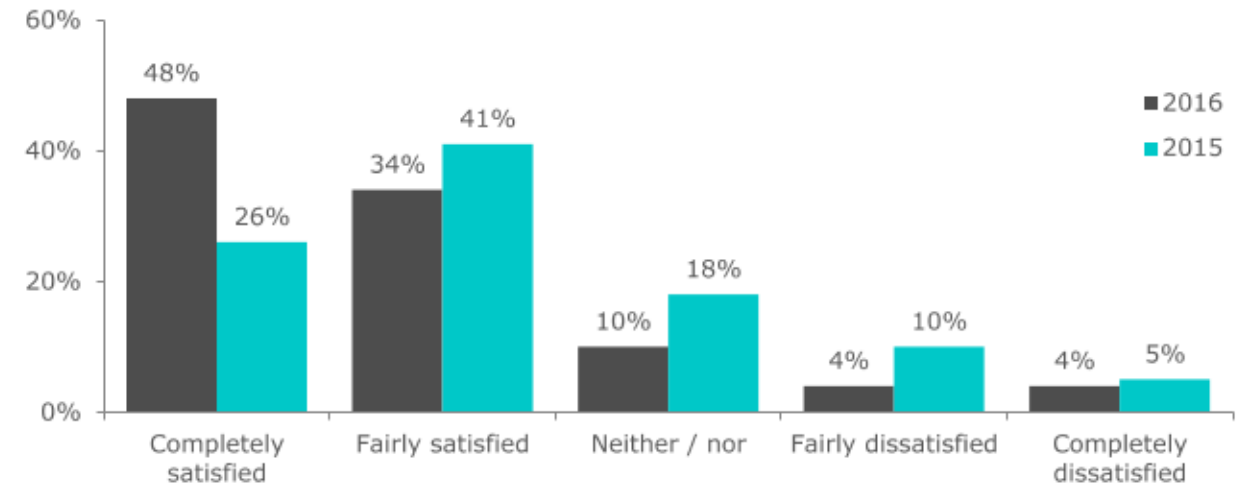
Support for the levy and grant system

Half of employers had used the online levy return facility and the majority were satisfied with it.

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

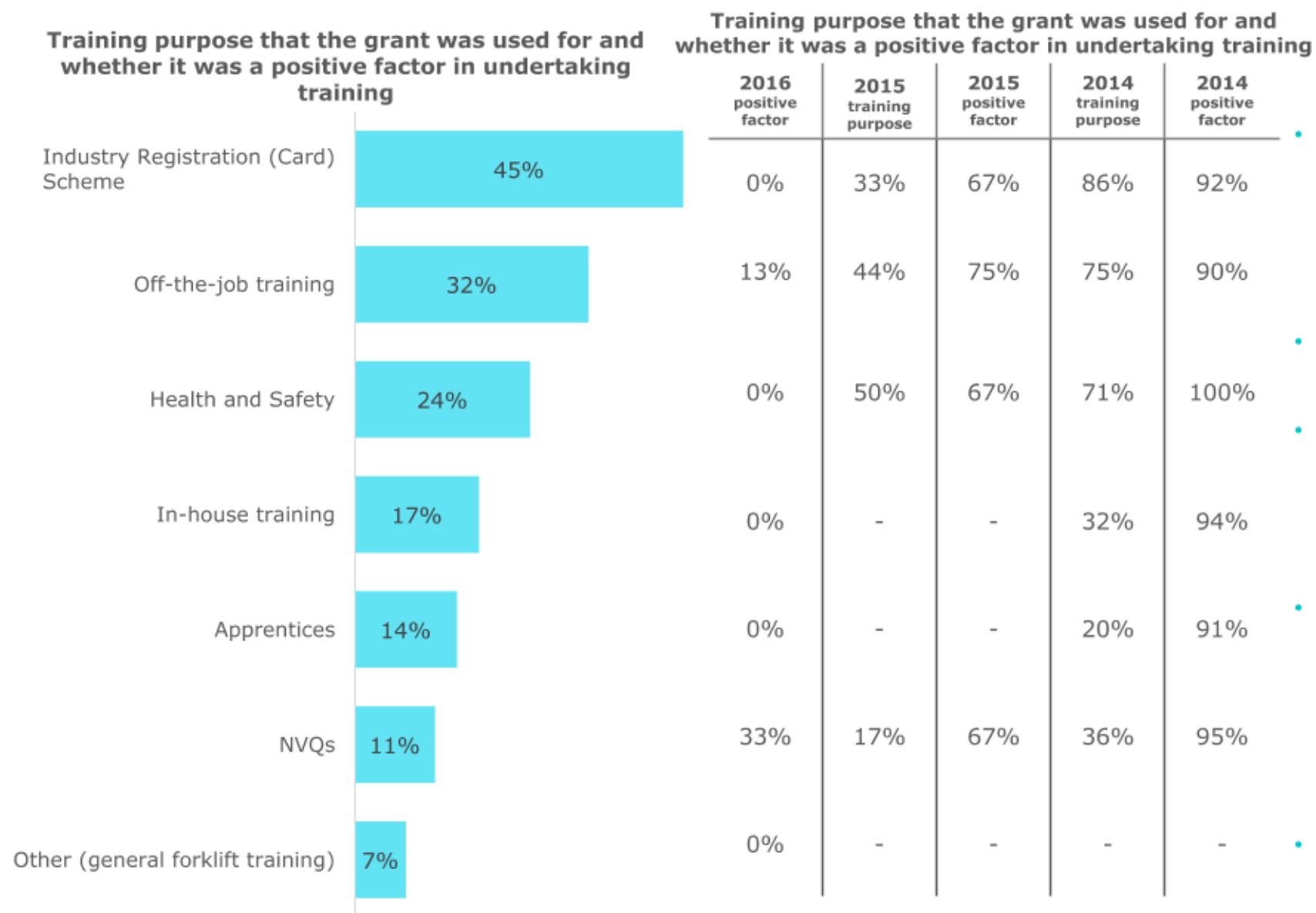


How satisfied have you been with this service?



- Half of employers have used CITB NI's online levy return facility (52%). This is an increase on 2015 when 39% of employers had done so.
- The proportion is much higher among small businesses at 80%. Just 2 of the 4 medium businesses in the sample had used the online levy return service (50%) and half of micro businesses had done so (49%).
- Two thirds of levy payers had used the online service (64%) compared to half of non levy payers (50%).
- Satisfaction with the online levy return service was high, 82% were satisfied overall and 48% were 'completely satisfied'. This is a clear improvement on the results from 2015.
- When asked if the guidance notes provided contained all the information required to help with completion of the annual return, 88% of employers agreed. Of the 12% (12 employers) that did not agree, 33% (4 employers) said they did not use the notes and 17% (2 employers) wanted more information about when it should be returned. Other responses were cited by single employers only but included: CITB NI irrelevant to us, notes need to be clearer, had to download the form/would rather receive in the post and need more information on who to include i.e. subcontractors.

Uses of the grant are similar to previous years, although the importance of the grant was lower than reported previously.



- The table shows what employers had used or claimed a grant for and the proportion that said 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).

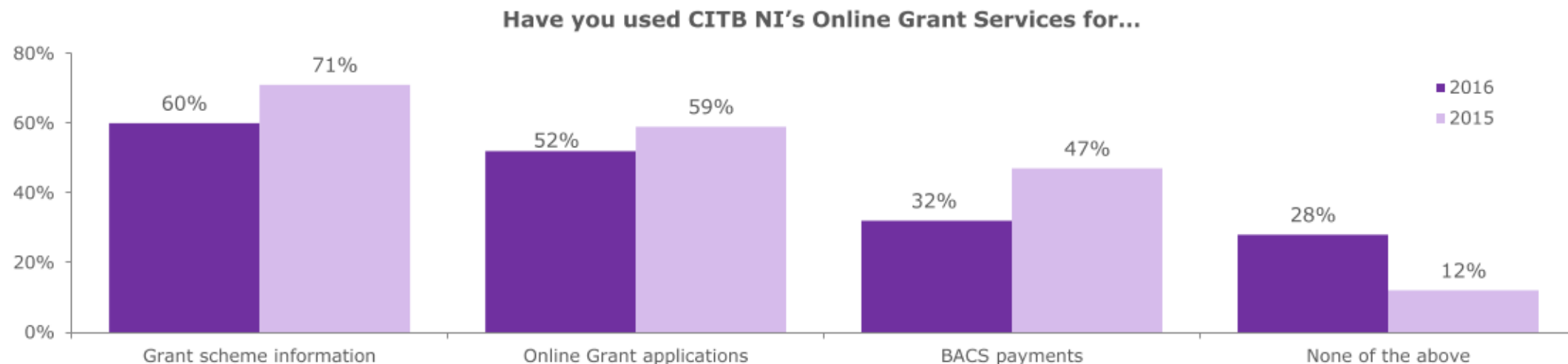
- The grant was most commonly used for the Industry Registration (Card) Scheme (45%).

- The main areas the grant was used for are similar to previous years, although the ordering by proportion has changed. Note there is high variation due to small sub sample size.

- Interestingly, the only areas where there was a proportion of employers that felt they may not have entered into the training if it were not for the grant were NVQs (33%) and off-the-job training (13%). These proportions are low when comparing to previous years.

- The fluctuations between years are due to the small subsamples involved.

Usage of CITB NI's Online Grant Services is lower than in 2015.



