Skills and Training in the Construction Sector 2008

Research Report

prepared for

ConstructionSkills

by

IFF Research Ltd

December 2008

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1 Introduction

1.1 ConstructionSkills was established as a Sector Skills Council in September 2003, bringing together the Construction Industry Training Board (CITB), CITB Northern Ireland and the Construction Industry Council (CIC).

1.2 One of the overriding aims of ConstructionSkills is to ensure that the training and learning infrastructure across the UK reflects the needs of the industry in terms of quantity, quality and location of training, mode of learning and funding mechanisms. This requires that ConstructionSkills has a thorough understanding of the needs and practices of the industry relating to skills, learning and training.

1.3 Currently there is an abundance of research surveys on employer skill needs but none which provides data representative of the whole construction industry. Some surveys are too specific in their coverage (for example covering only specific federations) while others are too generic or do not cover the self-employed. The National Employers Skills Survey, for example, last commissioned by the LSC, DfES and SSDA in 2007, covers just England and only establishments with 2 or more staff.

1.4 To fill this information gap, ConstructionSkills commissioned IFF Research to undertake a survey to provide a single source of evidence, representative of the traditional building sector across Great Britain, examining current issues regarding skills and training within the construction industry. The study included just the traditional building sector covered by the 2003 Standard Industrial Coding (SIC) 45, and excluded Professional Services firms (covered by SIC 74.2, such as architects and surveyors) even though these are within ConstructionSkills' footprint.

1.5 The objectives of the study were to identify, quantify and analyse:

- Recruitment difficulties and skill shortages in the job market, looking at their prevalence, nature, causes and impact
- Skill deficiencies and skill gaps within the existing workforce, again looking at their prevalence, nature, causes and impact
- Training activity, including the type of training being used, and the recruitment of Apprentices
- Employer commitment to and involvement in workforce training and development, covering awareness and use of government programmes, and reasons for training or not training

Methodology

1.6 The study covered the traditional building sector (sector 45 within the Standard Industrial Classification (SIC) codes) in Great Britain, and involved a total of 1,125 interviews consisting of:

- 975 interviews with employers (those with two or more employees on the payroll at the location)
- 150 interviews with sole traders / the self-employed (those with a single person on the payroll, though they could have self-employed or agency staff working for them.

1.7 All interviews were undertaken by telephone using Computer Assisted Telephone Interviewing (CATI) from IFF's telephone centre in London. Fieldwork took place from 25th April to 28th May 2008. The main fieldwork was preceded by a small scale pilot for which 27 interviews were conducted from 16th to 18th April and which resulted in a number of refinements to the questionnaire.

1.8 The sample was sourced from Experian's Business Database, supplemented for the self-employed group by those from ConstructionSkills' Employer Attitudes to Learning and Training panel research who were willing to take part in further research.

1.9 For employers quotas were set by country (though not English region), size (number of staff on the payroll at the site) and by sub-sector (SIC 45.1 – demolition; 45.2 – construction of building and construction projects; 45.3 – building installation 45.4 – floor and wall coverings; 45.5 – renting of construction equipment with operator).

1.10 By size the aim was to over represent large employers because of their importance in terms of employment, thereby allowing reliable reporting of results among large employers. Without this oversampling very few interviews would have been conducted with large employers because they represent a small proportion of the total employer population. Weighting of the data then ensured that they were represented in their correct proportions in the final results.

1.11 For sole traders a target of 150 interviews was set with no specific country or sub-sector quotas.

1.12 The weighting of the survey data was done separately for sole traders / the self-employed and for employers. For the self-employed the results were grossed up to the estimate of the total number of self-employed in the industry using Labour Force Survey (LFS) quarterly data, based on data averaged over four quarters (Spring 2007, Winter 2007, Autumn 2006 and Summer 2006) producing a total of c. 830,000 self-employed workers. This is clearly a large upweight from the 150 interviews and results showing volume estimates among this group (the *number* with skills gaps, the number of self-employed trained in the last 12 months etc) need to be treated with caution. For employers, the results were grossed up to the number of employers in the industry (based on March 2007 data from the Inter Departmental Business Register (IDBR)) on a size by region weighting matrix. This was done separately for units and employees (the latter used for volume estimates, i.e. the number of staff with skill gaps, the number of staff being trained etc).

2 Management Summary

2.1 This report summarises the findings of a survey of 975 construction sector employers and 150 sole traders / self-employed in Great Britain interviewed in May 2008. The survey investigated issues regarding the extent and nature of recruitment difficulties and the extent to which these are caused by skills shortages, the extent and nature of skill gaps among the existing workforce, and training activity.

Recruitment, recruitment difficulties and skill-shortage vacancies

2.2 Approaching half of employers (45%) indicated that there had been times in the previous 12 months where they lacked the number of skilled workers they required, and overall 12% felt for *all or most* of this time they did not have enough skilled workers for the work they had or could have had. Among these employers, just over half reported having to turn work down as a result (53%) and two thirds had been forced to sub-contract work (65%). Clearly skills shortages in the labour market are both quite prevalent and quite impactful.

2.3 A majority of employers (58%) had *attempted* to recruit skilled staff in the last 12 months. This increases with size of employer from just over half among those with 2-9 staff on the payroll, to three quarters where 10-24 are employed to approaching nine in ten among those with 100 or more staff (84%). Among the self-employed a fifth had attempted to recruit skilled staff in the previous 12 months.

2.4 Half the employers trying to recruit skilled staff over the last 12 months reported some of these vacancies as being hard-to-fill (50%). This is equivalent to almost three in ten of all employers having recruitment difficulties for skilled staff over the past 12 months (29%).

2.5 Employers with hard-to-fill vacancies were most likely to experience these for carpenters / joiners (16% of employers with hard-to-fill vacancies, equivalent to 5% of all employers, had experienced difficulties recruiting in this occupation in the last 12 months), construction operatives (experienced 12% of those with hard-to-fill vacancies) and labourers / general operatives (experienced by 11% of those with hard-to-fill vacancies). Following this, there was a long list of occupations where employers were experiencing recruitment difficulties to a similar degree, including managers, welders/fabricators, plant machine operators, technical staff, electricians and bricklayers (each mentioned by 6% - 9% of those with hard-to-fill vacancies over the previous 12 months).

2.6 In many cases the skills lacking among applicants are very occupation specific, and in other cases the 'skill' is more about personal attitudes and commitment (28% of employers with hard-to-fill vacancies over the last 12 months for skilled positions had experienced candidates with poor attitudes), or a lack of experience (20%). Among broader generic skills mentioned were a lack of literacy / numeracy (4%), management or supervisory skills (1%), a lack of IT skills (1%) and a lack of social / people skills (1%).

2.7 Where recruitment difficulties are experienced for skilled staff they have a significant impact: three-fifths of these employers have had to increase the use of overtime and the workload on staff, and half say it has increased operating costs and / or that they have lost business or not bid for work as a result. Nine in ten of those experiencing recruitment difficulties felt some negative impacts had resulted.

2.8 Most employers experiencing recruitment difficulties had taken some steps to try and overcome them (75%). This is most often trying new recruitment methods or channels (29%) or increasing recruitment advertising spend (19%), or increasing trainee programmes (19%) or increasing training and skills for existing staff (14%).

Skill gaps

2.9 Overall around one in six employers (17%) have staff lacking proficiency and one in seven of the self-employed (14%) regard themselves as having a skills gaps. The larger the employer the more likely they are to have any skills gaps (45% of those with 100 or more staff have staff lacking proficiency) though this in part just reflects the fact that they have more employees that can lack skills.

2.10 Results varied relatively little by country / region. Employers in the South West were more likely than average to report having staff lacking proficiency (26%) and those in the South East were the least likely (12%). In all other countries / regions it was in the 14% to 19% range.

2.11 Overall employers describe some 74,000 employees as not fully proficient, equivalent to 6% of the directly employed workforce. Among the self-employed 15% felt they were not fully proficient and that there were skills they felt they needed to develop and improve. This is equivalent to some 126,000 self-employed lacking skills. Hence the survey results suggest that there are more self-employed believing that they have skill gaps than there are directly employed workers described by their employers as lacking proficiency.

2.12 Among employers, both in numeric (volume) terms and as a percentage of the workforce, skill gaps are more prevalent in large firms. Within establishments with 100 or more direct employees, 8% of staff are described as lacking proficiency, twice the proportion found among micro firms with 2-9 direct employees.

2.13 Employers in London reported the highest proportion of their workforce as having a skills gap (14%). By contrast only 3% to 4% of direct employees in the South East, North West, Yorkshire and Humberside and Wales were described as not being fully proficient.

2.14 The largest volume of skills gaps was reported for labourers and general operatives, and one in ten of this occupation were described as not being fully proficient. Carpenters / joiners had the next highest volume of skills gaps (around 9,500) and one in eight were described as lacking proficiency. Following these a number of occupational areas had a broadly similar number of staff lacking proficiency (in the 4,500 – 6,000 range): managers, scaffolders, admin, technical staff and painters / decorators. However results varied widely in the likelihood of these staff being reported as lacking skills: it was low for managers (3%), admin staff (3%), and relatively high for scaffolders (13% were described as lacking full proficiency).

2.15 By far and away the most common cause of skills gaps is staff lacking experience or having been recently taken on, a factor felt to contribute to skills gaps for around three quarters of employers with skills gaps (78%). The encouraging aspect of this is that these skill gaps could be expected to be relatively short term, easing as these employees gain experience and get to understand that company's way of operating. Three causes were mentioned by around a fifth of those with skills gaps: staff lacking motivation (22%), a lack of opportunity to train and develop staff (22%) and recruitment difficulties (19%, suggesting that not being able to recruit skilled staff means existing workers have to work in roles they are not ideally suited for).

2.16 Although a minority of employers say they have staff lacking proficiency, where skill gaps exist they have serious impacts for these companies. Around half of employers with skill gaps experienced negative consequences, most often increased operating costs (35%) and increased workload and use of overtime (34%), while some had turned business away as a result of their staff lacking proficiency (13%) or been late delivering projects (17%).

Training and workforce development

2.17 Overall, three-fifths of employers (59%) and around one in six (17%) sole traders / the self-employed had funded or arranged training or development for staff in the previous 12 months.

2.18 By far and away the most common reason for not training, mentioned by almost two thirds of these employers, is a belief that all staff are fully proficient. Supply-side issues (the required courses not being available locally, the quality of local courses or providers being unsatisfactory, the start dates or times of courses being inconvenient, and courses being too expensive) were mentioned by 7% of non-trainers, hence it is a contributory but not the critical reason for not training.

2.19 Employers reported providing training over the previous 12 months for approximately 605,500 direct and self-employed / indirect staff. This is equivalent to a third (34%) of the total current construction sector workforce (i.e. covering direct and indirect labour), and to half (51%) of the current directly employed workforce.

2.20 In absolute terms, more managers and labourers / general operatives have received off-the-job and on-the-job training in the last 12 months than any other occupational group. However, this reflects the high number employed in these occupations, and a higher proportion of construction operatives bricklayers, roofers and electricians received off-the-job training, while the proportion provided with on-the-job training is particularly high for bricklayers, carpenters / joiners, floorers and scaffolders. Chapter 7 discusses the occupational profile of off- and on-the-job training in some detail.

