Headline Report

CITB NI Employer Research 2018 – NI Employers

Prepared for: Construction Industry Training Board NI

CITB NI Employer Research 2018 – NI Employers

Prepared for: Construction Industry Training Board NI

Prepared by: June Wiseman, Director and Emma Parry, Associate Director, BMG Research

Date: October 2018

Table of Contents

Table of Tables

1 Overview

The 2018 Employer Research was commissioned by CITB NI to examine skills issues in the construction industry within Northern Ireland and to understand how employers view the service provided by CITB NI.

This report shows headline findings from 103 interviews with employers in Northern Ireland. Where possible, comparisons are made to previous annual results from the Employer Research and Employer Tracker Survey (2014- 2017 and back to 2010 in one instance). Survey findings are unweighted.

Certain percentages used in this report may not add up to precisely 100% due to the impact of rounding.

2 NI Employers: Headline Results

2.1 Profile of NI employers interviewed

The tables below show the profile of the employers interviewed.

Table 2.1: Profile of employers interviewed in 2018 survey

Size	Interviews achieved	% of all interviews
Micro (2-9)	88	86
Small (10-49)	11	11
Medium (50-249)	2	2
Large (250+)	1	1
No levy return	0	0
Total	103	100

Grant Status	Interviews achieved	% of all interviews
Grant	16	16
Non-grant	87	84
Total	103	100

Levy status	Interviews achieved	% of all interviews
Levy payers	45	44
Non-levy payers	58	56
Blank	0	0
Total	103	100

2.2 General awareness and understanding

Employers were asked about the services they think CITB NI provides. Their responses are summarised in Table 2.2.

Table 2.2: Services that employers think CITB NI provides (spontaneous)

% of all	2018	2017
Other training courses	52	37
Health & safety information and training	36	17
Management training courses e.g. Leader in construction, site supervisors course, undergraduate development programme	12	4
Tier 1 grants to employers for training (i.e. obtained grant via the grants form or online grants system)	12	11
Offering apprenticeships	10	
Tier 3 specialist training courses e.g. scaffolding, mobile training unit, training in virtual environment (vet360)	8	11
Generic training advice e.g. Publications, phone, website, events	8	15
Generic grants	8	-
Recruiting apprentices	4	-
Annual return/levy	4	-
Standards and qualifications influencing and development	2	-
Business improvement seminars covering CITB NI products and services and relevant business topics	2	-
Conducting research into industry training needs	1	-
Promotion of careers in construction	1	7
Skills competitions (e.g. Skillbuild)	1	-
Tier 2 training delivered in partnership with industry bodies / federations that is supported by CITB NI funding	1	-
Don't know	20	-
None	20	-
Bases	103	100

Employers were then asked if they have used any services that CITB NI provides in the last 12 months. This is summarised in Table 2.3.

Table 2.3: CITB NI services that employers have used in the last 12 months (prompted)

% of all	2018	2017
Health & safety information and training	13	4
Other training courses	6	4
Management training courses e.g. Leader in construction, site supervisors course, undergraduate development programme	2	-
Tier 1 grants to employers for training (i.e. obtained grant via the grants form or online grants system)	2	5
Tier 3 specialist training courses e.g. scaffolding, mobile training unit, training in virtual environment (vet360)	1	2
Standards and qualifications influencing and development	0	-
Generic training advice e.g. Publications, phone, website, events	0	3
Conducting research into industry training needs	0	-
Promotion of careers in construction	0	-
Skills competitions (e.g. Skillbuild)	0	-
Tier 2 training delivered in partnership with industry bodies / federations that is supported by CITB NI funding	0	-
Delivery of projects where funding has been secured from external sources	0	-
Business improvement seminars covering CITB NI products and services and relevant business topics	0	-
Bases	103	100

Those that have used each product or service were asked how satisfied they were with it, rating it on a scale of 1 to 5, where 1 is completely dissatisfied and 5 is very satisfied.

Table 2.4: Employer satisfaction with CITB NI products and services used in the last 12 months

% of used	2018 % satisfied (score of 4, 5)	2017 % satisfied (score of 4, 5)
Management training courses e.g. Leader in construction, site supervisors course, undergraduate development programme	100 (2)	-
Tier 3 specialist training courses e.g. scaffolding, mobile training unit, training in virtual environment (vet360)	100 (1)	100 (2)
Tier 1 grants to employers for training (i.e. obtained grant via the grants form or online grants system)	100 (2)	80 (5)
Health & safety information and training	85 (13)	75 (4)
Other training courses	83 (6)	100 (4)

Bases in parentheses

Mean scores (which exclude 'don't knows' and should be used with caution) are shown in Table 2.5.