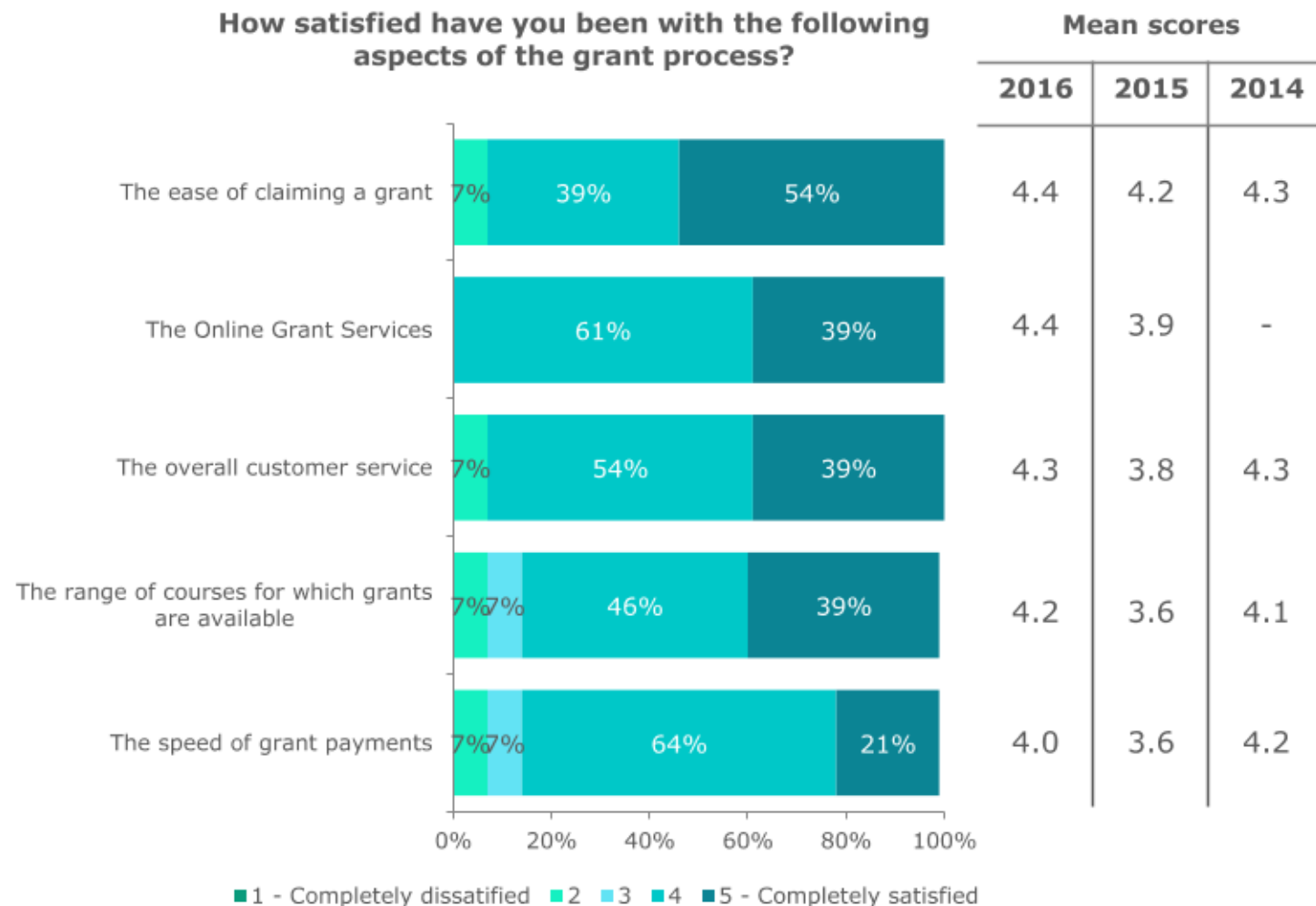
- Usage of CITB NI's online grants service was lower in 2016 than in 2015, 28% of employers in receipt of a grant had not used the online service in 2016, comparatively 12% had not used it in 2015.
- The most used aspect of the online service was grant scheme information (60%), as has been the case previously.
- Half of employers in receipt of a grant used the online service for online grant applications (52%) and a third used it for BACs payments (32%).
- All medium businesses in the sample had also received a grant in the 12 months prior to the survey and 75% had used each of the three services listed. 60% of small businesses had received a grant and of these 67% had used the online service for grant scheme information and online grant applications and 33% had used it for BACs payments. 19% of micro businesses had received a grant and of these 53% had used the online service for grant scheme information, 40% had used online grant applications and 20% had used BACs payments.
- Therefore, as has commonly been the trend, it is the micro businesses within the sample that were less likely to have used the online grant services.

Employers are generally satisfied with all aspects of the grants process.

- Again satisfaction is high across the board and an improvement on what was reported in 2015.
- All users of the Online Grant Services were satisfied, although more were 'fairly satisfied' (61%) than 'completely satisfied' (39%) so there is still potential for improvement.
- Over half of employers that had claimed a grant were 'completely satisfied' with the ease of doing so (54%). This is an interesting finding, as in other areas of the report, reasons for dissatisfaction among some employers have been linked to the complexity of claiming a grant. This could be an indication that the process is easy, but only when you know how or have some advice from CITB NI.
- There were very low levels of dissatisfaction with any aspect of the grants process. However, when asked what improvements could be made to the current grants scheme, the most common responses, from employers that could give one, included:

- More grants information and awareness (48%)
- Higher level of grant aid (32%)
- Clearer terms and conditions (25%)
- Grant to cover wages / travel expenses (14%)
- Grants to cover more courses (33%)
- Standardise the application process (17%)

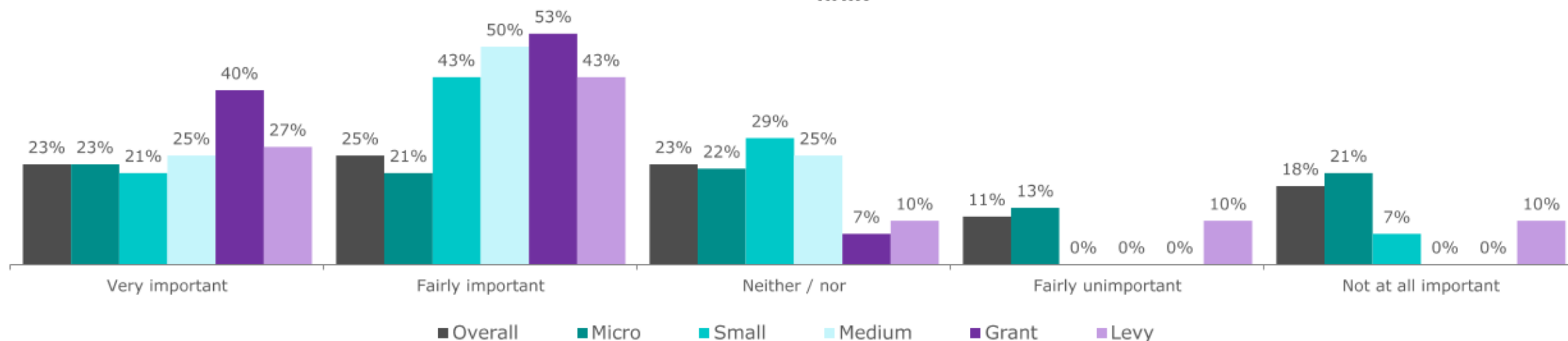
How satisfied have you been with the following aspects of the grant process?



Half of employers feel the levy and grant system is important in maintaining the level and quality of training within their own company.

- Half of employers feel the levy and grant system is important in maintaining the level and quality of training within their own company (48%). However, overall views are quite mixed with 29% disagreeing and 23% being ambivalent.
- The results are similar to 2015, although there are less employers that feel it is 'not at all important' in 2016 (18% compared to 32% in 2015). In 2014 61% of employers felt that the levy and grant system was important in maintaining levels and quality of training, so 2016 agreement is not quite back up to this level.
- 75% of medium businesses felt the levy and grant system was important in maintaining training, as did 64% of small businesses. The proportion falls among micro businesses to 43%.
- Just one employer from the small and medium businesses disagreed that the levy and grant system was important for maintaining the level and quality of training (7%).

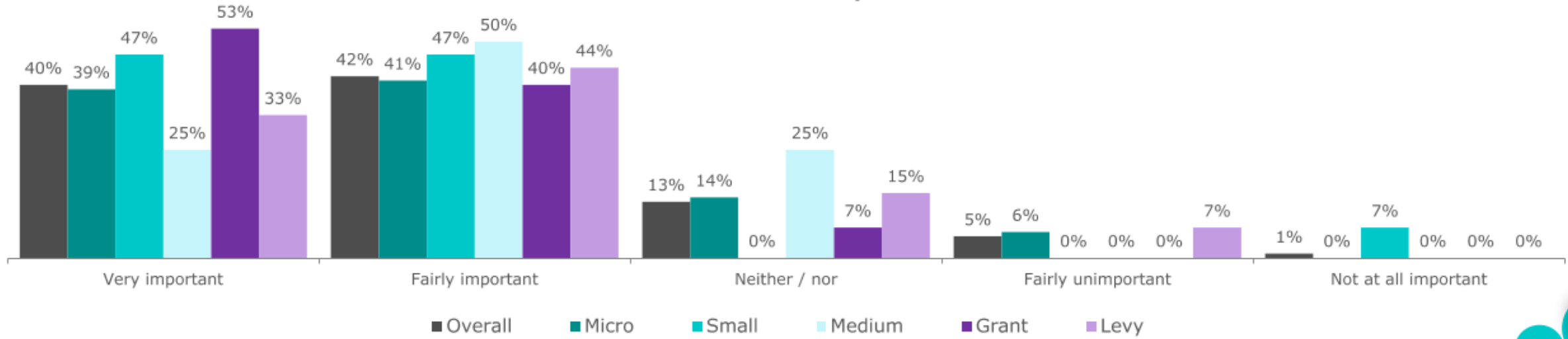
How important do you feel the levy and grant system is in maintaining the level and quality of training within your own firm?



8 in 10 employers see the benefit of a levy and grant system on the level and quality of training within the industry as a whole.

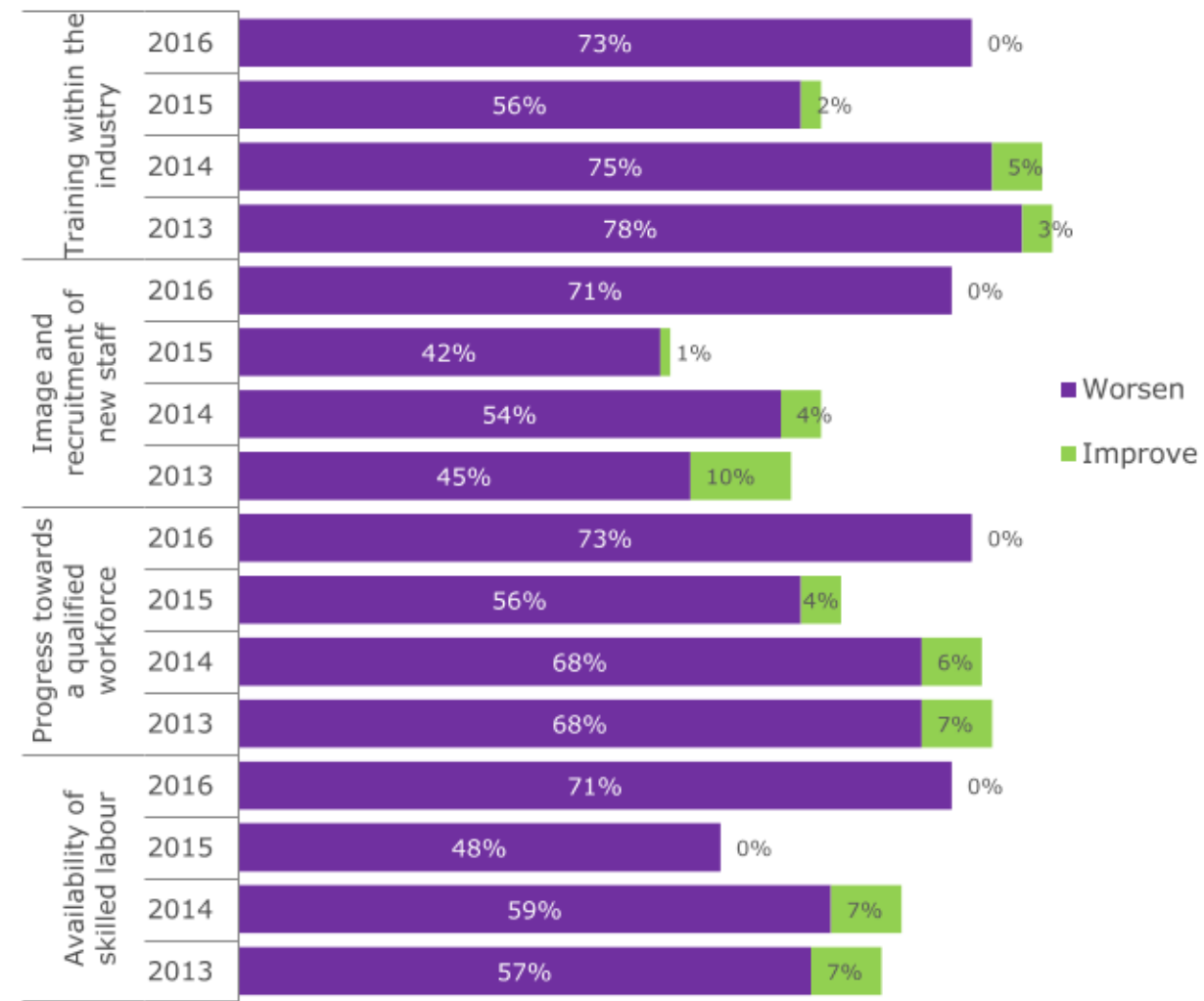
- When considering the levy and grant system in terms of the impact it has on maintaining the level and quality of training across the construction industry as a whole, there is a significant increase in the proportion of employers that feel it is important (82%).
- The group with the strongest feelings are those that have previously been in receipt of a grant, 53% feel the levy and grant system is 'very important' and a further 40% feel it is 'fairly important' in maintaining the level and quality of training in the industry.
- The proportion of employers that cited the levy and grant system is important for the industry has risen since 2015 (69%) and is the highest level reported to date (74% in 2014 and 66% in 2013).
- Therefore, it is clear that although not all employers see the benefits of the levy and grant system in terms of the training they conduct themselves, they clearly see the benefit of it when considering the industry as a whole. This comes back to an earlier point, that employers do not necessarily see the benefit of CITB NI to their own business and although in general they are satisfied with what CITB NI do for the industry, they need to see how they themselves can benefit.