2.21 Establishments providing off-the-job training had funded or arranged an average of 10 days of such training per person trained off-the-job in the past 12 months, while establishments providing on-the-job training have arranged an average of 21 days of on-the-job training per on-job trainee. The latter figure is heavily influenced by employers saying they gave more than 40 days on-the-job training per recipient over the last 12 month – if these employers are excluded the figure drops to 7 days of on-the-job training per recipient.

2.22 Almost one in five establishments providing on-the-job training had provided *only* health and safety or induction training, and the same applies to a quarter of establishments providing off-the-job training. For both types of training more than half of employers indicated that most of their training was for health and safety and or induction.

2.23 A slight minority of employers that train (43%) indicate that any of their training was intended to lead to a qualification. This is much higher among medium and large employers. Results suggest that employers had had approaching 260,000 staff on training over the last 12 months that was intended to lead to a qualification, equivalent to 42% of the total number of workers trained in this period, and 15% of the total current workforce. The vast majority of employers training staff to a qualification (71%) said staff had been studying towards NVQs or SVQs.

2.24 Approaching half (45%) of employers that trained over the last 12 months would like to have provided more training than they actually arranged. The main barriers are not being able to spare staff the time off for training and a lack of funds or training being regarded as expensive. Supply-side issues are relatively rarely mentioned.

2.25 Around nine in ten employers are aware of NVQs / SVQs, and just over three-quarters had heard of CSCS. The majority of employers are also aware of the NCC (61%) and the Site Management Safety Training Scheme (SMSTS - 60%). Fewer than half of employers in England and Wales were aware of Train to Gain (48%), and 10% of all employers in England and Wales had been involved with the service in the last 12 months.

Young people and Apprentices

2.26 Almost one in five employers (19%) had taken on a young person to their first job on leaving school or college in the previous 12 months. A majority of these employers think the recruits were well prepared for work (58%), but almost two in five (37%) think they were poorly prepared, indeed one in eight (12%) described the young people they have taken on as very poorly prepared.

2.27 Poor attitude and a lack of basic education (including poor numeracy and literacy) were the most common criticisms made by those thinking young recruits straight from education were poorly prepared (42% and 34% respectively), though others think these recruits should have had better basic practical skills (26%), that they lacked life experience (20%), or had poor communications skills (18%).

2.28 Just over a fifth (22%) of all employers say they offer Apprenticeships, rising to just over seven in ten (71%) among establishments with 100 or more staff. Not all these had current Apprentices: overall 11% of all employers had recruited a young person aged 16-24 to start an Apprenticeship in the last 12 months, rising to 55% among establishments with 100 or more direct employees. Employers in Scotland and the North East were more likely than average to have recruited Apprentices aged 16-24 (21% and 16% respectively).

2.29 It was particularly noticeable that employers reporting skill gaps in their workforce were far more likely than others to have recruited Apprentices (24% v. 8% respectively), suggesting recruitment of Apprentices is often a way to meet skill shortages within the workforce.

2.30 Small establishments with 2-9 staff appear to shoulder more of the responsibility for the recruitment of Apprentices than large firms. The survey results suggest that establishments those with fewer than 10 (direct or indirect) staff account for 18% of all employment yet take on 26% of Apprentices, while those with 100 or more staff account for 34% of employment but only 25% of the Apprentices recruited.

2.31 Reasons for not offering Apprenticeships vary. Many responses point to them not being felt to be relevant, at least in their current circumstances, for example because they have a fully qualified workforce, they are too small, they are not looking to recruit or staff in their organisation do not have to be qualified. Some of these responses imply that if circumstances changed they might be willing to consider Apprentices. A small number also suggest potential interest but say Apprenticeships do not exist for their particular specialism within Construction (7%). Others, however, appear not to like the idea of taking on Apprentice, for example preferring to take on qualified staff (6%) or older workers (4%).

3 The profile of those interviewed

3.1 In this section we briefly discuss the profile of the 975 employers and the 150 sole traders / self-employed interviewed. This is background information to show both the number of interviews on which results among sub-groups are based, and that the sample is broadly representative of the sector.

3.2 By size, most establishments employ fewer than 10 direct employees (83%), and fewer than 10 staff in total including self-employed / other indirect labour (67%).

Sample profile by size (employers)		
	Number of interviews	**Proportion weighted**
Number directly employed at the establishment		
2-9	440	83%
10-24	214	10%
25-99	183	5%
100-199	92	1%
200+	46	<0.5%
Total employed at the establishment (direct and indirect / self-employed)		
2-9	356	67%
10-24	251	21%
25-99	211	10%
100-199	97	2%
200+	60	1%

3.3 While large establishments with 100 or more staff account for a small proportion of the business population, they account for a significant proportion of employment. Those with 100 or more staff employ three in ten of all direct employees (29%), almost the same proportion as employed by small establishments with fewer than 10 direct employees (30%).

3.4 By sub-sector, building of complete structures (SIC 45.2) and building installation (SIC 45.3) account for over three-quarters of establishments (77%) and a similar proportion of total direct employment (76%).

Sample profile by sub-sector (employers)			
	Number of interviews	**Proportion of establishments weighted**	**Proportion of direct employment weighted**
Earth moving / demolition (SIC 45.1)	32	3%	3%
Building complete structures (SIC 45.2)	445	39%	52%
Building installation (SIC 45.3)	286	38%	24%
Building completion (SIC 45.4)	160	15%	17%
Renting of machinery with operator (SIC 45.5)	52	5%	4%

3.5 The following table shows the number of interviews by country, and the proportion of GB establishments and direct employment falling within each once the results were weighted.

Sample profile by country (employers)			
	Number of interviews	**Proportion of establishments weighted**	**Proportion of direct employment weighted**
England	823	87%	85%
Scotland	93	8%	10%
Wales	59	5%	5%

3.6 We occasionally report results by English region in the report. Base sizes are relatively low and some caution is needed: the number of interviews conducted ranged from 52 in London and 54 in the North East up to 120 interviews in the East of England and in the South East.

Sole traders / the self-employed

3.7 A total of 150 interviews were conducted with sole traders where only one direct employee (i.e. the respondent) was employed. Around a quarter (28%) had self-employed or other indirect labour working for them at the time of the interview. In the report we do not break the self-employed down by area of activity, occupation or region, nor did the weighting process attempt to make the sample representative on these criteria (the base sizes are too small to allow this). However it is worth noting that a wide range of occupations were interviewed, with the most common classifications being owner / managers (17%), painters / decorators (13%), multi-skilled tradesmen (12%), carpenters / joiners (9%), bricklayers (8%), roofers (7%), floorers (4%) and plasterers (4%).

4 Output Constraints

4.1 Employers were asked what factors were limiting their business at the time of the interview (the vast majority of the fieldwork was conducted in May 2008), and then which were likely to limit their sales and output over the following 12 months. Results on these unprompted questions are shown on the following table.

Limiting factors on the business (employers)		
	Current	Over the next 12 months
Base: all employers (975)	%	%
Insufficient demand / uncertainty in the economy	19	40
Labour shortages	8	8
Lack of finance (i.e. cash-flow, working capital, late payments)	6	6
High level of competition	4	3
Training issues – shortage of staff with the right skills/qualifications	3	4
High / rising costs	3	5
Legislation / bureaucracy / red tape	2	2
Shortages of materials / equipment	1	2
Other	4	5
Nothing	52	29
Don't know	3	6

4.2 Around half of employers felt at the time of the interview there were factors limiting their business. This was most commonly insufficient demand or uncertainty in the economy (19%), labour shortages (8%) or issues to do with finance and cash flow (6%). Overall 11% mentioned labour shortages, shortages of skilled labour or training issues.

4.3 Results varied relatively little by size of company, other than large companies with 100 or more staff being twice as likely as average to be constrained by labour shortages (16%). There are some indications (though on a relatively low base of 59 respondents, hence some caution is needed) that among employers in Wales there were particular concerns about low levels of demand (31%) and employers in Wales were less likely than average to feel there were no current limits on their business (26%).

4.4 Many more employers anticipated constraining factors on their business for the coming 12 months, and only three in ten employers (29%) felt there would be none. By far and away the most common anticipated limiting factor for the 12 months following the interview was felt to be low demand and uncertainty with the economy, mentioned by two in five employers overall (40%) and almost half (47%) of large firms employing 100 or more staff (directly or as labour-only sub-contractors). One in twelve (8%) anticipated that labour shortages would affect their business. This was higher among employers in the South East and in Yorkshire and the Humberside (15% and 14% respectively).

4.5 Results among the self-employed are broadly similar to employers. Like employers, a slight majority felt that there were no current constraints on their business (55%), and the most common constraint was insufficient demand and uncertainty in the economy (18%). Legislation and red tape was a constraint for 7% of the self-employed (higher than found among employers), and a similar proportion mentioned labour shortages (6%) and a lack of skilled labour (6%).

4.6 Just over half of the self-employed expected constraints limiting their business in the period covering late 2008 / early 2009. This was most commonly insufficient demand or uncertainty in the economy (32%). Following this a range of factors were mentioned though each by relatively few (3% - 5%): dealing with legislation / red tape, lack of finance, labour shortages, high levels of competition, rising costs, and time issues. Some also pointed out that they were not looking to increase the amount of work they were doing for example because they were looking to retire or for medical reasons (4%).

5 Recruitment and recruitment difficulties

5.1 In this chapter we examine the extent to which employers and the self-employed have tried to recruit skilled staff over the previous 12 months, and the extent and nature of recruitment difficulties that have been encountered. We also examine the causes and impact of hard-to-fill vacancies, and the steps if any that employers have taken to try and overcome any recruitment difficulties.