Table 2.5: Employer satisfaction with CITB NI products and services used in the last 12 months (mean score ratings)

Mean score rating (5-point scale), user of:	2018	2017
Other training courses	4.6	4.5
Tier 1 grants to employers for training (i.e. obtained grant via the grants form or online grants system)	4.5	4.2
Health & safety information and training	4.2	4.7
Management training courses e.g. Leader in construction, site supervisors course, undergraduate development programme	4.0	-
Tier 3 specialist training courses e.g. scaffolding, mobile training unit, training in virtual environment (vet360)	4.0	4.0

Those that have used each product or service were then asked how important the service that they have used was to their business. They were asked to rate it on a scale of 1 to 5, where 1 is completely unimportant and 5 is very important.

Table 2.6: Perceived importance of CITB NI products and services used in the last 12 months

% of used	2018 % important (score of 4, 5)	2017 % important (score of 4, 5)
Tier 1 grants to employers for training (i.e. obtained grant via the grants form or online grants system)	100 (2)	40 (5)
Health & safety information and training	77 (13)	50 (4)
Other training courses	67 (6)	25 (4)
Management training courses e.g. Leader in construction, site supervisors course, undergraduate development programme	50 (2)	-
Tier 3 specialist training courses e.g. scaffolding, mobile training unit, training in virtual environment (vet360)	0 (1)	50 (2)

Bases in parentheses

Mean scores (which exclude 'don't knows' and should be used with caution) are shown in Table 2.7.

Table 2.7: Perceived importance of CITB NI products and services used in the last 12 months (mean score ratings)

Mean score rating (5-point scale), user of:	2018	2017
Health & safety information and training	4.5	4.0
Tier 1 grants to employers for training (i.e. obtained grant via the grants form or online grants system)	4.5	3.2
Other training courses	4.2	3.0
Management training courses e.g. Leader in construction, site supervisors course, undergraduate development programme	4.0	-
Tier 3 specialist training courses e.g. scaffolding, mobile training unit, training in virtual environment (vet360)	3.0	3.0

2.3 Communications and marketing

Employers were asked if they have heard or seen anything about CITB NI over the last 12 months.

Table 2.8: Whether employers have heard or seen anything about CITB NI over the last 12 months

% of all	Bases	Yes	No
2018	103	57	43
2017	100	58	42

They were asked where they had seen or heard something about CITB NI.

Table 2.9: Where heard or seen something about CITB NI (spontaneous)

% of those that have heard or seen anything	2018	2017
Email	37	38
Via post/flyers/letters	26	9
Via a text message from CITB NI	13	17
Via internet / a website	5	1
Telephone call from CITB NI	5	4
Via local press	1	-
Events / seminars delivered by CITB NI	1	1
Other	3	-
Not seen or heard anything	30	44
Bases	103	100

Employers were asked if they have received any written correspondence by post or email from CITB NI in the last 12 months.

Table 2.10: Whether employers have received any written correspondence either by post or email from CITB NI in the last 12 months

% of all	Bases	Yes	No	Don't know
2018	103	86	11	3
2017	100	83	17	-

Those that have received written correspondence from CITB NI were asked to rate it on various aspects, on a scale of 1 to 5, where 1 is very poor and 5 is very good.

Table 2.11: Employer ratings of correspondence received

% received	2018 % good (score of 4, 5)	2017 % good (score of 4, 5)
Having a recognisable style and design	65	59
Being clear and easy to understand	65	72
Providing the right amount of information and detail	66	63
It explaining clearly how to get in contact with CITB NI / what to do next	75	72
And overall how would you rate CITB NI communications on products and services	58	64
Bases	89	83

Mean scores (which exclude 'don't knows' and should be used with caution) are shown in Table 2.12.

Table 2.12: Employer ratings of correspondence received (mean score ratings)

Mean score rating (5-point scale), user of:	2018	2017	2016[1]	2015[1]	2014[1]
Having a recognisable style and design	4.0	3.7	4.0	4.1	4.2
Being clear and easy to understand	3.9	3.8	4.0	4.2	4.1
Providing the right amount of information and detail	3.8	3.7	3.9	3.7	3.9
It explaining clearly how to get in contact with CITB NI / what to do next	4.2	4.0	4.0	4.1	4.4
And overall how would you rate CITB NI communications on products and services	3.6	3.6	4.0	4.1	4.1

[1] rating of CITB NI's communications (rather than correspondence)

Employers were asked if they have visited CITB NI's website in the last 12 months.