How important do you feel the levy and grant system is in maintaining the level and quality of training across the construction industry as a whole?



A statutory training body such as CITB NI is perceived as being very important for the industry.

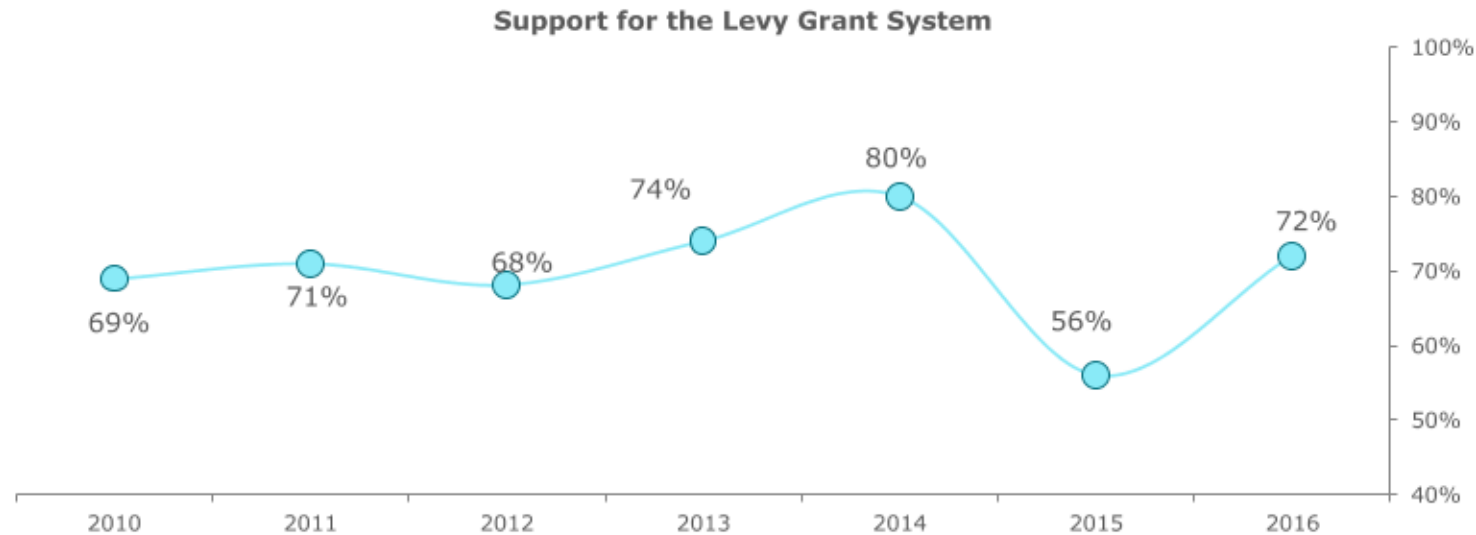
If there was not a statutory training body such as CITB NI, what impact would this have on the industry as a whole in terms of...



- 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.
- This year no employers felt that there would be improvement in any aspect if there were no statutory training body such as CITB NI. About a quarter of employers felt the industry would stay the same in terms of each of the aspects tested.
- When allowing for sample size, all four areas are perceived very similarly by employers, with just under three quarters of employers feeling the industry would be worse off in each area without a statutory industry body such as CITB NI.

Nearly three quarters of employers are in agreement that the levy and grant system should continue.

- The majority of employers believe the levy and grant system should continue (72%). This is in line with the years prior to 2015.
- All of the medium businesses felt it should continue along with 80% of small businesses and 69% of micro businesses.
- The proportion of levy payers and non levy payers in agreement is very similar (73% and 71% respectively).
- Among those that do not feel the levy and grant system should continue, the common reasoning is listed below and a clear problem is that employers do not feel they can apply the benefits of CITB NI to their own business.
 - It has no real benefit for us (100%)
 - It favours larger companies (44%)
 - The system is inconsistent (13%)
- Other responses cited by individuals only include: they do not provide the training/staff our industry needs, I don't consider myself to be in the construction industry and it is an administrative burden.



Conclusions & Recommendations

Conclusions

- Prompted awareness of CITB NI's products and services was generally high. There was a new product added to the questionnaire this year that had low levels of prompted awareness, training in virtual environment (VET360). Since this is a new service added to the questionnaire for 2016 it could be an area for CITB NI to promote more among employers for 2017.
- CITB NI remains primarily associated with services relating to training, such as providing grants for training, health and safety information and training and specialist courses, rather than being associated with the work it does for the image and future of the industry.
- There is a clear distinction between Organisation size and their engagement with CITB NI through the use of products and services. Three quarters of micro businesses had not used any services offered by CITB NI in the last 12 months.
- There has been a reduction in nearly all communication methods cited in 2016 and an increase of 19% in the proportion of employers citing that they have not heard about CITB NI through any form of communication in the past 12 months. This is a concerning finding and it is important to discover whether this is due to a reduction in the communication sent out by CITB NI or whether communication is not getting through to employers and if so the reasons why not. If it is not due to a reduction in the amount of communication CITB NI are sending out, this could be linked to the sharp fall in postal communications. Therefore, to understand this, it would be worthwhile carrying out some research into the efficacy of individual communication methods so that CITB NI can weigh up the cost benefit of a more expensive postal route over emails.
- Where employers have contacted CITB NI in the past 12 months, nearly all rated the response they got as 'extremely helpful' which is a very encouraging finding and one which hopefully CITB NI are able to carry through to 2017 and beyond.
- When looking at satisfaction with the overall service CITB NI provides to the industry, levy payers have a higher overall satisfaction than non levy payers. This is a positive finding because previously there has been a feeling of resentment among some levy payers towards CITB NI, which resulted in them being less satisfied than non levy payers. These feelings may be starting to subside and understanding the reason for this improvement may help to further decrease dissatisfaction among employers given the reasons they report for dissatisfaction mainly relate to the levy and not receiving anything in return.

Conclusions

- Employers were asked what CITB NI could do to improve their service and relationship with them, the responses had a clear theme of information. Employers are aware that they do not know enough about CITB NI and its offering to be getting the most out of them. This should be another key area of focus of CITB NI, implementing the findings from this research to communicate efficiently and effectively with employers to raise their engagement with CITB NI.
- Awareness of employer events was particularly low for 2016 and the results suggest that in 2016 there were either less events or the advertisement of them was less successful than it has been in previous years. This is an area that CITB NI should follow up on.
- It is clear that although not all employers see the benefits of the levy and grant system in terms of the training they conduct themselves, they clearly see the benefit of it when considering the industry as a whole. This comes back to an earlier point, that employers do not necessarily see the benefit of CITB NI to their own business and although in general they are satisfied with what CITB NI do for the industry, they need to see how they can benefit themselves.

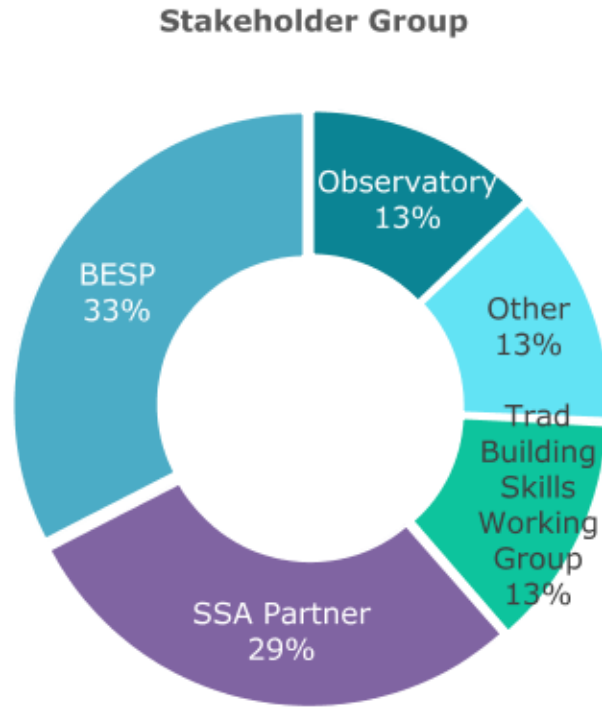
Recommendations

- Was the reduction in awareness of employer engagement events due to a reduction in the events themselves or has the communication of such events been less effective in the past 12 months? If it is the latter, CITB NI would benefit from investigating why the efficacy of event marketing has decreased.
- Prompted awareness of CITB NI's products and services was generally high although only a third of employers were aware of the new product, training in virtual environment (VET360). This could be an area for CITB NI to promote more among employers for 2017.
- If the increase in employers that have not heard from CITB NI in the past 12 months is not due to a reduction in the amount of communication CITB NI are sending out, this could be linked to the sharp fall in postal communications. Therefore, to understand this, it would be worthwhile carrying out some research into the efficacy of individual communication methods so that CITB NI can weigh up the cost benefit of a more expensive postal route over emails.
- The area with the lowest success rating for CITB NI's communications is being relevant to and appropriate for employer's businesses. This has historically been the lowest rated aspect of communication and therefore indicates that CITB NI may have more of an impact with their communication if they were able to make it more tailored to individual business needs. Future surveys could probe this area in more detail to understand how CITB NI can improve and what employers want to see in this type of communication.
- Employers are aware that they do not know enough about CITB NI and its offering to be getting the most out of them. Therefore, CITB NI need to ensure they are communicating how they can benefit businesses in general but also on a more individualised level. Which links to the point made above.
- Over half of employers that had done so were 'completely satisfied' with the ease of claiming a grant, this was an interesting finding, because the complexity of claiming a grant can often be cited as a reason for dissatisfaction with CITB NI. It would be informative in future surveys to find out the level of help employers had from CITB NI before and during the process because this would indicate the level of support that is needed for a smooth grant application.