Recruitment activity over the last 12 months

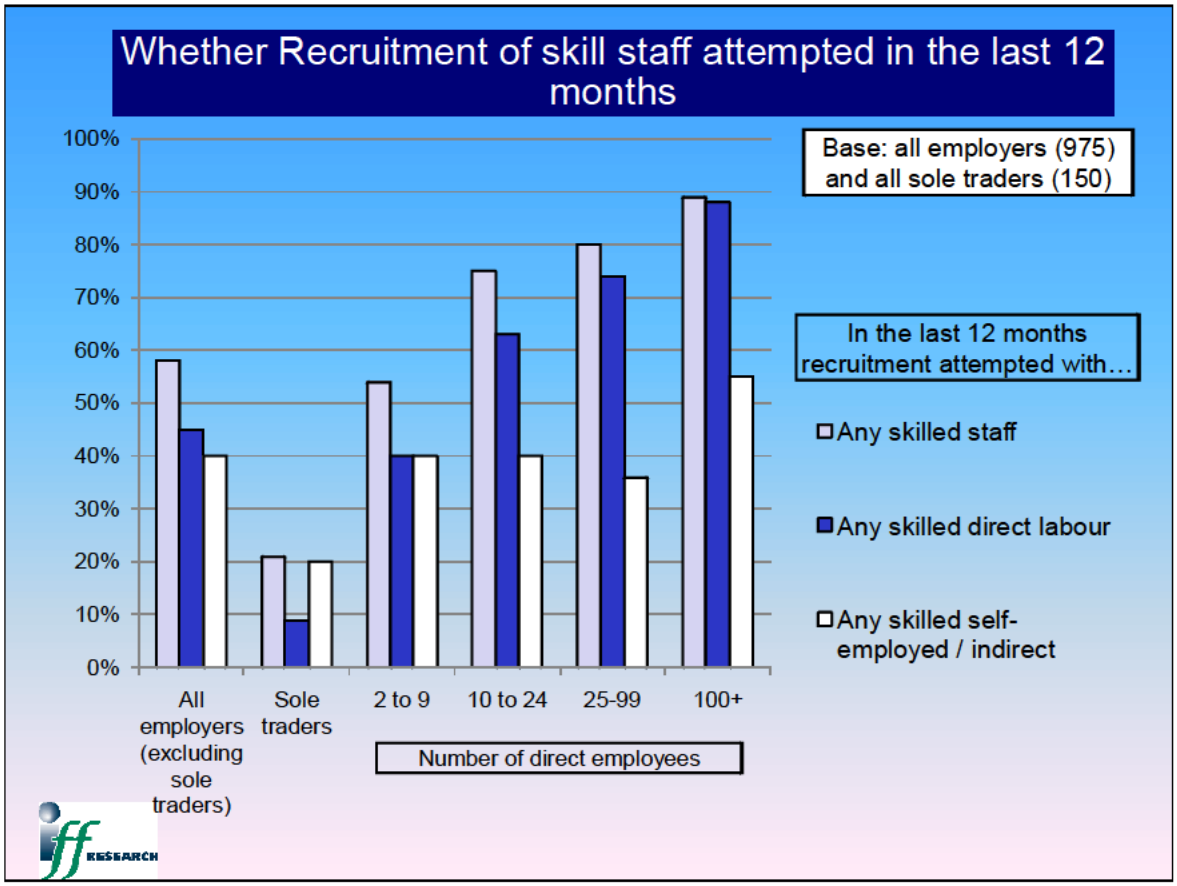
5.2 To understand the context of recruitment activity employers were asked whether over the last 12 months they had had shortages of skilled workers. Approaching half (45%) indicated that there had been times in the previous 12 months where they lacked the number of skilled workers they required, and overall 12% felt for *all or most* of this time they did not have enough skilled workers for the work they had or could have had. Those based in Wales were particularly likely to report this level of shortages (i.e. shortages for all or most of the last 12 months - 23%). Differences by size were relatively slight: 11% of establishments with 2-9 staff had not had enough skilled staff for all or most of the previous 12 months, compared with 15% among those with 100 or more direct employees.

5.3 While 45% of employers experienced times in the previous 12 months where they lacked the number of skilled workers they required, 15% indicated that for most of the last 12 months they have not had sufficient work for their staff. This leaves two in five (40%) indicating that the number and skill levels of staff over the last 12 months have been about right.

5.4 The implications of having a lack of skilled workers appear to be quite severe. Among these employers, just over half reported having to turn work down as a result (53%) and two thirds had been forced to sub-contract (65%). A total of 28 self-employed respondents were interviewed who reported a lack of skilled workers or trying to recruit skilled staff in the last 12 months (a low base so caution is needed) but a similar level of impact was recorded: two thirds reported having to sub-contract work and three-fifths had been forced to turn work down.

5.5 A majority of employers (58%) had *attempted* to recruit skilled staff in the last 12 months. This increases with size of employer from just over half among employers with 2-9 staff on the payroll, to three quarters where 10-24 are employed to approaching nine in ten among those with 100 or more staff (84%). Among the self-employed a fifth had attempted to recruit skilled staff in the previous 12 months.

5.6 Results are summarised in the following chart. For each size of employer, and for the self-employed, we show three bars - from left to right the proportion attempting to recruit in the last 12 months: any skilled staff; any skilled direct employees; and then any skilled self-employed staff.



5.7 It was noticeable that employers reporting skill gaps among their workforce (the issue of skill gaps is discussed in chapter 6) were much more likely to have attempted to recruit experienced, skilled staff in the last 12 months: 73% had done so compared with 55% of employers with no skill gaps.

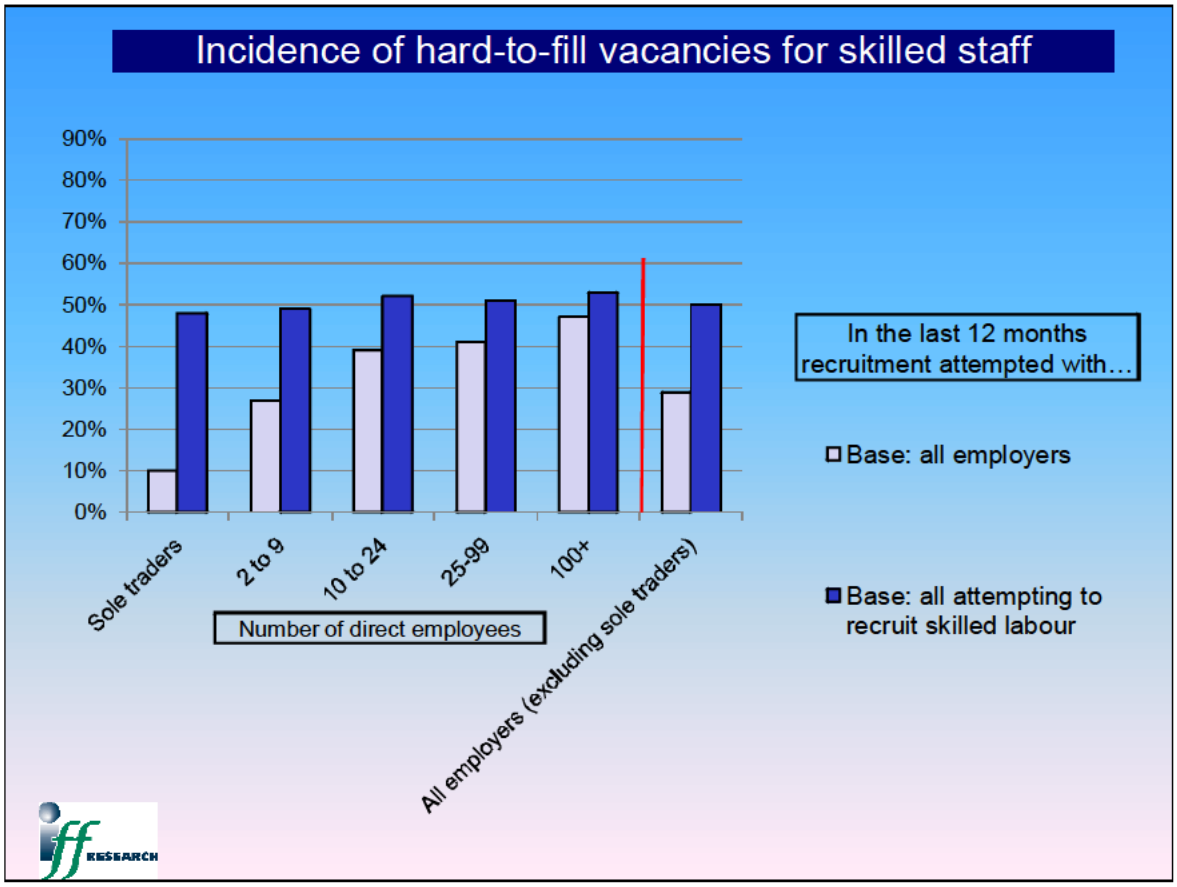
5.8 Base sizes are relatively low by region / country (c 100 respondents in each case), hence some caution is needed, but in the East of England (68%), the South East (66%) and Scotland (65%) a higher than average proportion of employers had attempted to recruit skilled staff.

5.9 Where sole traders / the self-employed have sought to recruit skilled labour, the preference appears to be heavily towards taking on workers on a self-employed basis. Among those with 2-9 staff as many had sought to recruit skilled direct employees as had looked to recruit self-employed / indirect labour; but among larger firms many more had tried to recruit experienced employees than had attempted to take on experienced self-employed workers.

Recruitment difficulties / hard-to-fill vacancies

5.10 Half of those employers trying to recruit skilled staff over the last 12 months reported some of these vacancies as being hard-to-fill (50%). This is equivalent to almost three in ten of all employers having recruitment difficulties for skilled staff (29%).

5.11 Results are summarised on the following chart. The left hand bar of each pair shows the proportion of all employers / all self-employed reporting hard-to-fill vacancies for skilled staff, while the right hand bars show the proportion of those attempting to recruit skilled staff that report hard-to-fill vacancies for such staff over the last 12 months.

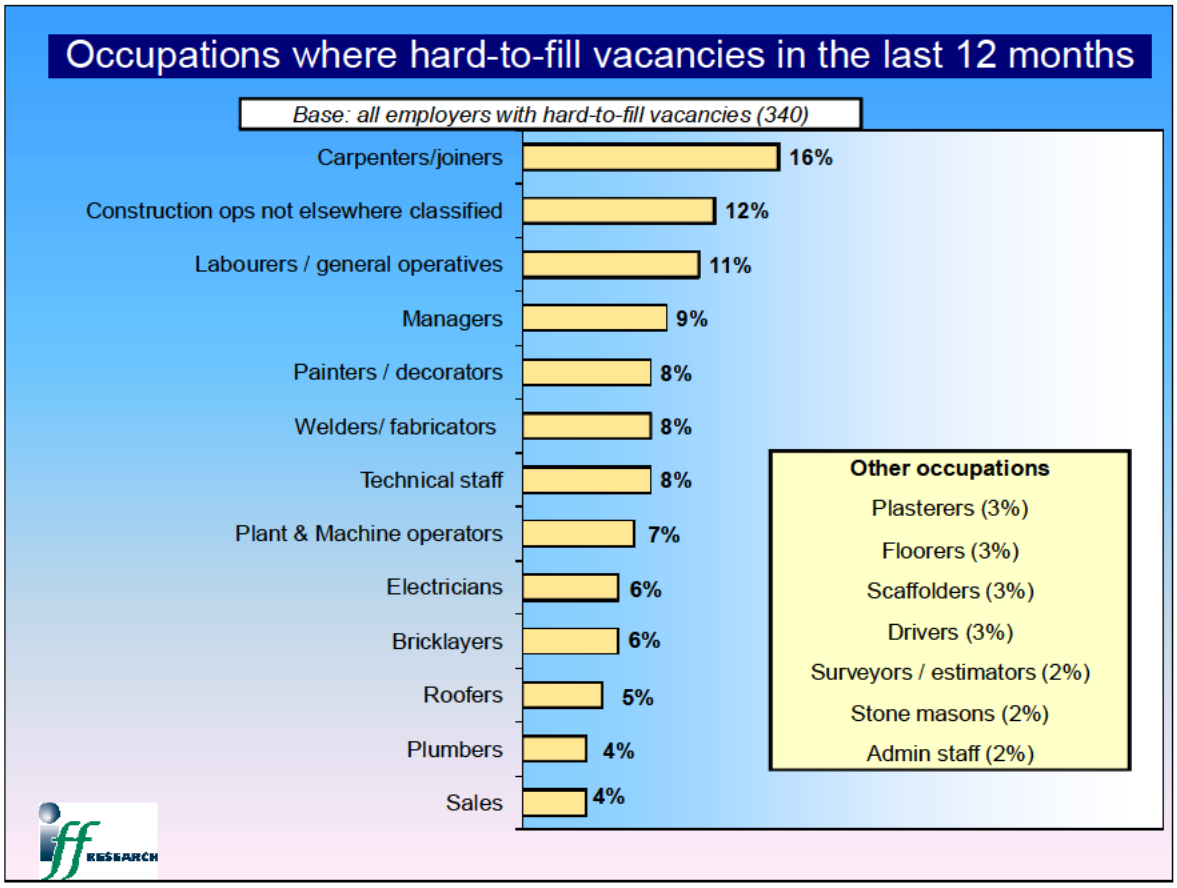


5.12 Large employers with 100 or more direct employees are more likely than average to report having had recruitment difficulties when looking to recruit skilled staff over the last 12 months (47%). However, this simply reflects that they are more likely to have tried to recruit skilled staff. In fact the proportion of those attempting to recruit experienced staff that encountered difficulties varies very little by size of firm, as shown by the flat level of the right hand bars in the previous chart.