Table 2.13: Whether employers have visited CITB NI's website (citbni.org.uk) CITB NI in the last 12 months

% of all	Bases	Yes	No
2018	103	39	61
2017	100	36	64

Those that have visited CITB NI's website were asked to rate it on various aspects, on a scale of 1 to 5, where 1 is very poor and 5 is very good.

Table 2.14: Employer ratings of CITB NI's website

% received	2018 % good (score of 4, 5)	2017 % good (score of 4, 5)
Having the information you wanted	65	53
Having information that was clear	63	72
Navigation / how easy it was to find what you were looking for	68	66
Visual appeal	58	64
Having up-to-date content	63	71
Overall	63	67
Bases	40	36

Mean scores (which exclude 'don't knows' and should be used with caution) are shown in Table 2.12.

Table 2.15: Employer ratings of CITB NI's website (mean score ratings)

Mean score rating (5-point scale), user of:	2018	2017	2016	2015	2014
Having the information you wanted	3.7	3.5	4.2	3.9	4.0
Having information that was clear	3.6	3.7	4.3	4.0	4.0
Navigation / how easy it was to find what you were looking for	3.7	3.7	4.2	3.9	3.9
Visual appeal	3.8	3.8	4.2	3.7	3.7
Having up-to-date content	3.9	4.0	4.2	3.9	4.3
Overall	3.8	3.8	4.3	4.0	4.1

2.4 CITB NI levy and grant services

Employers were asked which of a list of CITB NI levy and grant services their organisation has used. These are summarised in the table below.

Table 2.16: Employer use of CITB NI levy and grant services

% of all	2018	2017
Online levy return facility	44	35
Online levy guidance notes	36	25
Grant scheme information	29	20
Online grant applications	21	15
BACS payments	24	9
Bases	103	100

Employers were asked about their level of satisfaction with each levy and grant service used.

Table 2.17: Employer satisfaction with CITB NI levy and grant services used in the last 12 months

% of used	2018 % satisfied (score of 4, 5)	2017 % satisfied (score of 4, 5)
Online levy return facility	84 (45)	74 (35)
Online levy guidance notes	84 (37)	88 (25)
Grant scheme information	77 (30)	75 (20)
Online grant applications	82 (22)	80 (15)
BACS payments	84 (25)	89 (9)

Bases in parentheses

2.5 Contacting CITB NI staff

Employers were asked if they have contacted CITB NI staff in the last 12 months.

Table 2.18: Whether employers have contacted CITB NI staff in the last 12 months

% of all	Bases	Yes	No	Don't know
2018	103	39	61	0
2017	100	29	67	4

They were then asked what they had contacted CITB NI about.

Table 2.19: Subject of the most recent query/contact

% of those contacted staff	
Levy	40
Booking a course/event	25
Grants	18
Other	15
Generic Training Advice	5
Standards and Qualifications	5
Apprenticeships	5
Audits	5
Specific Project	3
Bases	40

And then how they had most recently contacted CITB NI.

Table 2.20: Mode of the most recent query/contact

% of those contacted staff	
By phone	88
By email	13
Bases	40

Those who had contacted CITB NI were asked how helpful they thought the staff had been in relation to their most recent query.

Table 2.21: Helpfulness of response received to most recent query

% of those contacted staff	Bases	Not at all helpful	Not very helpful	Neither/nor	Fairly helpful	Very helpful	Don't know	Summary: helpful
2018	40	13	3	15	15	53	3	68
2017	29	10	0	7	17	66	-	83

2.6 Grants

Employers were asked if they were aware of each of the Tiers of the multi-tiered grants scheme provided by CITB NI.

Table 2.22:   Awareness of elements of the multi-tiered grants scheme

% of all	2018	2017
Tier 1 – grants to employers for a range of training at a fixed rate and claimed using a grants form or online form	46	46
Tier 2 - supporting training delivered in partnership with industry and claimed through the federation or association	36	37
Tier 3 – delivering specialist training courses available at a subsidised rate when booking e.g. MTU, scaffolding, UDP	41	50
Bases	103	100

Those aware of the different Tiers were asked if they had looked at information on each on the CITB NI website.

Table 2.23: Whether employers have looked at the information available to employers on the CITB NI Tiers within the Grants Scheme which is available on the website

% of all	Bases	2018	Bases	2017
Tier 1	47	34	46	24
Tier 2	37	35	37	19
Tier 3	42	31	50	18

Specifically, with regard to Tier 1, employers that had looked at information available on the website were asked if they had claimed a Tier 1 Grant as a result.