Part 2 – NI Stakeholder Research

Sample

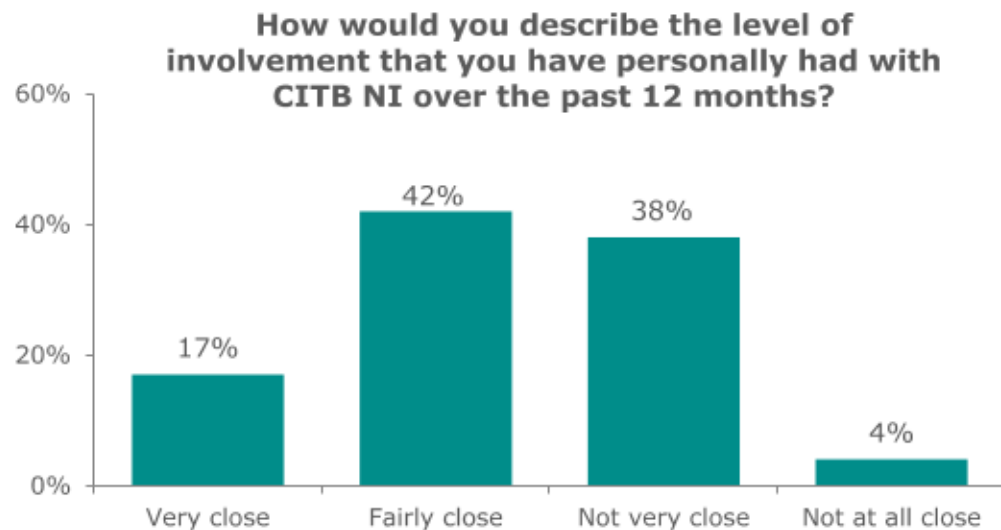
Stakeholders were from a range of groups.



- There were 24 stakeholders in the sample from Northern Ireland.
- Stakeholders were from a mix of groups, although mainly SSA partners (29%) and BESP (33%).
- Note that due to a small sub sample size, percentages need to be treated with caution as large variances will not be statistically significant.

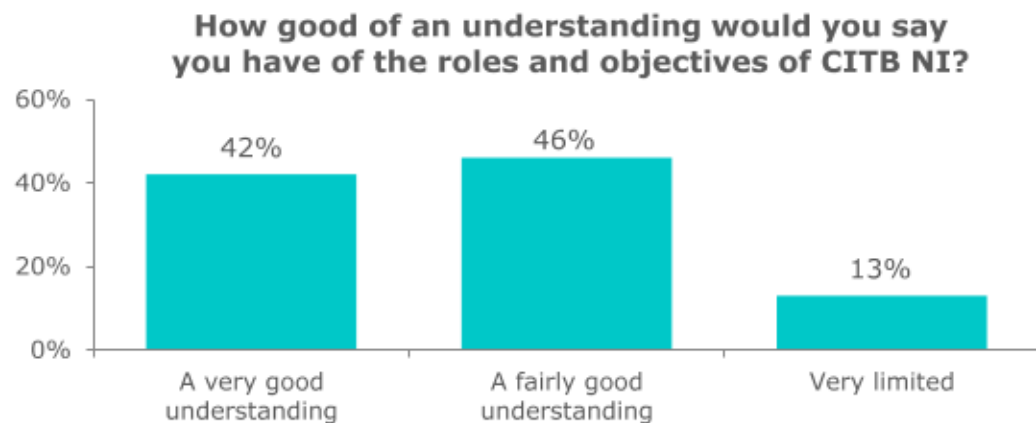
Awareness and understanding of CITB NI

The majority of stakeholders feel closely involved with CITB NI.



- Overall 59% of stakeholders felt they have a close involvement with CITB NI, 17% thought they had a very close involvement.
- Just one stakeholder cited that they felt 'not at all' close to CITB NI (4%). The remaining stakeholders felt 'not very close' to CITB NI (38%).
- 92% of stakeholders felt they knew who to contact if they wanted to discuss specific issues. Of the 8% (2 stakeholders) that did not know who to contact, both classified themselves as an SSA Partner.

Most have a good understanding of CITB NI.

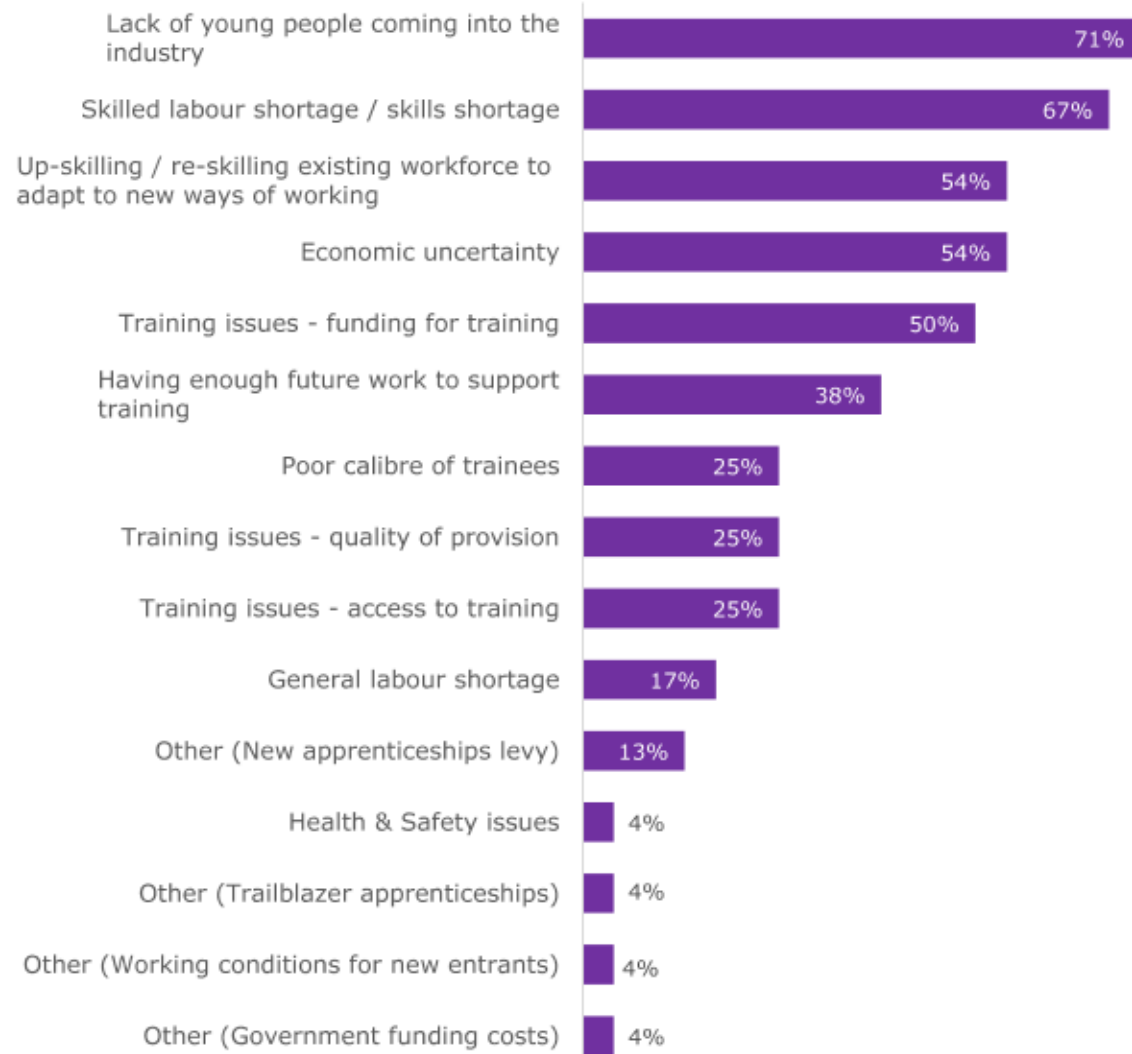


- 88% of stakeholders felt they have a good understanding of CITB NI's roles and objectives. They were marginally more inclined to state 'fairly good' (46%) rather than 'very good' (42%).
- 13% of stakeholders felt they have a limited understanding of CITB NI's roles and objectives. Of these 3 stakeholders, 2 were classified as an SSA Partner and the third was BESP.
- When asked what they felt CITB NI had been set up to do the most commonly cited responses were: support up-skilling, re-skilling and conversion training (96%) and improve/maintain standards of training within industry (96%). Both responses were cited by 23 out of 24 stakeholders.
- The views stakeholders hold of CITB NI's roles and objectives do reflect those of employers given the top three most commonly cited objectives for CITB NI are linked to training.

What has CITB NI been set up to do?	2016 (%)
Support up-skilling, re-skilling and conversion training	96%
Improve/maintain standards of training within industry	96%
Promote the benefits of investing in training	92%
Identify current and emerging skills needs	88%
Influence the education and training system	88%
Provide research/evidence on skills in construction	83%
Grants/funding employers for training	83%
Improve the image of the industry and raise awareness of construction careers	71%
Develop a competent and safe workforce	63%
Improve the understanding of the different routes into the industry and the benefits of a career in construction	58%
Influence industry and Government policies	46%
Support the industry to adapt to new ways of working	42%
Encourage greater employer ownership of skills	42%
Help construction businesses grow	38%
Support the industry sectors with bespoke solutions	38%
Promote talent management and career development	33%
Help clients to develop strong supply chains	21%
Promote the industry as a career for young people	8%
Support the construction industry with training and delivery	4%
Provide / promote apprenticeships	4%
Provide guidance and advice for the industry	4%

Stakeholders are most concerned about a lack of young people coming into the industry.

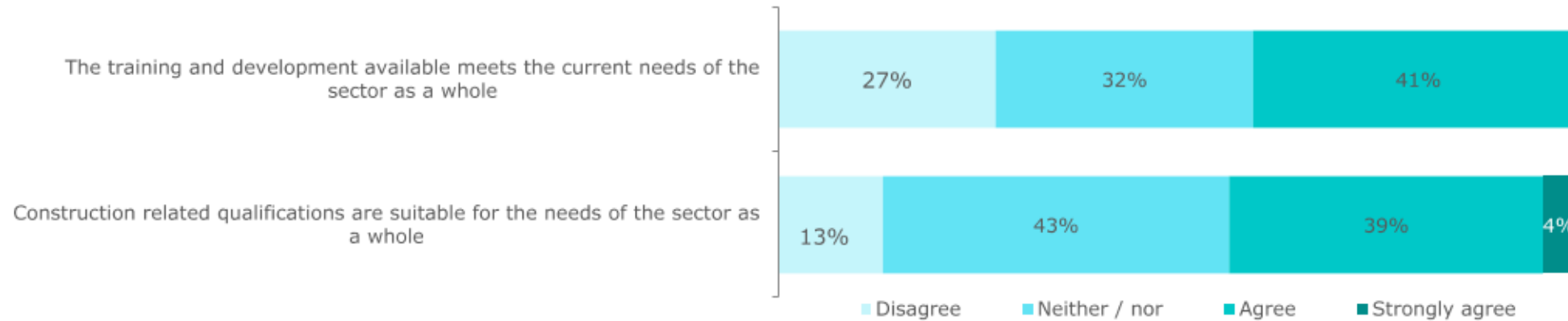
What are the most important skills issues the construction industry will face in the next year or so?



- Stakeholders are mainly concerned about a lack of young people coming into the industry (71%). It is interesting that only 9% of stakeholders thought CITB NI was set up to promote the industry as a career for young people.
- There is also a concern that there will be a skills shortage (67%).
- Of the different types of training issues, funding for training was seen as the most concerning, half of stakeholders felt this is an important skills issue that the industry will face in the next year or so (50%).
- Over half felt that up-skilling or re-skilling the existing workforce to adapt to new ways of working would be an issue (54%). Therefore, stakeholders are sensitive to the fact that there are changes within the industry and it is a concern that the current workforce will need to evolve their skill set to adapt.
- Areas of less concern were apprentices, 13% felt the new apprentice levy would be an issue and 4% felt trailblazer apprenticeships would be a problem.
- Health and Safety was also low down in the rankings, just 4% of stakeholders thought there could be issues in this area in the next year or so.

There is not a strong degree of confidence among stakeholders regarding availability and suitability of training and development within the industry.