5.13 Employers in Scotland were more likely than average to report any recruitment difficulties (40% v the G.B. average of 29%), and three-fifths of those trying to recruit skilled staff in Scotland reported difficulties (61%, it was at a similar level in the West Midlands).

Occupations with hard-to-fill vacancies

5.14 We have seen that around three in ten employers (29%) and one in ten (10%) of the self-employed experienced recruitment difficulties for skilled staff over the last 12 months. These respondents were asked in which occupations they had experienced hard-to-fill vacancies over the previous 12 months. This was most commonly carpenters / joiners: 16% of employers with hard-to-fill vacancies, equivalent to 5% of all employers, had experienced difficulties when attempting to recruit this occupation. Following this, there was a long list of occupations where employers were experiencing recruitment difficulties to a broadly similar degree.



5.15 Respondents were asked if these hard-to-fill vacancies in each occupation had been for recruiting direct employees, self-employed or both. In a number of occupations the vast majority of hard-to-fill vacancies had occurred when trying to recruit direct employees and not the self-employed: admin staff, technical staff, plant and machine operatives, managers, scaffolders and surveyors / estimators, general labourers, and sales staff.

5.16 The following table summarises results, showing the proportion of those experiencing hard-to-fill vacancies in each occupation saying these were for direct employees, for self-employed and for both. The final column shows the proportion of employers saying hard-to-fill vacancies in that occupation had *only* occurred when trying to recruit direct employees. The occupations are shown in descending order by the extent to which employers had difficulties where attempting to recruit direct employees *only* (the last column of data). Figures are presented as row percentages.

Whether hard-to-fill vacancies for main occupations occur when attempting to recruit direct employed staff, self-employed or both

Base: employers with hard-to-fill vacancies in each occupation		Direct employees	Self-employed	Both	*Direct only*
Plant and machine operatives	%	99	16	15	*84*
Technical staff	%	100	21	20	*79*
Managers	%	89	27	16	*72*
Scaffolders	%	91	30	21	*70*
General labourers/operatives	%	97	37	34	*63*
Sales	%	78	39	18	*61*
Construction operatives nec*	%	81	59	39	*41*
Bricklayers	%	78	65	43	*35*
Welders / fabricators	%	77	66	43	*34*
Plasterers	%	61	67	27	*33*
Carpenter / joiners	%	57	69	26	*31*
Floorers	%	47	69	16	*31*
Painters/decorators	%	64	78	42	*22*
Roofers	%	82	79	61	*21*
Plumbers	%	49	90	39	*10*

**nec – not elsewhere classified*

5.17 For plumbers it was noticeable that where recruitment difficulties have been encountered it is where employers have been looking to recruit self-employed workers, indeed half the employers experiencing hard-to-fill vacancies for plumbers had been looking only to recruit self-employed plumbers.

5.18 In most other occupations not already discussed (including carpenters / joiners, plasterers, painters, bricklayers and welders / fabricators), there is a broad balance between the proportion that had been attempting to recruit direct employees or the self-employed (the first two columns of data).

Causes of hard-to-fill vacancies

5.19 Respondents experiencing recruitment difficulties were read a list of potential reasons and asked which they believed were causes of the hard-to-fill vacancies they had encountered for skilled staff in the previous 12 months. Most feel there were a number of contributory causes, with the most common reasons being a lack of skills, experience or motivation, as well as not enough people entering the industry.

Causes of hard-to-fill vacancies for skilled staff in the last 12 months (prompted unless stated)	
Base: employers experiencing hard-to-fill vacancies (320)	%
Applicants lack the skills we require	77
Not enough people being trained in the construction trades in recent years	77
Applicants lack the work experience we look for	70
Applicants lack the motivation / attitude we look for	70
Low number of applicants generally	62
Applicants lack the qualifications we look for	54
Competition from other employers	39
They are demanding too much money (spontaneous)	2
Bad location / unappealing work environment (spontaneous)	2

5.20 A lack of qualifications was mentioned by around half of employers experiencing hard-to-fill vacancies for skilled positions, hence this is an important contributory cause of recruitment difficulties, though in relative terms it is less critical than a lack of skills or a lack of work experience.

The skills lacking in applicants

5.21 All employers experiencing hard-to-fill vacancies (whether or not they said that skills shortages were a cause) were asked what they felt were the two main skills difficult to obtain from applicants. Results are summarised on the following table.

Two main skills lacking (spontaneous)	
Base: employers experiencing hard-to-fill vacancies (340)	%
Poor attitude (enthusiasm, motivation, commitment, willingness)	28
Relevant work experience	20
Construction qualifications / cards	11
Job-specific skills (occupation not mentioned)	9
Carpentry / joinery specific skills	8
Welding / fabricating skills	6
Painting / decorating skills	6
Driving (forklift, crane, van etc)	5
Basic education (literacy / numeracy)	4
Technical skills (including use of machinery)	4
Plumbing skills	4
Insulation-related skills / knowledge	4
Requirements for labourer / ground workers / general operatives	3
Plant machine operative	3

5.22 In many cases the skills lacking are very occupation specific, and in other cases the 'skill' is more about personal attitudes and commitment, or a lack of experience. Among broader generic skills mentioned were a lack of literacy / numeracy (4%), management or supervisory skills (1%), a lack of IT skills (1%) and a lack of social / people skills (1%).

The impact of hard-to-fill vacancies

5.23 Recruitment difficulties have a severe impact on those experiencing hard-to-fill vacancies for skilled staff: three-fifths have had to increase the use of overtime and the workload on staff, and half say it has increased operating costs and / or that they have lost business or not bid for work.

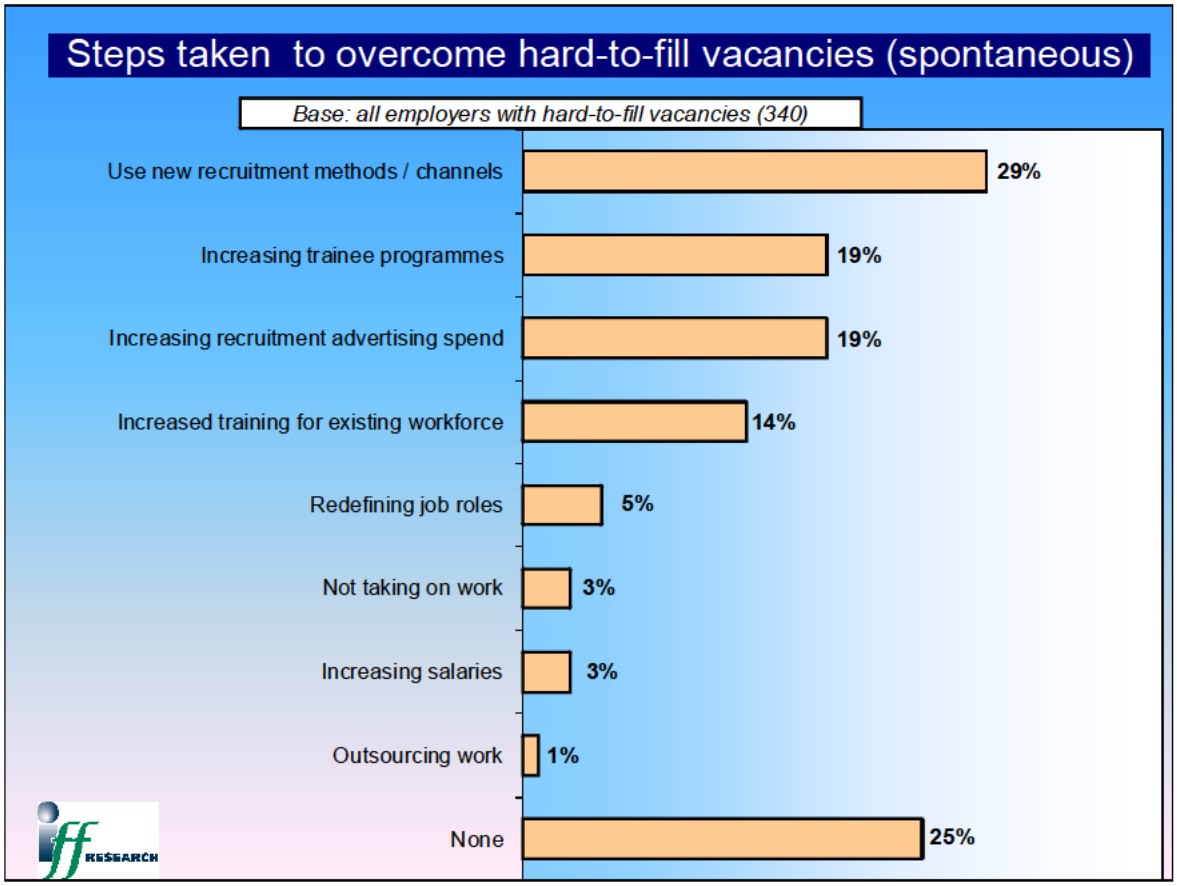
Impacts of hard-to-fill vacancies (prompted)	
Base: employers experiencing hard-to-fill vacancies (340)	%
Increase use of overtime / increased workload for staff	62
Increased operating costs	51
Lost business or not bid for work	51
Outsourced business	40
Missed project deadlines	27
None	11

5.24 Other spontaneous answers (each mentioned by 1%) included delivering poor quality work, staff morale being poor (for example as a result of stress brought on by increased workloads), and, more encouragingly, increasing their training activity.

5.25 Large establishments with 100 or more direct employees were more likely to say they had increased overtime and staff workload (76%) but much less likely than average to have lost business as a result of their recruitment difficulties (20%, compared to 41% among those with 10-24 staff and 55% among employers with 2-9 staff that reported recruitment difficulties). Poor staff morale and high levels of stress was particularly likely to be reported by those with 25-99 employees (8%), while increased training activity was more likely than average to be the response of small establishments with 10-24 direct employees (7%).

Steps taken to overcome recruitment difficulties

5.26 Most employers experiencing recruitment difficulties had taken some steps to try and overcome them (75%). This was most often trying new recruitment methods or channels (29%) or increasing advertising spend (19%), or, in relation to training, increasing trainee programmes (19%) or increasing training and skills for existing staff (14%).