Table 2.24: Whether employers claimed a CITB NI Tier 1 Grant for training undertaken as a result of looking at information available on the website

% of those that have looked	Bases	Yes	No	Don't know
2018	47	30	68	2
2017	46	20	80	-

Those that had looked at information available on Tier 1 on the website but not claimed for the grant were asked why they had not done so.

Table 2.25: Reasons for not claiming a CITB NI Tier 1 Grant for any training

% of those not claiming	
Not appropriate for me	24
Did not undertake any training	18
Too time consuming	15
Not eligible/annual levy return form not submitted on time	9
Did not understand the information	6
Currently in the process	6
Did not think we were eligible	3
Too confusing/complicated	3
Other	30
Don't know	6
Bases	103

Employers that had looked for information on Tiers 2 and 3 on the website were asked if they were encouraged to contact CITB NI about these grants as a result.

Table 2.26: Whether employers were encouraged to contact CITB NI for more information after looking at the information on Tiers 2 and 3 on the website

% of those that have looked at each	Bases	2018	Bases	2017
Tier 2	13	23	19	57
Tier 3	13	23	18	56

They were then asked how they would be encouraged to apply for these grants.

Table 2.27: How employers feel they would be encouraged to make a Tier 2 or Tier 3 application

% of those that have looked at information	
If there was a need/requirement	29
If it was relevant to our field of work	21
Other	14
Nothing	14
Don't know	21
Bases	103

2.7 Employer views on the service CITB NI provides the industry as a whole

Employers were asked if they agree or disagree with a series of statements about CITB NI. They were asked if they strongly agree, tend to agree, neither agree nor disagree, tend to disagree or strongly disagree. Their responses are summarised in Table 2.28.

Table 2.28: Level of agreement with statements about CITB NI

% of all	2018 % agree (score of 4, 5)	2017 % agree (score of 4, 5)
CITB NI is seen as the hub for all training carried out by the construction sector	44	36
CITB NI is at the cutting edge of training needs within the industry in Northern Ireland	37	38
CITB NI delivers the highest quality in all its endeavours	38	51
CITB NI is more commercially minded and identifies ways to develop income streams other than levy	34	38
CITB NI builds strong strategic partnerships to develop and enhance its activities	35	39
Bases	103	100

Mean scores (which exclude 'don't knows' and should be used with caution) are shown in Table 2.29.

Table 2.29: Employer satisfaction with CITB products and services used in the last 12 months (mean score ratings)

Mean score rating (5-point scale), all that provided a response:	2018	2017
CITB NI is seen as the hub for all training carried out by the construction sector	3.1	3.1
CITB NI is at the cutting edge of training needs within the industry in Northern Ireland	2.9	3.0
CITB NI delivers the highest quality in all its endeavours	3.0	3.3
CITB NI is more commercially minded and identifies ways to develop income streams other than levy	3.0	3.1
CITB NI builds strong strategic partnerships to develop and enhance its activities	3.0	3.1

Bases in parentheses

Table 2.30 shows the employer satisfaction with the service CITB NI provides the industry as a whole. Again, employers were asked to rate on a scale of one to five (one being completely dissatisfied and five being completely satisfied).

Table 2.30: Employer satisfaction with the service CITB NI provides for the industry as a whole

Satisfaction rating	2018 %	2017 %	2016 %	2015 %
Completely satisfied	22	20	25	25
Satisfied	19	20	56	43
Neither satisfied nor dissatisfied	18	29	10	20
Dissatisfied	12	13	5	8
Completely dissatisfied	23	19	4	4
Don't know	6	-	-	-
Bases	103	100	100	100
Mean score	3.1	3.1	3.9	3.8

Employers who are dissatisfied with the service CITB NI provides for the industry as a whole were asked why they are dissatisfied.

Table 2.31: Reasons for dissatisfaction with the overall service CITB NI provides for the industry as a whole

% of those not satisfied	
Not cost effective for the levy paid/too expensive	33
Lack of support for small businesses/too much emphasis on larger companies	25
Lack of relevance/shouldn't have to pay the levy	25
They offer no benefit/help/support	22
Only interested in levy collection	22
Lack of communication	14
Haven't needed their services	14
Other	6
Bases	36

2.8 Employer views on their interactions with CITB NI in the last 12 months

Employers were asked about their level of satisfaction with aspects of CITB NI's performance during their interactions with CITB NI in the last 12 months.