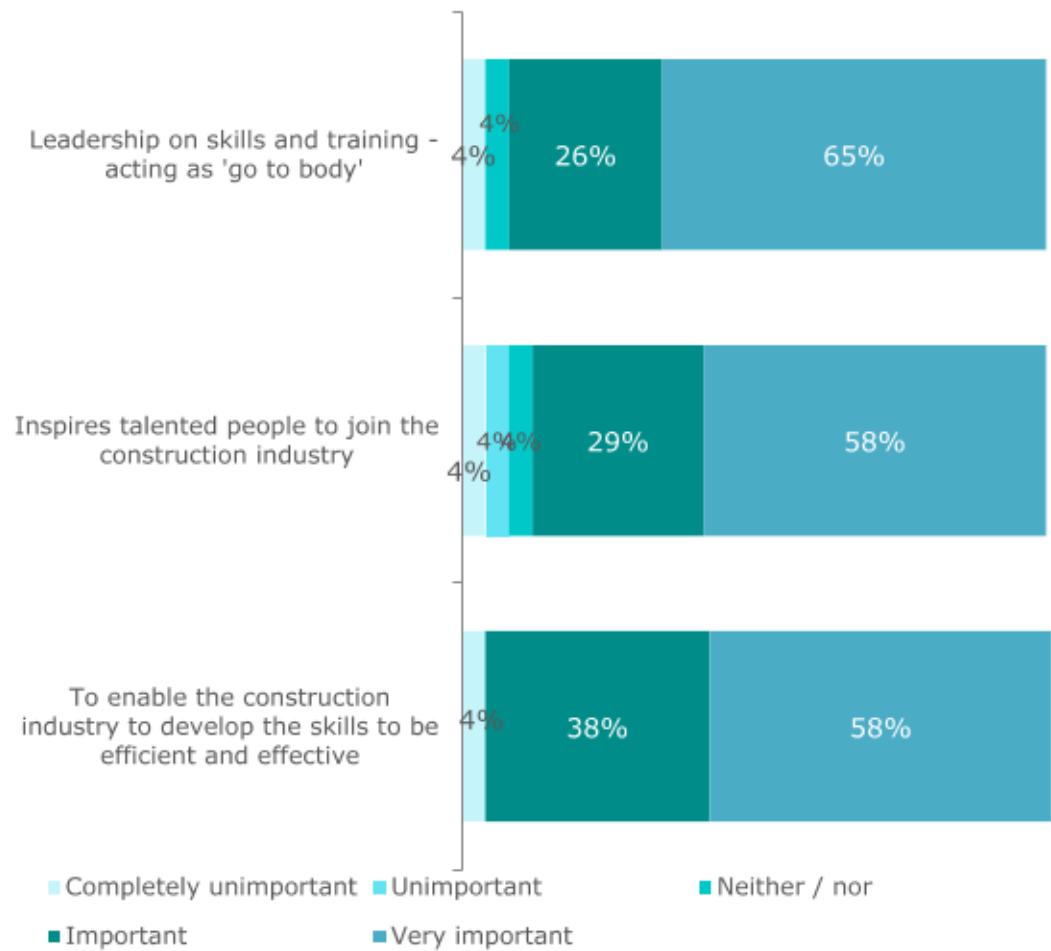
To what extent do you agree with these statements about the availability of training and development in the construction industry?



- There are quite mixed views among stakeholders regarding training and development in the construction industry.
- There is a high level of ambivalence for both statements indicating a lack of knowledge among stakeholders regarding whether training and development is meeting current needs of the sector (32%) and whether the qualifications are suitable for the needs of the industry (43%).
- A quarter of stakeholders disagree that the training and development available meets the current needs of the sector as a whole (27%). However, the majority agree that the training and development available does meet the needs of the industry but note that no stakeholders were in strong agreement with this statement.
- 43% of stakeholders were in agreement that construction related qualifications are suitable for the needs of the industry, however, an equal proportion had no strong feelings towards this statement. Therefore, despite just 13% disagreeing, it is not the case that stakeholders feel confident enough in construction related qualifications to provide what the industry needs.

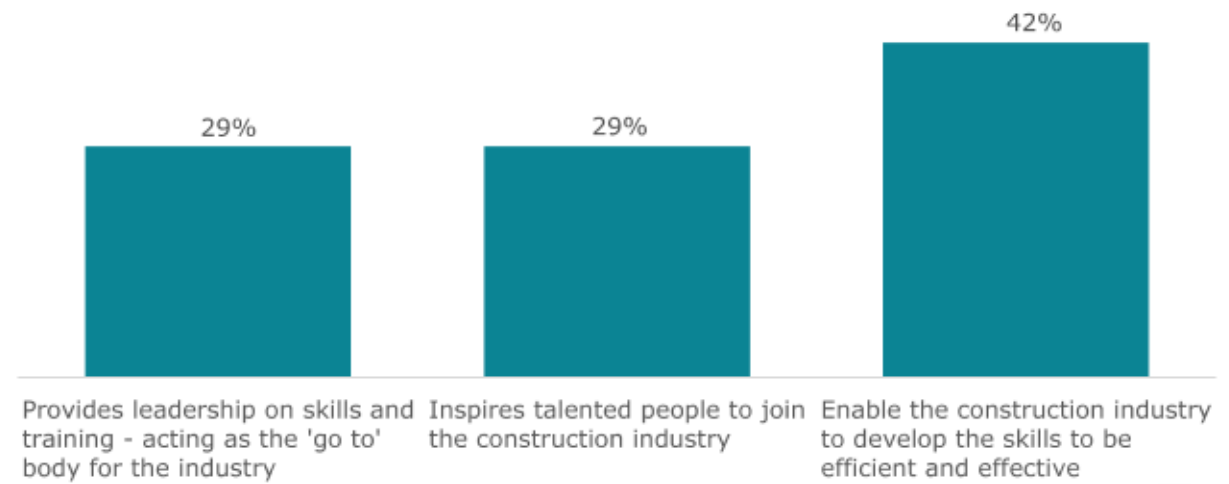
All areas are important but the highest priority should be to enable the construction industry to develop the skills to be efficient and effective.

How important is it that CITB NI provides.....



- Stakeholders view all three areas as important for CITB NI succeed in.
- Two thirds of stakeholders felt it is 'very important' that CITB NI provides leadership on skills and training – acting as a 'go to' body for the industry (65%). This is the highest proportion of top ratings for the three areas of focus.
- When asked to pick which one of the three areas should be the highest priority for CITB NI to focus on, responses were split, but most commonly cited was enabling the construction industry to develop the skills to be efficient and effective (42%).

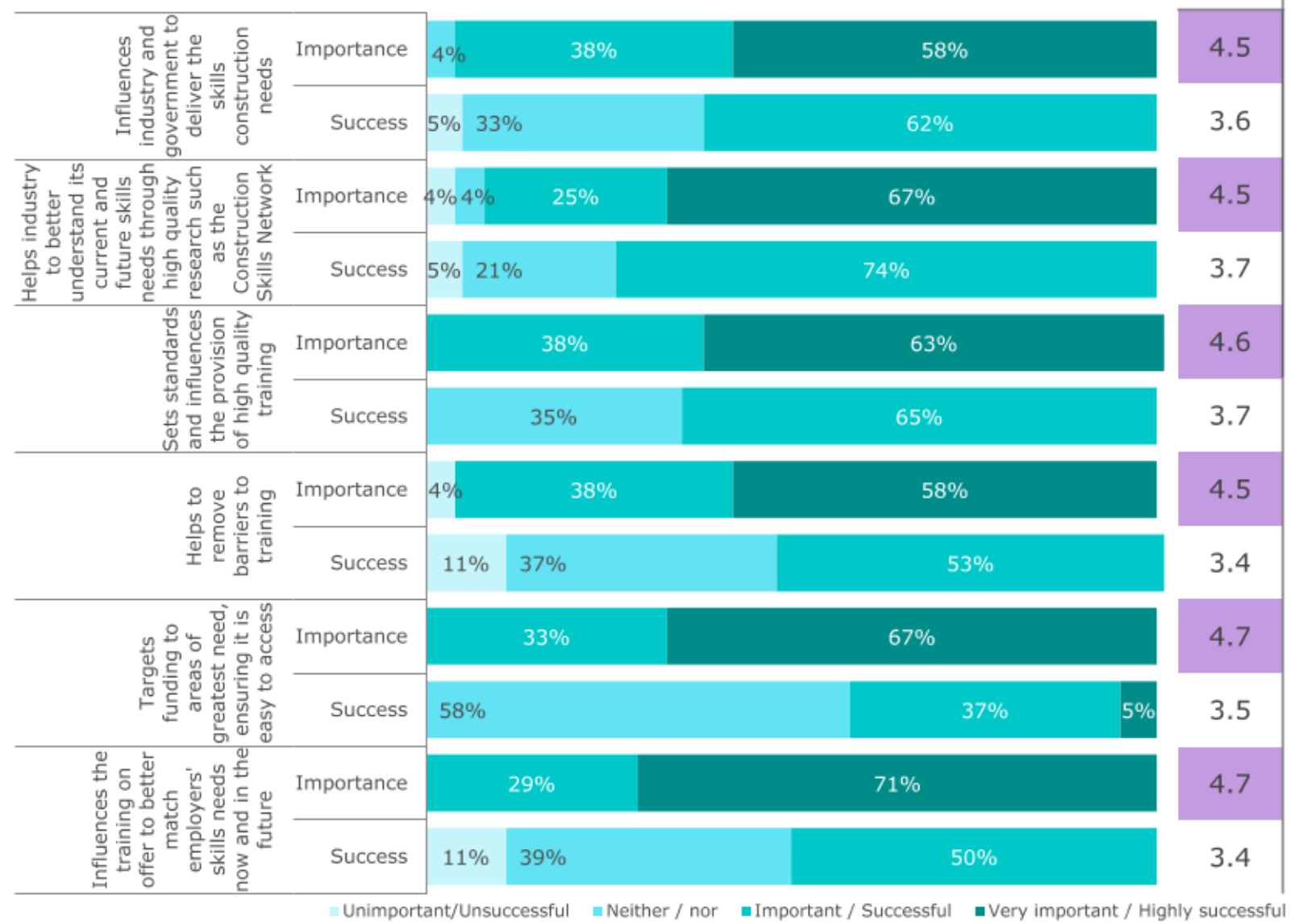
What should be the highest priority for CITB NI?



Strategic Leadership

All objectives are important to stakeholders but not all had strong opinions of CITB NI's success in them.