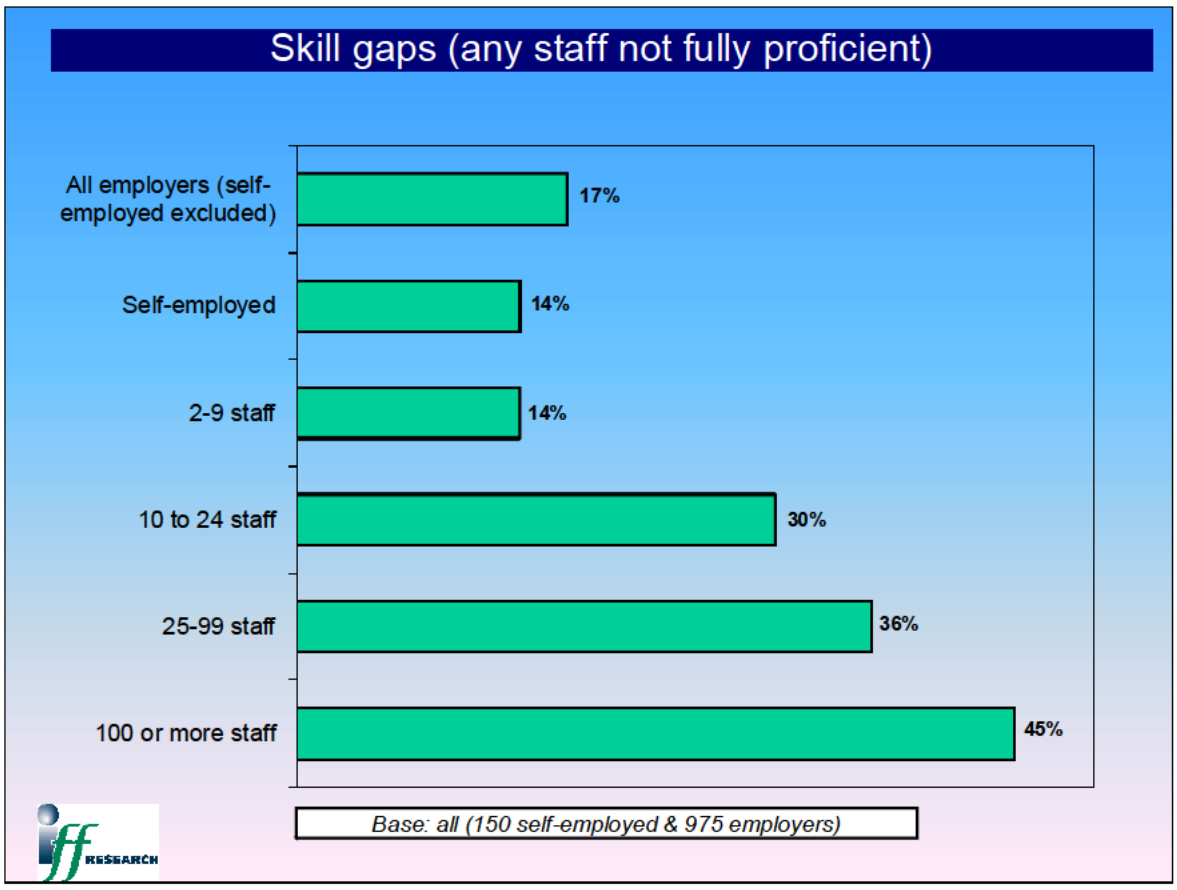
5.27 Nearly all employers with 25 or more staff experiencing hard-to-fill vacancies had taken steps to overcome their recruitment difficulties (96%), and they were particularly likely to have tried new recruitment methods or channels (40%), increasing trainee programmes (33%) and increasing training for their existing staff (25%).

6 Skill gaps

6.1 The previous chapter looked at the extent and nature of recruitment difficulties employers were experiencing when taking on skilled staff. This chapter turns from skills issues within the labour market to skill gaps among the directly employed workforce. Skill gaps are said to exist when an employee or employees are felt by their employer not to be fully proficient at their job. Clearly this potentially covers a wide range of ability from someone who is almost fully proficient to someone who needs to gain a lot more skills and experience to get to this level.

6.2 The following chart shows the incidence of skill gaps i.e. the proportion of employers who say they have some direct employees that lack proficiency (in the case of the self-employed whether the respondent considered themselves as fully proficient or whether instead there are skills they need to develop and improve).

6.3 Overall around one in six employers (17%) have staff lacking proficiency and one in seven of the self-employed (14%) regard themselves as having a skills gaps. Results overall and by size of establishment are summarised on the following chart. As a note the figure among employers is similar to that found among construction sector employers in England for the National Employers Skills Survey 2007 (14%).

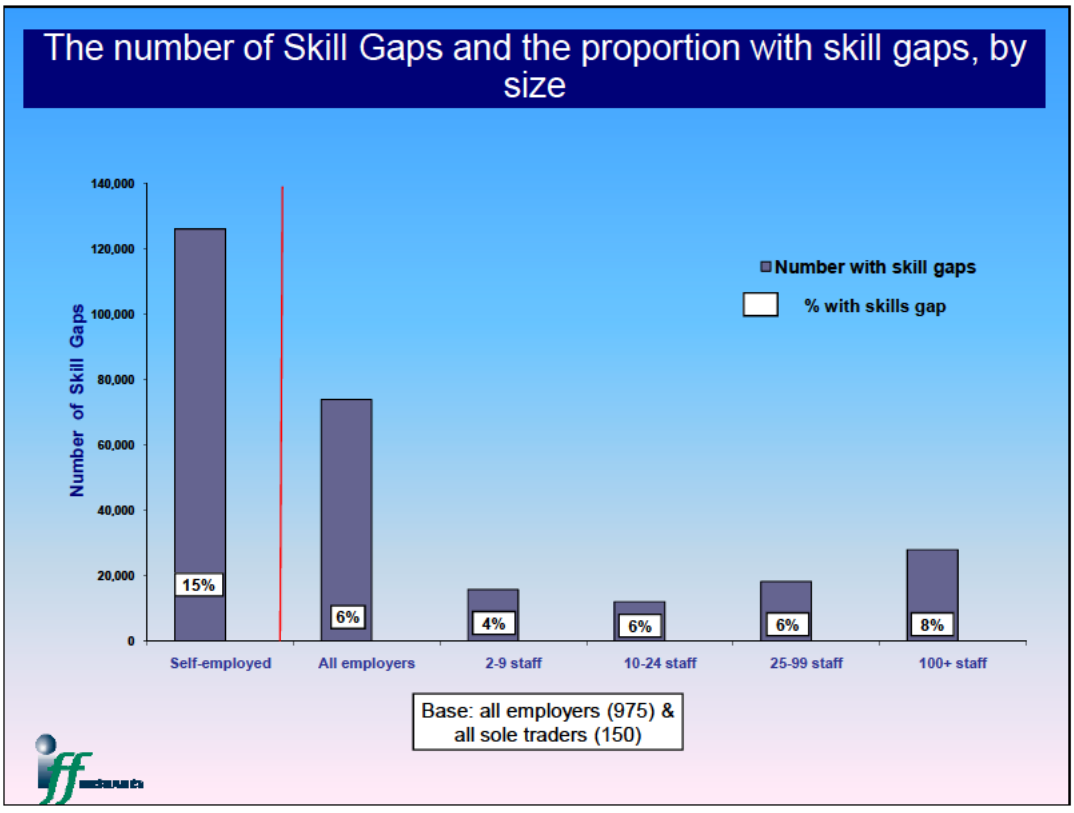


6.4 The larger the employer the more likely they are to have any skills gaps – this in part simply reflects the fact that they have more employees who could lack skills (we look later at the proportion of staff lacking skills and how this varies by size of establishment).

6.5 Results varied relatively little by country / region. It was higher than average in the South West (26% of employers reported some staff as lacking proficiency) and lower in the South East (12%) and the East of England (14%). In all other countries / regions it was in the 15% to 19% range.

The proportion of staff lacking skills

6.6 Overall employers describe some 74,000 direct employees as not fully proficient, equivalent to 6% of the directly employed workforce. This is the same proportion as found among construction sector employers in England for the National Employers Skills Survey 2007 (the all-sector figure was also 6%). Among the self-employed 15% felt they were not fully proficient and that instead there were skills they felt they needed to develop and improve. This is equivalent to some 126,000 self-employed lacking skills. Hence the survey results suggest that there are more self-employed believing that they have skill gaps than there are directly employed workers described by their employers as lacking proficiency. Results are summarised on the following table: the height of the bars shows the number lacking skills, and the percentage of the workforce not fully proficient is shown by the boxed percentage within each bar.



6.7 Among employers, both in numeric (volume) terms and as a percentage of the direct workforce, skill gaps are more prevalent in large firms. Within establishments with 100 or more direct employees, 8% of staff are described as lacking proficiency, twice the proportion found among micro firms with 2-9 direct employees.

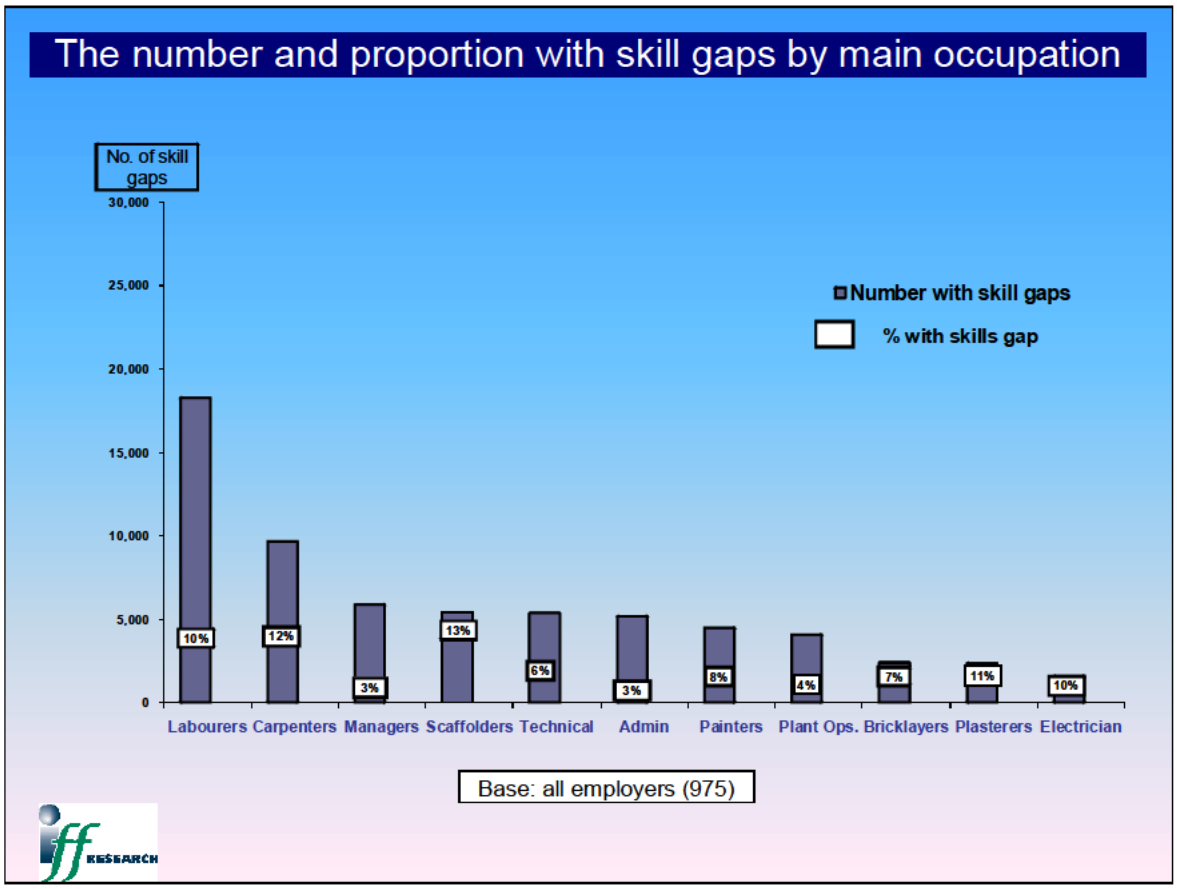
6.8 Employers in London reported the highest proportion of their workforce as having a skills gap (14%). By contrast only 3% - 4% of direct employees in the South East, North West, Yorkshire and Humberside and Wales were described as not being fully proficient.