Table 2.32: Employer satisfaction with their interactions with CITB NI and CITB NI's performance in the last 12 months

% of all	2018 % satisfied (score of 4, 5)	2017 % satisfied (score of 4, 5)
Being knowledgeable, and providing expertise and reliable information	39	44
Being fair and accessible in meeting the needs of a wide range of customers	39	45
Listening to customers and reflecting this in their products and services	34	39
Bases	103	100

Mean scores (which exclude 'don't knows' and should be used with caution) are shown in Table 2.33.

Table 2.33: Employer satisfaction with their interactions with CITB NI and CITB NI's performance in the last 12 months (mean score ratings)

Mean score rating (5-point scale), all that provided a response:	2018	2017	2016	2015	2014
Being knowledgeable, and providing expertise and reliable information	3.2	3.1	4.2	4.1	4.1
Being fair and accessible in meeting the needs of a wide range of customers	3.2	3.1	4.2	4.0	4.1
Listening to customers and reflecting this in their products and services	3.1	3.1	4.1	3.9	3.9

Table 2.34 shows the employer satisfaction with the service CITB NI provides their company in the last 12 months. Again, employers were asked to rate on a scale of one to five (one being completely dissatisfied and five being completely satisfied).

Table 2.34: Employer satisfaction with the service CITB NI provides for their company

Satisfaction rating	2018 %	2017 %	2016 %	2015 %
Completely satisfied	17	25	42	23
Satisfied	17	23	37	40
Neither satisfied nor dissatisfied	17	20	12	17
Dissatisfied	7	6	8	11
Completely dissatisfied	28	25	1	9
Don't know	14	-	-	-
Bases	103	100	100	100
Mean score	2.9	3.2	4.1	3.5

Employers who are dissatisfied with the service CITB NI provides for their company were asked why they are dissatisfied

Table 2.35: Reasons for dissatisfaction with the overall service CITB NI provides for their company

% of those not satisfied	
Lack of relevance/shouldn't have to pay the levy	28
They offer no benefit/help/support	22
Lack of communication	22
Haven't needed their services	19
Other	17
Lack of support for small businesses/too much emphasis on larger companies	11
Not cost effective for the levy paid/too expensive	8
Only interested in levy collection	6
Bases	36

2.9 Support for the levy

Employers were asked how important they feel the levy and range of services including the grant system is in maintaining the level and quality of training within their own firm and across the construction industry as a whole.

Table 2.36: Importance of levy and grant system...

Importance rating	...within their firm		...across the industry	
	2018 %	2017 %	2018 %	2017 %
Very important	24	15	30	33
Quite important	17	22	19	21
Neither important nor unimportant	15	15	19	26
Unimportant	8	14	4	8
Completely unimportant	33	35	17	13
Don't know	4	-	10	-

They were asked about the impact they thought there would be on the industry as a whole if there were no statutory training body such as the CITB NI to collect levies and pay grants for training.

Table 2.37: Perceived impact on specified issues if there were no statutory training body such as CITB NI to collect levy and pay grants for training

% of all		Improve	Worsen	Remain the same	Don't know
Training within the industry	2018	11	41	44	5
	2017	14	27		
	2016	0	73		
	2015	2	56		
	2014	5	75		
Image and recruitment of new staff	2018	5	28	57	10
	2017	7	20		
	2016	0	71		
	2015	1	42		
	2014	4	54		
Progress towards a qualified workforce	2018	6	35	53	6
	2017	19	23		
	2016	0	73		
	2015	4	56		
	2014	6	68		
Availability of skilled labour	2018	8	34	53	5
	2017	14	24		
	2016	0	71		
	2015	0	48		
	2014	7	59		

Employers were asked if they thought statutory levy and CITB NI's provision of services and grants should continue.

Table 2.38: Whether employers think that the statutory levy and CITB NI's provision of services and grants should continue

% of all	Bases	Yes	No	Don't know
2018	103	57	38	5
2017	100	51		
2016	100	72		
2015	100	56		
2014	100	80		
2013	100	74		
2012	100	68		
2011	100	71		
2010	100	69		

Those that do not think that the statutory levy and CITB NI's provision of services and grants should continue were asked to give their reasons why.

Table 2.39: Reasons for not thinking that the statutory levy and CITB NI's provision of services and grants should not continue

% of those that think it should not continue	
It's an unnecessary expense/additional tax	64
It has no real benefit for us	64
They don't provide the training/staff that our industry needs	36
It favours larger companies	13
It's better to train in-house/on-site	8
The system is inconsistent	5
Other	18
Don't know	3
Bases	39

With more than 25 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the public and the private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most up to date technologies and information systems to ensure that market and customer intelligence is widely shared.