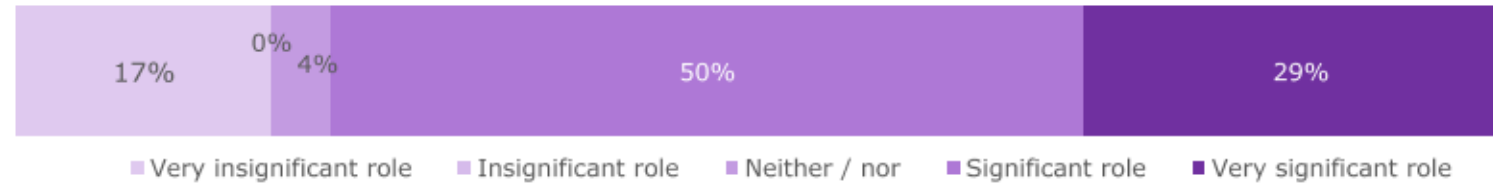
Importance of and CITB NI's success in meeting objectives



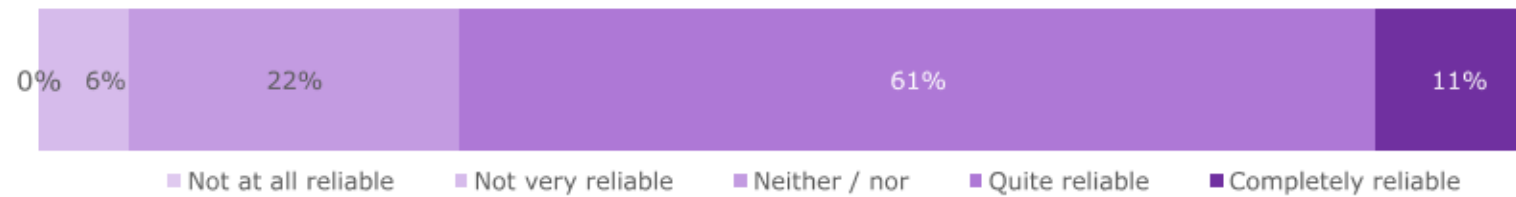
- Stakeholders were first asked how important they felt it is that CITB NI undertake a range of strategic leadership objectives and then how successful they feel CITB NI have been in meeting these objectives. Mean scores are shown to the side of the chart.
- CITB NI's success does not match up to the importance in all areas. However, this is partly due to the proportion of stakeholders citing a rating of 3 – neither/nor for CITB NI's success, whereas there were very low levels of ambivalent ratings for importance of the objectives.
- The area CITB NI is viewed as being most successful in was helping the industry to better understand its current and future skills needs through high quality research such as the Construction Skills Network, three quarters of stakeholders felt CITB NI is successful in this area (74%).
- Three objectives were rated as important by all stakeholders, these were: setting standards and influencing the provision of high quality training, targeting funding to areas of greatest need, ensuring it is easy to access and influencing the training on offer to better match employers' skills needs now and in the future.

CITB NI is perceived as having a significant role in setting the standard for training in construction.

To what extent do you see CITB NI as having a leading role in standard setting for training in construction?



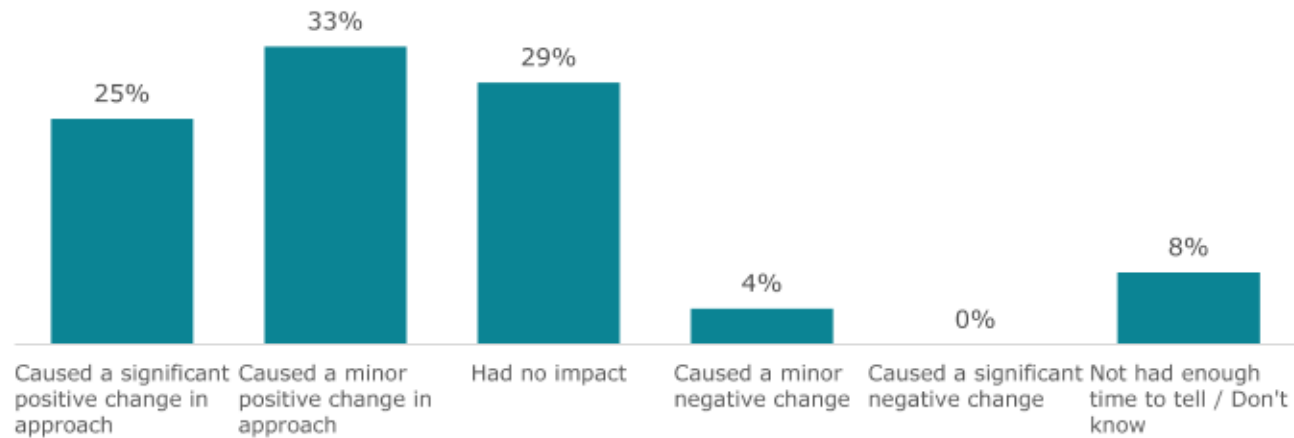
CITB NI has a programme of work looking at how skills supply matches demand. How reliable would you consider CITB NI's work in this area?



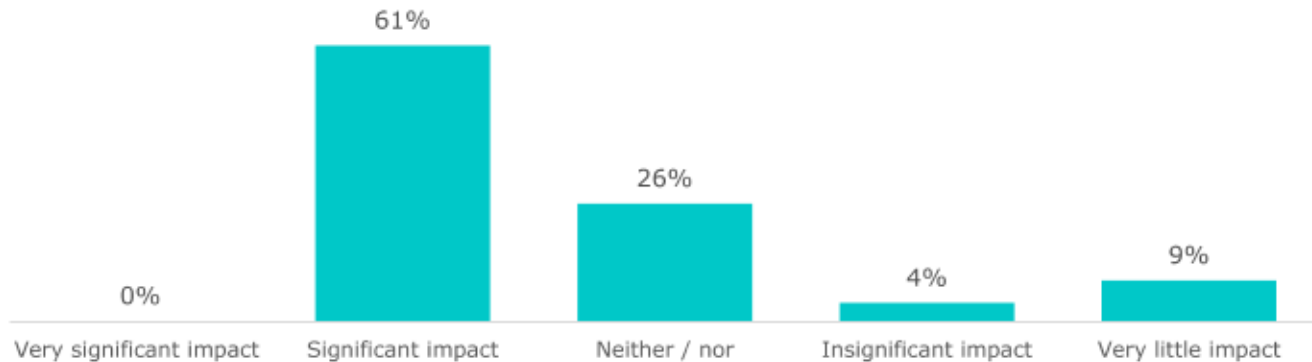
- CITB NI is seen as having a significant role in setting the standard for training in construction by over three quarters of stakeholders (79%).
- 17% (4 stakeholders) felt that CITB NI have a very insignificant role in setting the standard for training in construction. Of these stakeholders, three (75%) noted their stakeholder group as Observatory and one (25%) noted their stakeholder group as BESP. This is an interesting finding as all of these stakeholders felt CITB NI had been set up to identify current and emerging skills needs, influence the education and training system and provide research/evidence on skills in construction.
- The majority see CITB NI's programme of work looking at how skills supply matches demand as 'quite reliable' (61%), overall 72% see this program of work as reliable.
- Just under a quarter of stakeholders gave an ambivalent rating, indicating that they were perhaps not quite knowledgeable enough to have any strong feelings either way (22%).

CITB NI has caused a positive change in the approach to training and skills development in over half of stakeholders.

Over the last 12 months, how have your dealings with CITB NI influenced your approach to training and skills development?



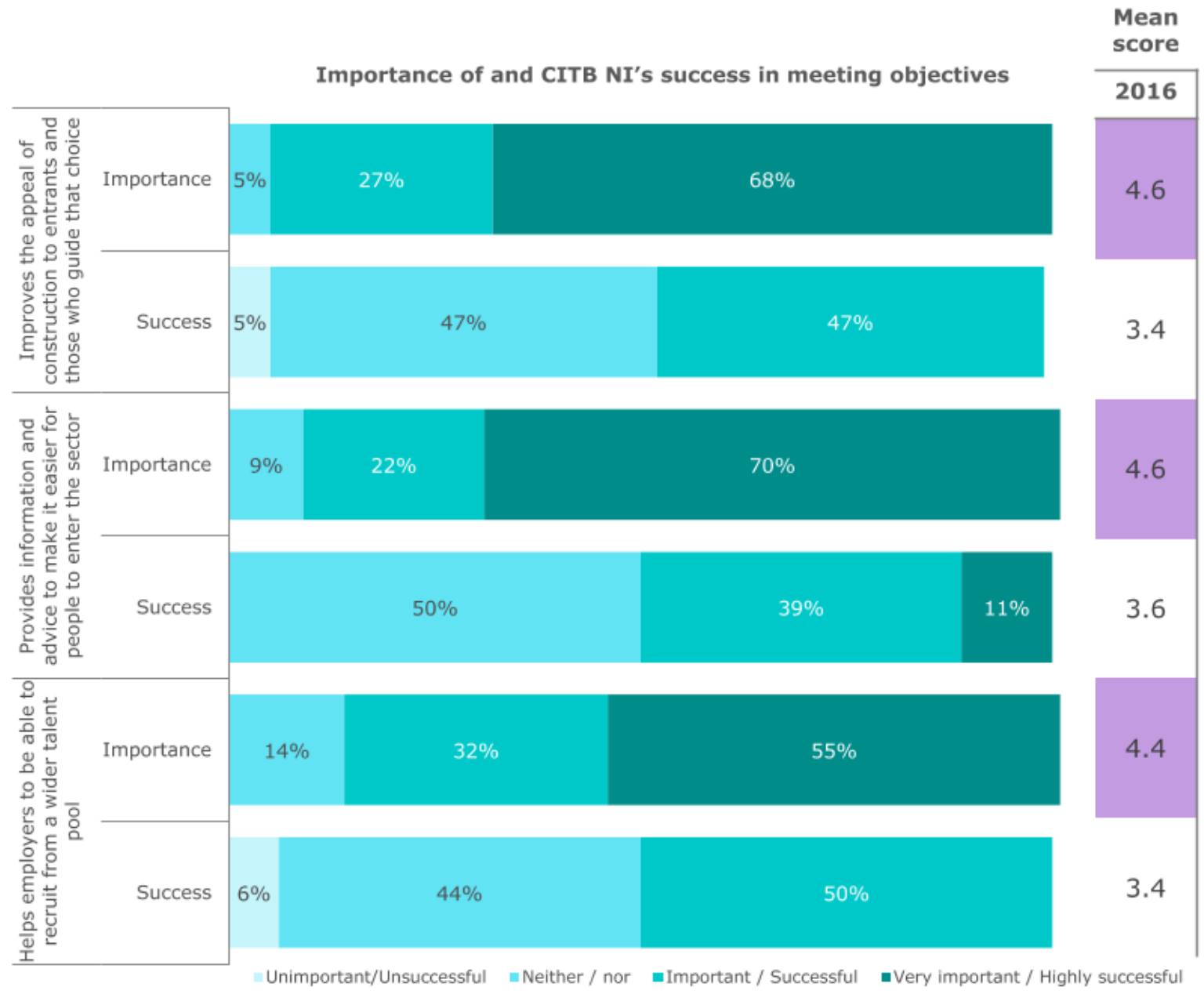
Overall what impact has CITB NI had as a 'go to' body for construction skills and training?



- For a quarter of stakeholders, CITB NI has had a significant positive impact on their approach to training and skills development (25%).
- Overall, dealings with CITB NI has brought about a positive change to the approach of 58% of stakeholders towards training and skills development.
- Just one stakeholder felt dealings with CITB NI had caused a minor negative change to their approach to training and skills development. This stakeholder was from the Traditional Building Skills Working Group stakeholder group.
- The majority of stakeholders felt CITB NI has had a significant impact as a 'go to' body for construction skills and training (61%). However, no stakeholders thought CITB NI has had a very significant impact.
- 13% felt CITB NI has had little impact as a 'go to' body. Of these 3 stakeholders, all were from the SSA Partner stakeholder group and described their involvement with CITB NI over the past 12 months as 'not very close'.
- Overall, the feeling towards CITB NI's influence and impact is positive. It would be interesting to find out why there are a small proportion of stakeholders that do not feel positively towards CITB NI in these areas.

Image, culture and recruitment

CITB NI's success is not seen as matching up to the importance of objectives.