The proportion of the directly employed workforce lacking skills by region

Base: direct employment	%
London	14
East Midlands	8
Scotland	8
West Midlands	7
South West	7
East of England	6
North East	5
Wales	4
Yorkshire and Humberside	4
North West	4
South East	3

The occupational profile of skill gaps

6.9 Employers with skill gaps among their directly employed workforce were asked how many staff in each occupation lacked proficiency. The following chart summarises results for the eleven occupations with the largest number of skill gaps (these account for almost nine in ten of all the skill gaps reported). Also shown is the percentage of those occupations described by employers as having a skills gap.



6.10 The largest volume of skills gaps was reported for labourers and general operatives, and one in ten of this occupation were described as not being fully proficient, despite this often being seen as an unskilled position. Carpenters / joiners had the next highest volume of skills gaps (around 9,500) and one in eight were described as lacking proficiency.

6.11 Following these a number of occupational areas had a broadly similar number of skill gaps (in the 4,500 – 6,000 range): managers, scaffolders, admin, technical staff and painters / decorators. However these varied widely in the likelihood of these staff being reported as lacking skills, and this was low for managers (3%) and admin staff (3%) and relatively high for scaffolders (13% were described as lacking full proficiency).

6.12 Although the total number of plasterers and electricians described as lacking proficiency is relatively low, a higher than average proportion of these workers were felt to lack proficiency (11% and 10% respectively).

6.13 Some of the occupations not shown on the previous chart (hence where the volume of skills gaps is relatively low in numeric terms) include roofers, construction operators not elsewhere classified, multiple skilled operatives, welders/fabricators and surveyors/estimators. In each of these individual occupations 700 – 1,500 staff overall were felt to lack skills. For welders a low proportion were felt to lack skills (3%), but this rises to 7% of roofers, and 14% of those described as multi-skilled operatives undertaking a number of different roles.

6.14 Base sizes for the self-employed feeling they lack skills are relatively low, but results suggest that those describing their job role as the owner / manager, electricians or as having technical roles were more likely than average to feel they lacked skills, while the self-employed working as carpenters/joiners, bricklayers and general labourers were less likely than average to feel they lacked skills.

The nature of skills gaps

6.15 For up to two of the occupational groups where staff have skills gaps employers were asked to indicate what skills need improving. Responses were often very specific to the occupational area, but among the broader areas mentioned were:

- A lack of relevant work experience (34% of employers with skills gaps)
- Attitude / motivation (15%)
- Construction qualifications including cards (9%)
- IT skills (1%)
- Managerial / supervisory skills (4%)
- Technical skills - including equipment knowledge (4%)
- Social / people / communication skills (2%)
- Social / people skills – including customer service skills (2%)
- Basic education – literacy / numeracy / general knowledge (1%)

6.16 For the National Employers Skills Survey 2007 (NESS 07), the nature of skill gaps was asked as a prompted question with the list of potential skill gaps read out to respondents, rather than as a spontaneous question as used for the current survey. Hence much higher levels of each skills gap are reported in NESS 07. For NESS 07, employers covered by ConstructionSkills SSC that had skills gaps were most likely to report skills gaps in the following areas: technical and practical skills (61%), problem solving skills (34%), oral communication (31%), team working (31%), customer handling (26%), management (26%) and written communication skills (25%).

6.17 Predictably the range of skills lacking varied quite widely by occupation. This is shown in the following table for some of the occupations where a reasonably large number of respondents answered about that occupation – base sizes are still quite low (and are shown in brackets) and hence results are best treated as indicative only.

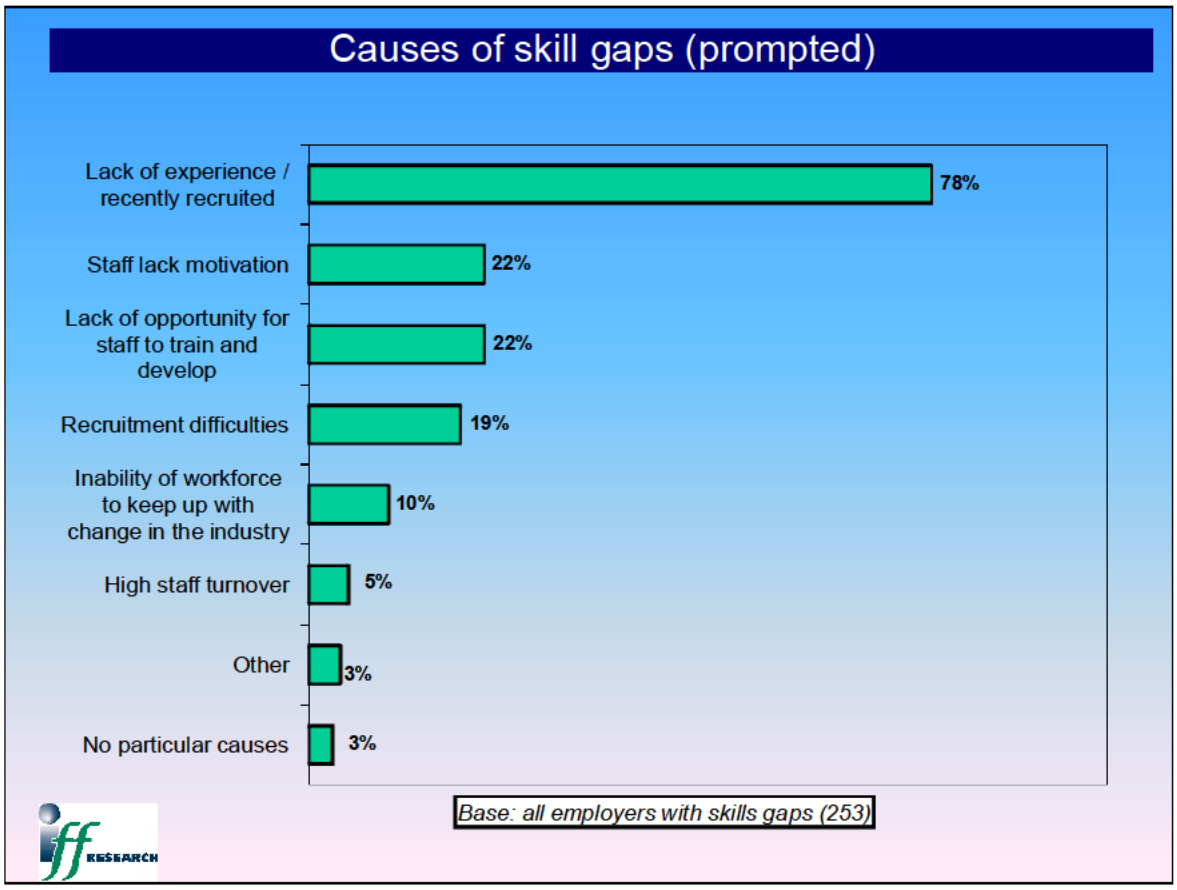
Main skills that need improving by selected occupations	
Labourers (57)	Attitude / motivation (34%), relevant experience (31%), construction qualifications / cards (15%), labourer / ground worker skills (7%)
Carpenters / joiners (47)	Relevant work experience (36%), carpentry / joinery and job specific skills (25%), attitude / motivation (19%).
Managers (36)	Managerial / supervisory skills (33%), attitude / motivation (26%), social / people / communication skills (19%), IT skills (13%)
Plant / machine operatives (26)	Construction qualifications / cards (30%), attitude / motivation (23%), relevant experience (11%).
Painters / decorators (22)	Relevant experience (53%), painting / decorating specific skills (38%)

6.18 For labourers and general operatives the emphasis is on attitude and motivation and a lack of relevant experience. For carpenters / joiners these are both issues (though with less emphasis on attitude and motivation), as are specific carpentry / joinery skills. Managers are often seen as lacking management and supervisory skills, and also people management skills, but also somewhat surprisingly the right attitude and motivation. For plant and machine operators the most common 'skill' missing is the required qualifications or cards, though poor motivation and attitude are quite often mentioned. Painters and decorators, on the other hand, are usually seen as lacking some job-specific skill or relevant experience.

6.19 Among the self-employed who reported that they had skills gaps (a low base of 17 respondents, hence caution is needed with the results), while the skills were often job-specific to their area of work (painting / decorating, bricklaying, electrical skills etc), it was noticeable that the single most common skill shortage cited was IT skills, mentioned by a fifth of these respondents.

The causes of skill gaps

6.20 Employers were read a list of potential causes of skills gaps and asked which they thought were causes of their skills gaps. Results are summarised on the following chart.



6.21 The most common cause of skills gaps is that staff lack experience or have been recently taken on, a factor felt to contribute to skills gaps for around three quarters of employers with skills gaps (78%). Nearly all employers with 100 or more staff that reported staff lacking proficiency (a base of 60 respondents) said this was one of the causes of their skill gaps (95%). The relatively encouraging aspect of this is that these skill gaps could be expected to be relatively short term, easing as these employees gain experience and get to understand that company's way of operating.