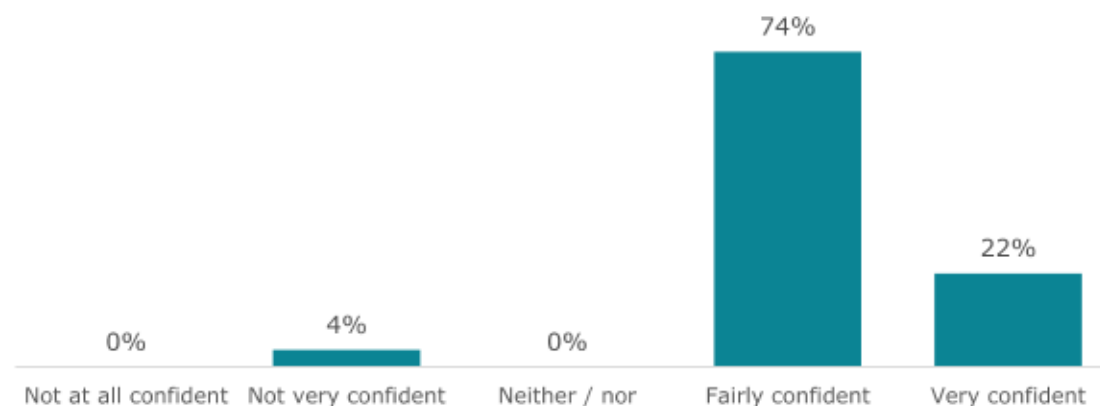
- Helping employers to recruit from a wider talent pool (87%) was seen as slightly less important than the other two objectives of improving the appeal of construction to entrants and those who guide that choice (95%) and providing information and advice to make it easier for people to enter the sector (92%).
- Of those that felt able to rate CITB NI's success in each objective, half of stakeholders thought CITB NI had been successful in meeting each one. However, about a quarter of stakeholders did not feel knowledgeable enough to rate each objective and so cited 'don't know'.
- Again, CITB NI's success is not viewed equally to the importance of the objectives.

Developing the industry's skills

Nearly all stakeholders are confident they know where to go for information, help or advice on developing skills or training.

- Nearly all stakeholders would be confident on where to go if they wanted information, help or advice in the future on developing skills or training from someone outside their company (96%).
- The organisations that they would be most likely to approach are:
 - Further education college (46%)
 - CITB NI (42%)
 - Private training provider (21%)
 - Other federation, trade association or professional body (17%)
 - ConstructionSkills (17%)
 - Department for the Economy (13%)
 - Higher education (Universities) (8%)
 - Sector Skills Council (SSC) (8%)
 - CIC (Construction Industry Council) (8%)
 - National careers service (4%)
 - Internet / Google searching (4%)
 - Federation of Master Builders (FMB) (4%)
 - Construction Industry group (4%)
- The two main organisations that stakeholders would consider approaching are clear, they are FE colleges and CITB NI.
- Marginally more stakeholders would approach a further education college (46%) than CITB NI, although CITB NI is the second most popularly mentioned organisation (42%).

If you wanted information, help or advice in the future on developing skills or training from someone outside your company, how confident would you be on where to go?

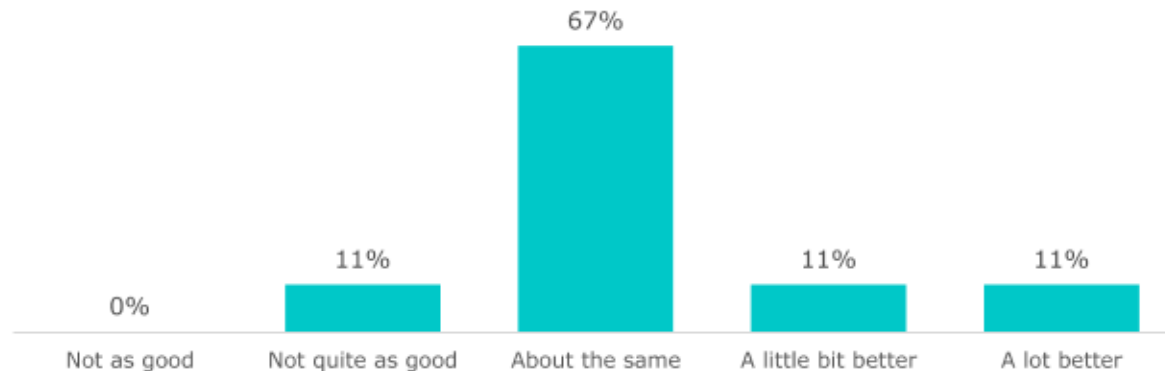


Nearly all stakeholders would be likely to approach CITB NI for information, help or advice.

How likely would you be to approach CITB NI if you needed information, help or advice on skills



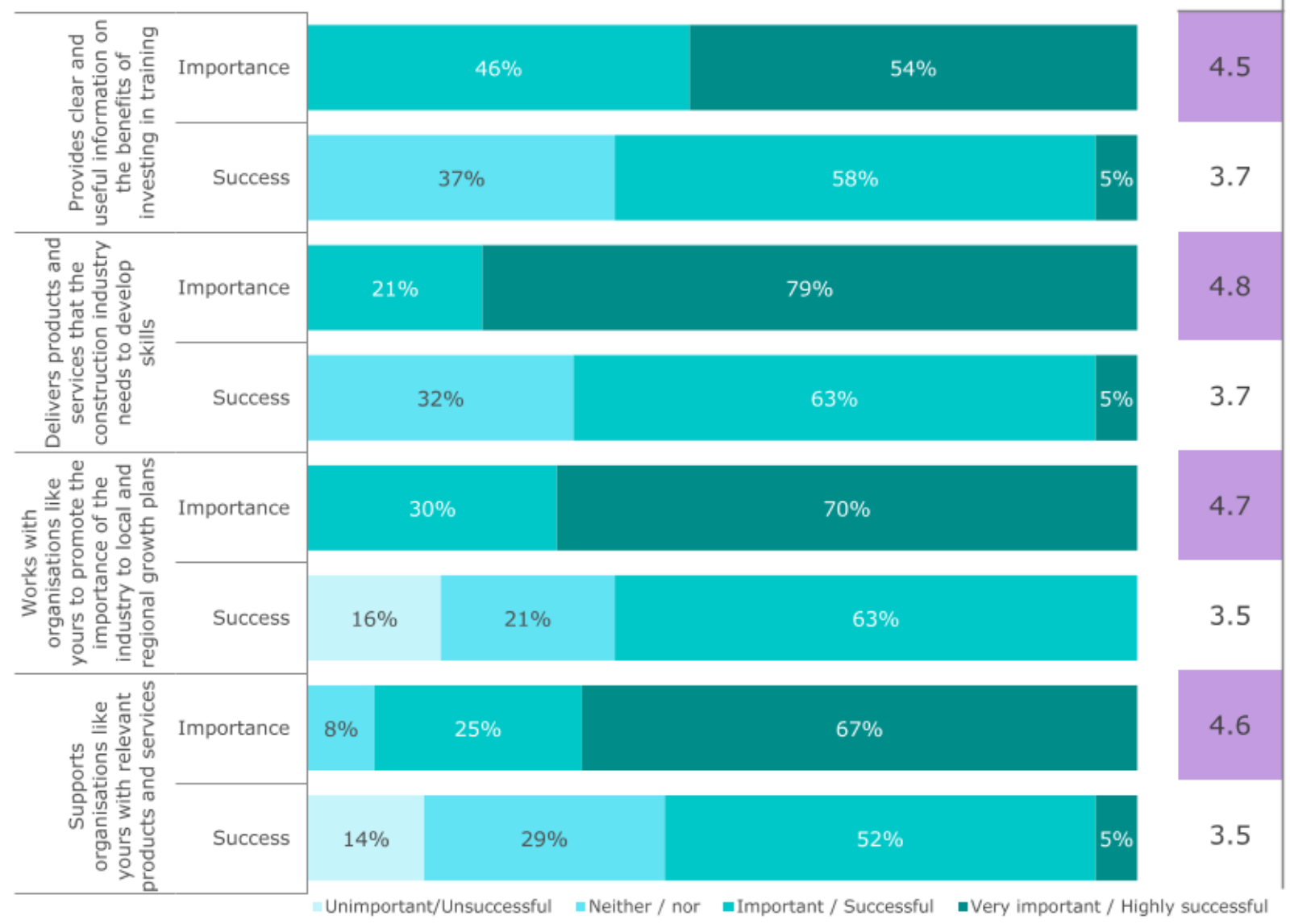
On the whole, how does CITB NI's information, help or advice compare to other organisations?



- Despite just under half of employers citing CITB NI as an organisation they would approach without prompting, upon prompting, 92% of stakeholders said they would be likely to approach CITB NI for information, help or advice on skills. This is a very positive finding.
- Just 2 stakeholders (8%) said they would not be very likely to approach CITB NI for such matters. One was from the SSA Partner stakeholder group and described their level of involvement with CITB NI as 'not very close' over the past 12 months. The other stakeholder was from the Traditional Building Skills Working Group and described their level of involvement with CITB NI as 'fairly close' over the past 12 months.
- Where other organisations provide similar information help or advice on skills to CITB NI, 42% of stakeholders have used these organisations in the past 12 months.
- Within the group of stakeholders that have gone to other organisations within the past 12 months, the majority say that the level of information, help or advice provided by CITB NI is about the same (67%). Other responses were cited by single stakeholders.

The key objective here is delivering products and services that the construction industry needs to develop skills.

Importance of and CITB NI's success in meeting objectives



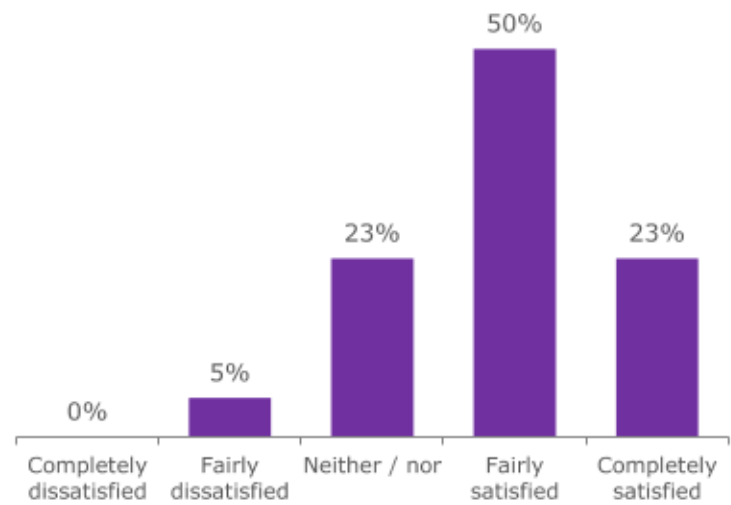
- Once again importance has higher means than success and ratings of CITB NI's success has higher proportions of ambivalent ratings than importance.
- 79% of stakeholders felt it is 'very important' that CITB NI delivers products and services that the construction industry needs to develop skills. This is the objective stakeholders feel most strongly about.
- Encouragingly, delivering products and services that the construction industry needs to develop skills is the objective CITB NI are seen as being more successful in (63%). Although, just 5% of stakeholders thought CITB NI is highly successful in this area, so there is still room for improvement.

■ Unimportant/Unsuccessful ■ Neither / nor ■ Important / Successful ■ Very important / Highly successful

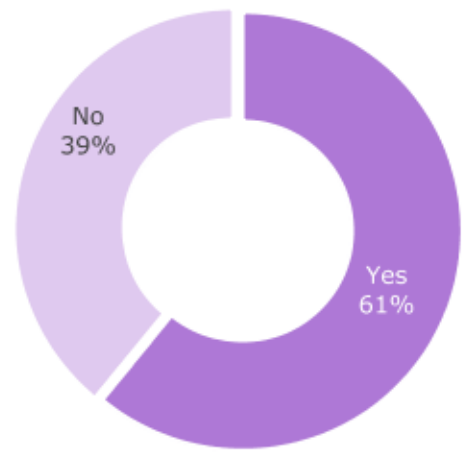
Overall satisfaction and attitudes towards CITB NI

Just under two thirds of stakeholders have recommended CITB NI to someone.

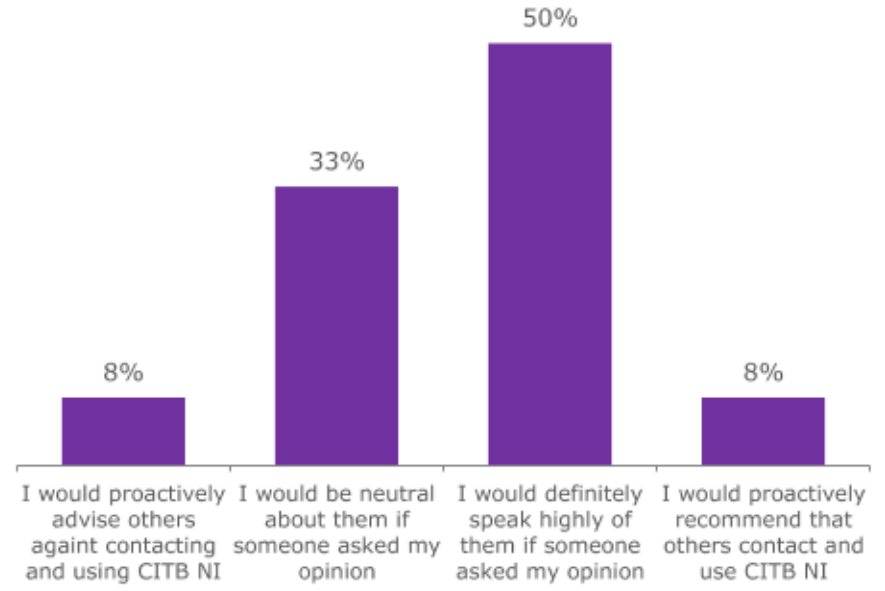
How satisfied are you with the overall service CITB NI provides for the industry as a whole



In the last 12 months have you actually recommended CITB NI to someone?



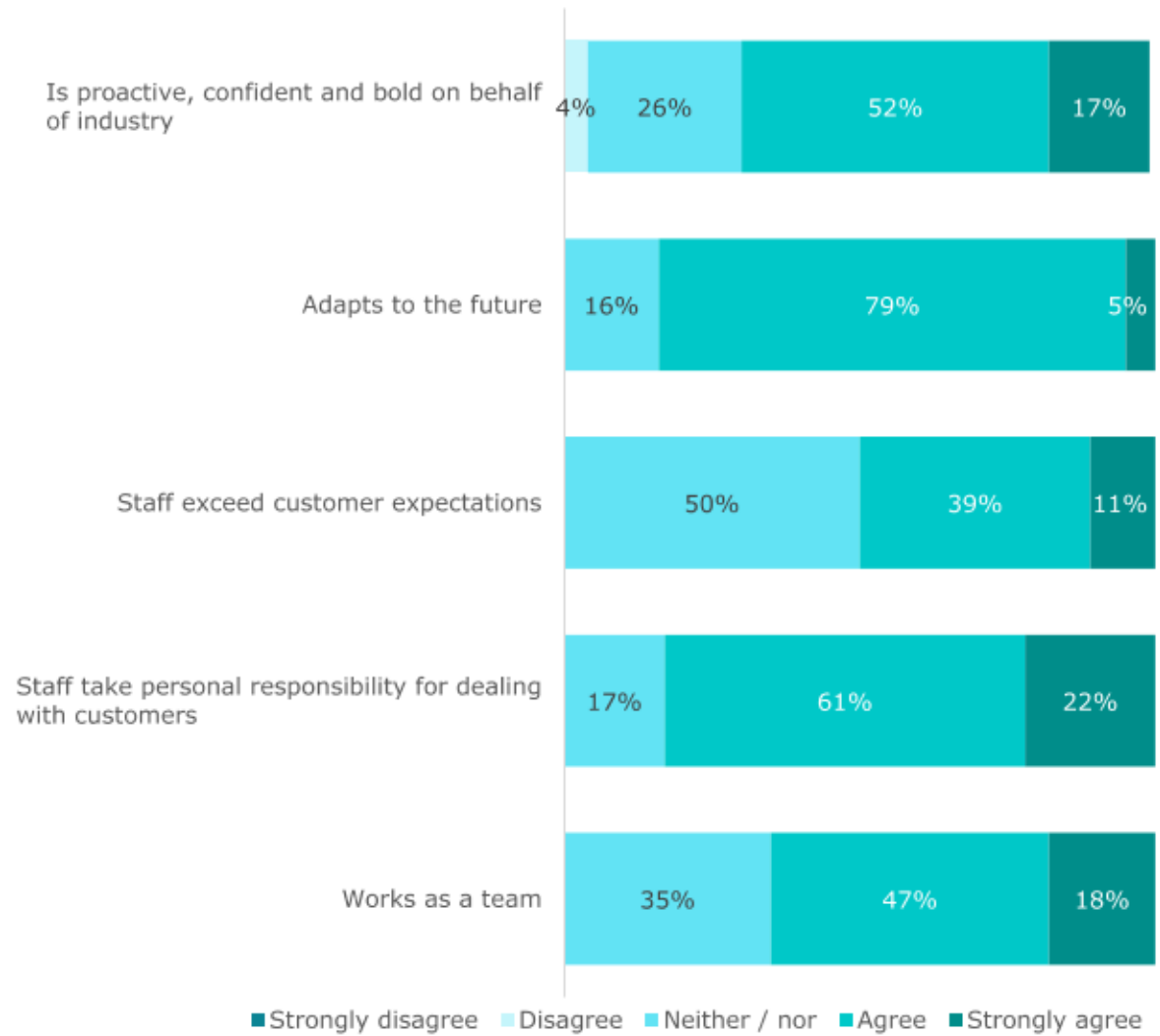
Based on your experience with CITB NI, how likely are you to recommend it to others?



- Three quarters of stakeholders are satisfied with the overall service CITB NI provides the industry as a whole (73%).
- A quarter are ambivalent and 5% are dissatisfied. The dissatisfied stakeholder was from the BESP stakeholder group and described their level of involvement with CITB NI as 'very close'.
- Encouragingly, 61% of stakeholders have actually recommended CITB NI to someone in the past 12 months, a similar figure to those (58%) who stated they were likely to recommend CITB NI to others.
- A third of stakeholders would be neutral about CITB NI if asked and concerningly, 8% would proactively advise others against using CITB NI. Of the two stakeholders that would be negative, both describe their involvement with CITB NI as close.

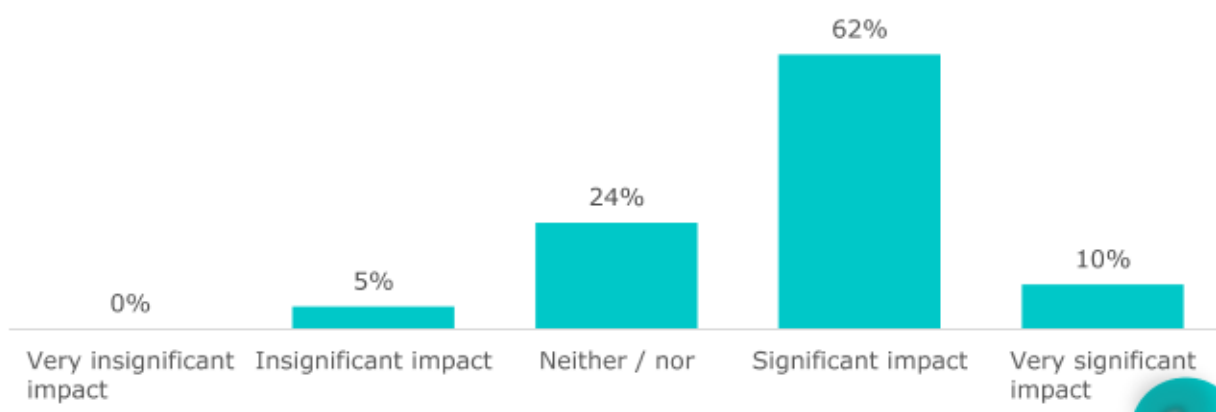
CITB NI adapts to the future and staff take responsibility for dealing with customers.

To what extent do you agree with the following statements about CITB NI?



- CITB NI was seen as having had a significant impact on enabling the construction industry to become efficient and effective (72%).
- Stakeholders most strongly agree that CITB NI adapts to the future (84%) and that staff take responsibility for dealing with customers (83%).
- The lowest levels of agreement ('agree' + 'strongly agree') are with the following statements; CITB NI staff exceed customer expectations (50%) and that CITB NI works as one team (65%).
- However, disagreement with the statements is almost non-existent. Just one stakeholder disagreed that CITB NI is proactive, confident and bold on behalf of industry (4%).

Overall, what impact do you believe CITB NI has had on enabling the construction industry to develop the skills to become efficient and effective?



Conclusions & Recommendations

Conclusions

- In line with the biennial frequency of the stakeholder survey, stakeholders were interviewed in 2016 as part of the CITB NI research.
- Just over half of stakeholders felt they had been in close contact with CITB NI in the 12 months prior to the survey, the rest did not consider their level of involvement with CITB NI as close. Would it be expected that a larger proportion of stakeholders would feel more closely engaged with CITB NI? If so it may be beneficial to probe this further in future surveys.
- A lack of young people coming into the industry and a skill shortage are the two top areas of concern for stakeholders. Therefore, research in and working towards rectifying these problem areas should continue to form part of CITB NI's objectives.
- When it came to rating CITB NI's success in a range of objectives there was a high proportion of ambivalent ratings provided. However, Stakeholders did not struggle to rate the importance of the objectives, indicating that they were opinionated and their knowledge of the industry as a whole was not an issue. Therefore, it seems there is a lack of knowledge among stakeholders of CITB NI's core work and this has resulted in them being unable to provide clear and definitive ratings of how successful CITB NI had been in meeting objectives.
- It is a positive finding that dealings with CITB NI has brought about a positive change to the approach of over half of stakeholders towards training and skills development. It would be more enlightening if there were some qualitative responses that could provide further information into why stakeholders felt this was, so that in future CITB NI is able to be more influential to a wider range of employers and stakeholders.
- When prompted, nearly all stakeholders said they would be likely to approach CITB NI for information, help or advice. However, just under a half have also used similar organisations in the past 12 months and the level of information, help or advice about skills provided by these other organisations is about on the same level as that provided by CITB NI. Therefore, stakeholders are not just engaging with CITB NI but some are looking to other organisations. Also, CITB NI are not seen as providing anything above and beyond what other organisations can provide.
- Stakeholders were much more likely than employers to have recommended CITB NI. Encouragingly, just under two thirds of stakeholders have actually recommended CITB NI to someone in the past 12 months. As with the employers research, word of mouth is very important within the industry and so maintaining or if possible improving on this level of recommendation among stakeholders is important.

Recommendations

- The main recommendation is that given the small sample size collected for CITB NI stakeholder research, there would be a benefit in collecting a greater proportion of qualitative responses. It is difficult to provide insight into some of the ratings given and thus understand how CITB NI can improve without the inclusion of open ended questions.
- If it was expected that a larger proportion of stakeholders would feel closer to or more engaged with CITB NI, it would be beneficial to probe the reasons why stakeholders do not consider themselves to be closely involved with CITB NI, if this is the case, in future surveys.

FRESH • CLEAR • BRIGHT • BOLD