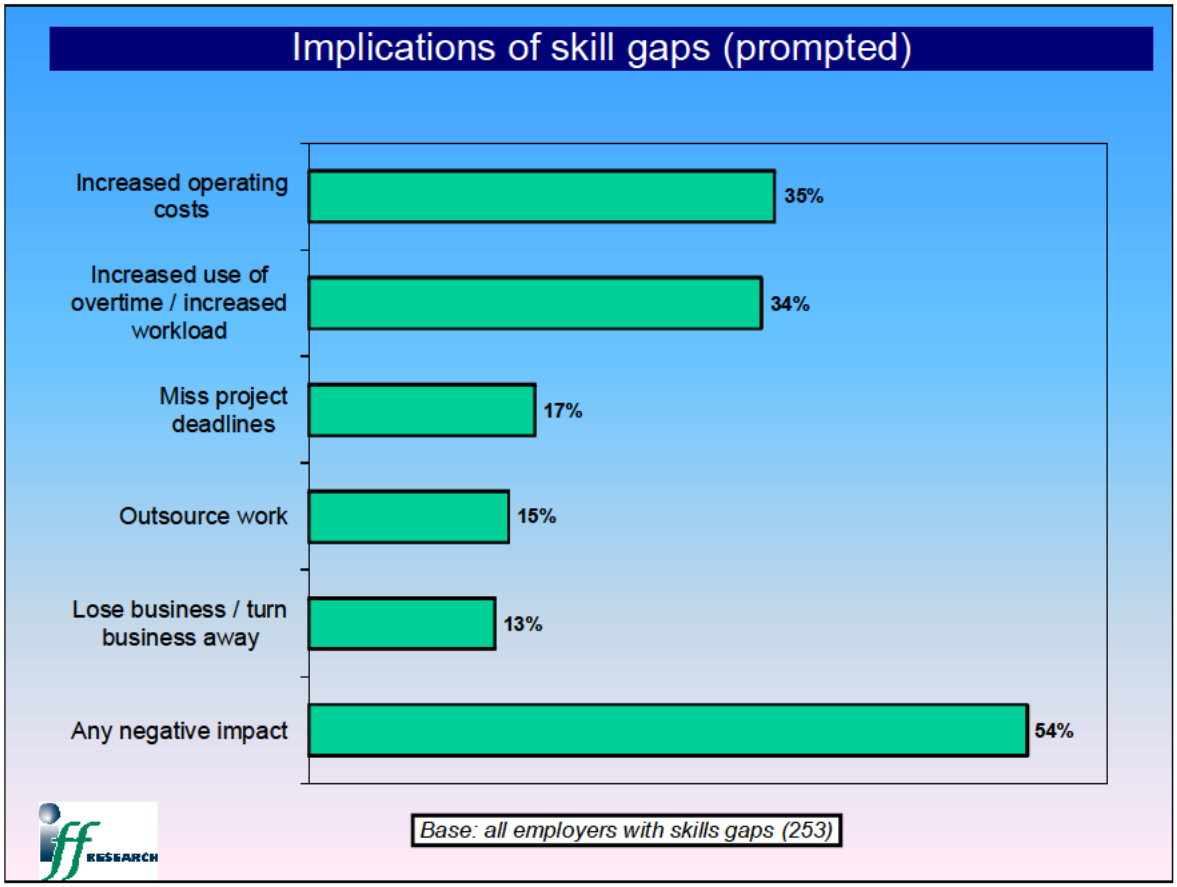
6.22 Three causes were mentioned by around a fifth of those with skills gaps: staff lacking motivation (22%), a lack of opportunity to train and develop staff (22%) and recruitment difficulties (19%).

6.23 All the factors mentioned on the chart are more likely than average to be mentioned by large employers with 100 or more staff (in each case the proportion mentioning each factor is at least 10% higher than the figure among all employers). This is likely to reflect the fact they have more staff lacking proficiency, hence a wider range of reasons explaining these skills shortfalls.

6.24 Relatively few self-employed respondents felt they lacked skills (17, a low base hence results need to be treated as indicative only), but predictably the reasons they give as to why they lack skills are somewhat different to employers, with by far the most common reason, mentioned by 40%, being that they lack the opportunity or time. Some admitted that they lacked experience (18%), but this is far less of a cause of skill gaps among the self-employed than among the directly employed workforce. Others causes included finding it hard to keep up with changes in the industry (often specifically legislation) and a lack of motivation.

The impact of skill gaps

6.25 Employers with skill gaps were read a list of potential impacts and asked which had occurred for their establishment from having some staff not fully proficient.



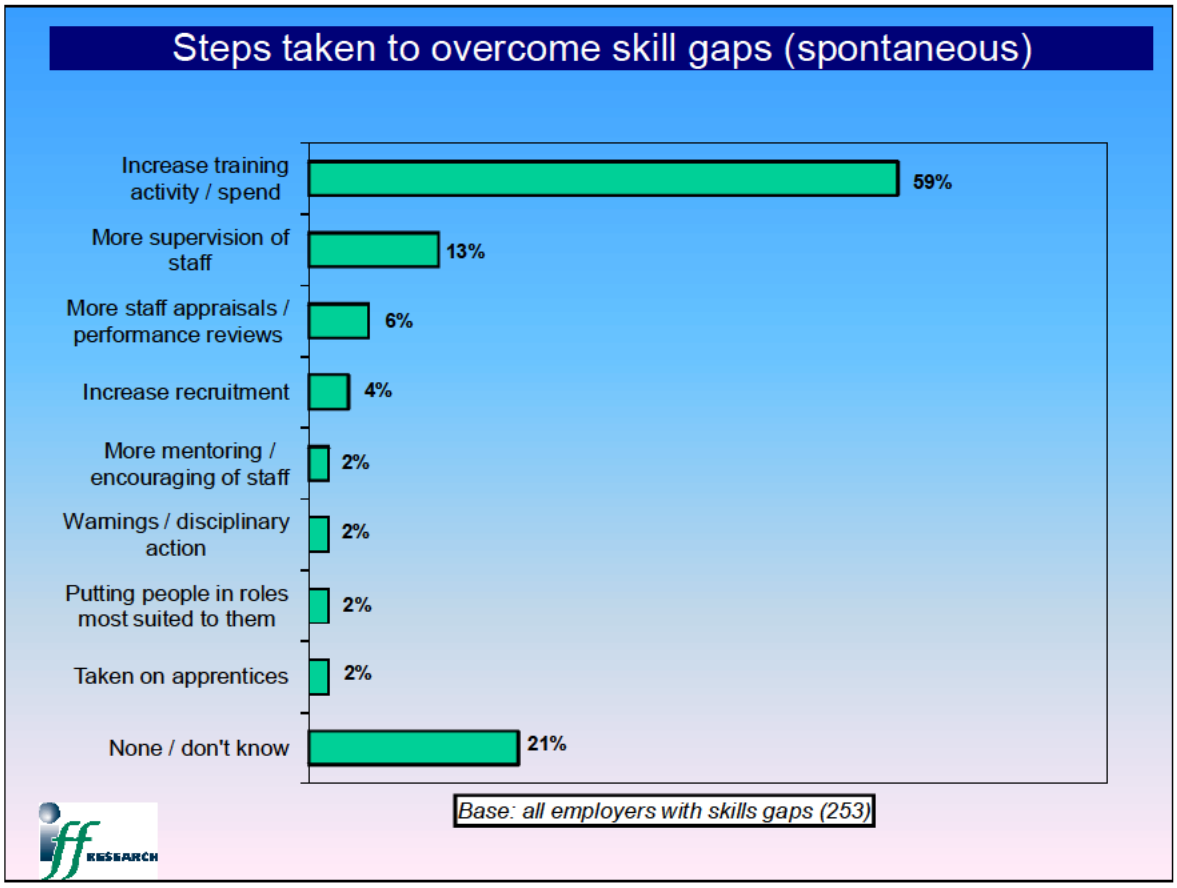
6.26 Around half of these employers felt at least one of these negative consequences had arisen as a result of their skills gaps. This was most often increased operating costs (35%) and increased workload and use of overtime (34%). Relatively few had turned business away as a result of their staff lacking proficiency (13%), although around one in six had been late delivering projects (17%).

6.27 Establishments with 10-24 staff that had skills gaps were the most likely to experience any of these negative consequences (64%), and for two in five it meant increased workloads and use of overtime (40%). Medium sized companies were the most likely to report increased operating costs as a result of staff having skills gaps (43% among those with 25-99 direct employees). Large employers with 100 or more staff with skills gaps were more likely than average to have faced increased operating costs (45%), to have missed project deadlines (25%) and to have had to outsource work (24%).

6.28 Where the self-employed admit to having skill gaps the consequences appear to be much more severe than reported by employers. Although a low base of 17 respondents, and hence caution is needed, over two thirds of the self-employed lacking skills had had to turn business away or not bid for work as a result, and just over two-fifths reported increased operating costs.

Steps taken to overcome skill gaps

6.29 Employers with skill gaps were asked what steps they had taken, if any, to overcome the fact that they have staff that are not fully proficient. Results on this spontaneous question are shown on the following chart.



6.30 The vast majority of those with skill gaps (79%) have taken some action to overcome the difficulty, most commonly increasing training activity and or spend (59%). This was a particularly common reaction of those with 25-99 and 100+ direct employees (81% and 86% respectively). Overall around one in eight (13%) have increased staff supervision, implying more on-the-job training, and this was much more likely to have been instigated by small and medium firms than large (15% of those with 2-99 staff compared with only 3% of those with 100 or more staff that have skills gaps).

6.31 Other responses to skill gaps are much less common (4% or less): these include increasing recruitment activity, more mentoring and taking on apprentices.

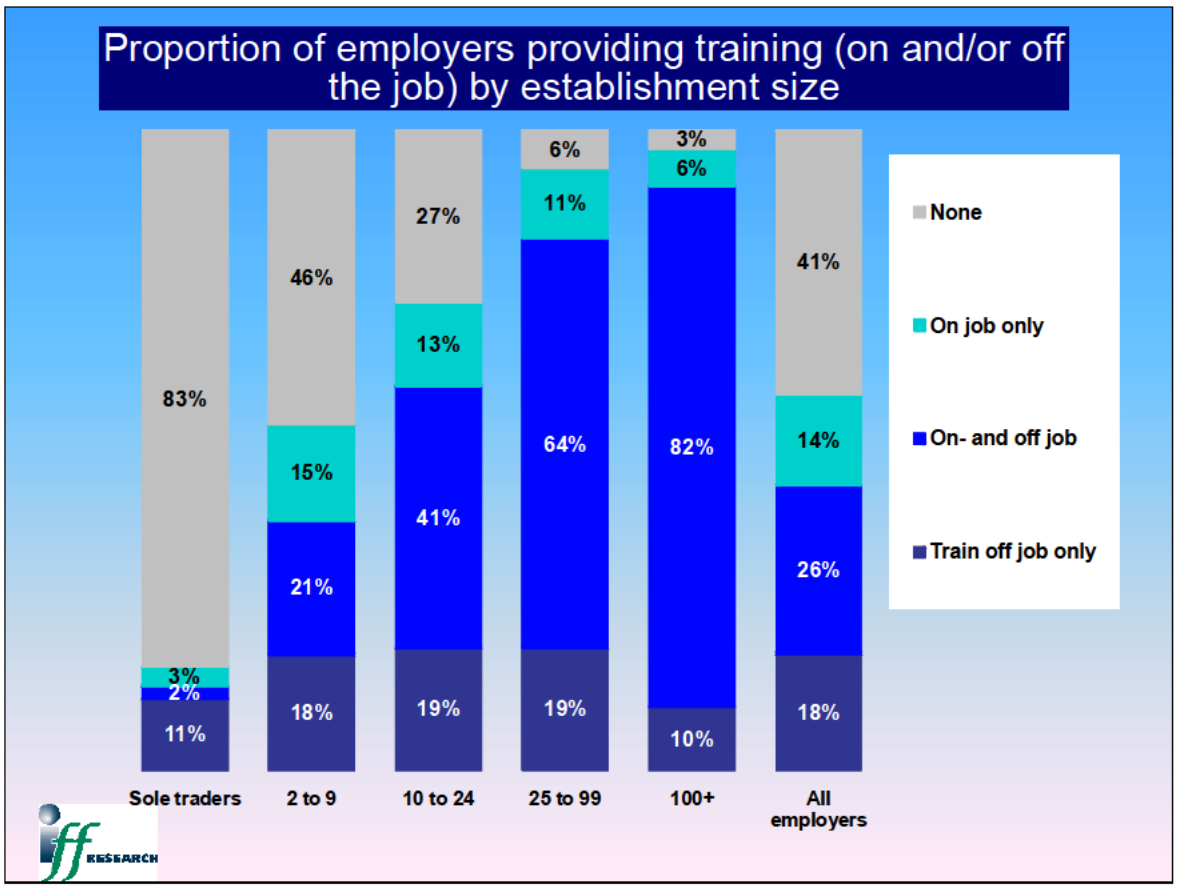
6.32 Sole traders with skill gaps were more likely than employers to have taken no steps (43%, again the low base of 17 respondents should be noted), and where they had tried to take action this was often trying to recruit staff (29%), with relatively few undertaking or increasing their training activity (13%).

7 Workforce training and development

7.1 This chapter examines the extent and nature of training and development activity. It discusses off-the-job training (described as that away from the individual's immediate work station) and on-the-job training (described as activity that would be recognised as training by staff rather than 'the sort of learning by experience which could take place all the time'), the degree of training leading to qualifications, and the types of training undertaken.

7.2 Results exclude Apprenticeship training, and regarding the numbers trained cover both direct employees as well as self-employed and other staff working for the employer.

7.3 Overall, three-fifths of establishments (59%) have funded or arranged training or development for staff in the past 12 months (almost identical to the 60% found among construction sector employers for the National Employers Skills Survey 2007). The proportion of establishments providing training increases with establishment size, from 54% among those employing 2-9 staff, up to 97% among those employing 100 or more direct employees. Among sole traders / the self-employed around one in six (17%) have undertaken or provided training in the past 12 months. The following chart summarises results, and shows the proportion of sole traders and the self-employed delivering on- and off-the-job training, or both.



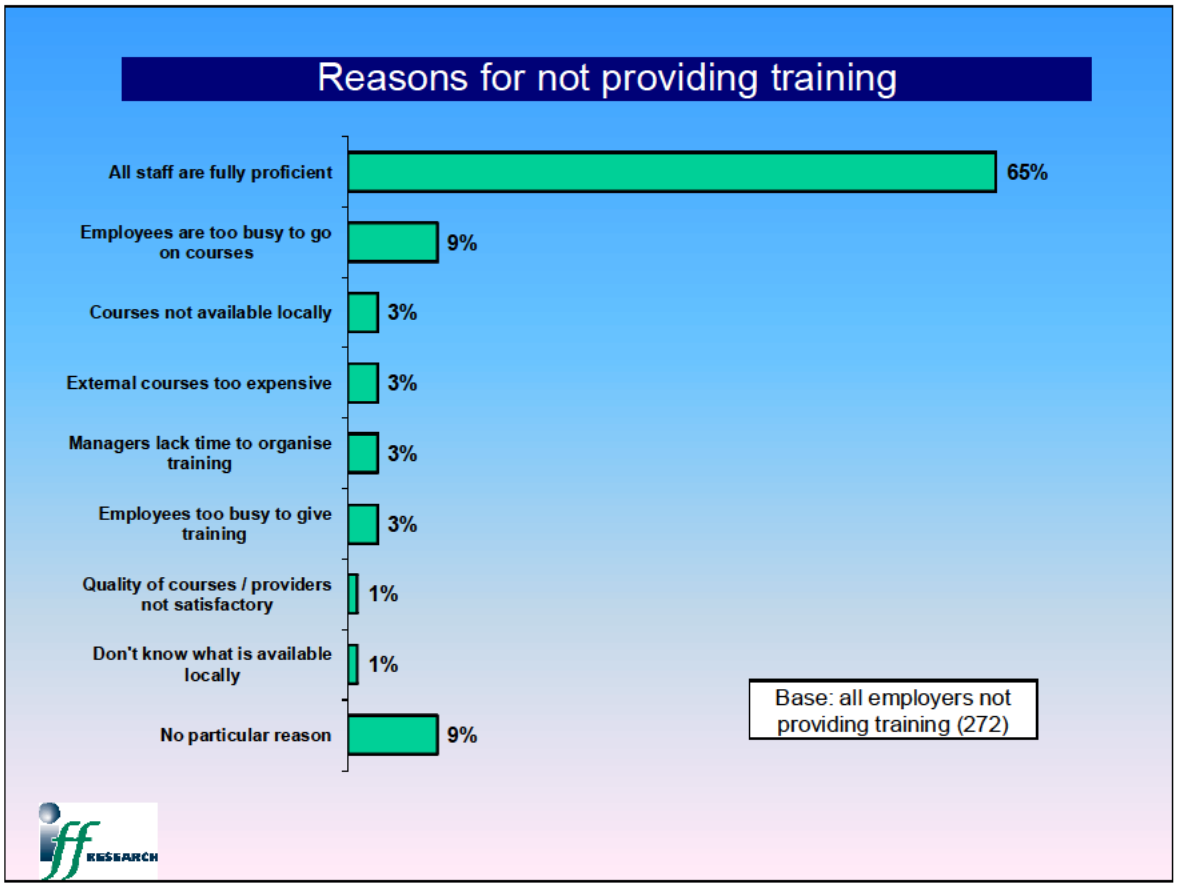
7.4 Overall over two-fifths of firms deliver some off-the-job training (44%) equivalent to three-quarters of those that train. This is largely driven by the practices of smaller establishments with 2-9 employees, and among large firms that train nearly all undertake some off-the-job training.

7.5 Differences by sub-sector were relatively slight though firms in the renting equipment with operator and building completion subsectors are less likely than average to provide training (53% in both subsectors). There is also some variation by country, with establishments in Wales much less likely to provide training than those in Scotland (44% vs. 69%).

7.6 Results on the balance of off-the-job and on-the-job training are very similar to those reported for the last National Employers Skills Survey conducted in 2007. That found that in the previous 12 months 45% of all construction sector employers undertook any off-the-job training and 17% had only undertaken such training, compared against 43% undertaking on-the-job training and 15% only undertaking this kind of training. Comparative figures for the current survey among employers in England were 44%, 18%, 40% and 14% respectively.

Reasons for not providing training

7.7 Employers who had not funded or arranged training in the previous 12 months were asked as a spontaneous question what their reasons were for not having done so.



7.8 By far and away the most common reason for not training, mentioned by almost two thirds of these employers, is a belief that all staff are fully proficient. Supply-side issues (the required courses not being available locally, the quality of local courses or providers being unsatisfactory, the start dates or times of courses being inconvenient, and courses being too expensive) were mentioned by 7% of employers, hence they are contributory but not the critical reason for not training.

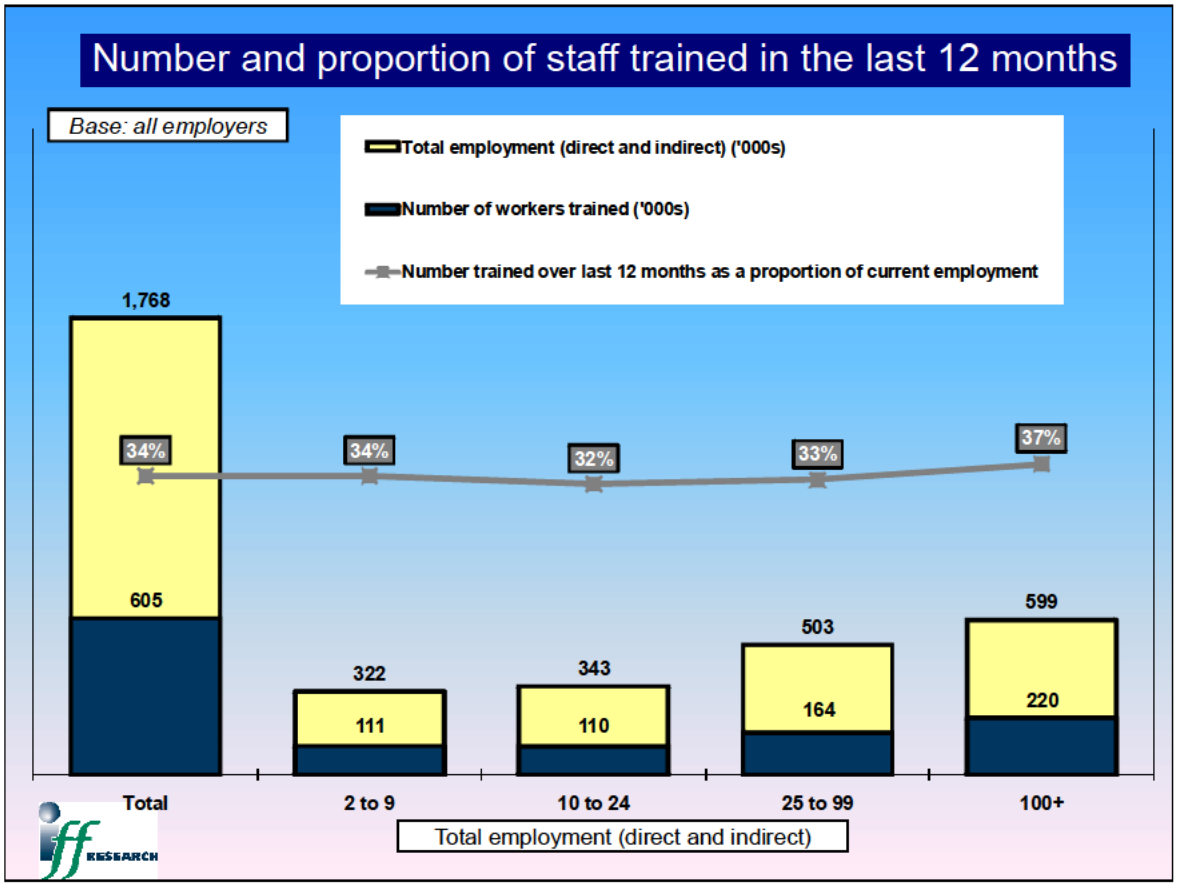
The proportion of the workforce receiving training

7.9 Employers reported providing training over the previous 12 months for approximately 605,500 workers (both direct employees and self-employed / indirect labour). This is equivalent to 34% of the total current construction sector workforce (i.e. covering the direct and indirect workforce) and to 51% of the current directly employed workforce. The latter compares quite closely to the 54% found for the National Employers Skills Survey 2007.

7.10 It should be noted that the question asked employers how many staff at the establishment they had funded or arranged training for in the previous 12 months *including any staff who had since left*. This means employers can give a figure for the number of staff trained over the previous 12 months which is higher than their current number of employees. One implication is that the overall number of staff trained as a proportion of the workforce is likely to be something of an overestimate in that employees who were trained by one employer in the previous 12 months, then changed employer and received training in their new position will be counted twice.

7.11 Around half of employers who train (54%) provided training over the last 12 months for a number of staff equivalent to at least half their current workforce. One in six (16%) employers that train appear to provide training to all their staff (i.e. the number of direct and indirect staff trained over the last 12 months is equivalent to or exceeds their total current employment).

7.12 The following chart shows the number of workers (covering both direct employees and the self-employed and other indirect labour) trained over the last 12 months, and the proportion this represents of the total current direct and indirect construction workforce.



7.13 We have seen that the number of workers trained by employers over the last 12 months is equivalent to 34% of the total current workforce. This proportion varies relatively little by the size of establishment in terms of the total direct or indirect workforce, though it is slightly higher among those with a total workforce of 100 or more (37%).

Off-the-job training volumes

7.14 The occupational groups that employers providing off-the-job training had most commonly provided this training for were managers (39% of those providing off-the-job training had provided it for at least some of their managers), labourers / general operatives (25%), admin staff (18%), technical staff (16%), plant and machine operators (15%) and carpenters / joiners (13%). However, this largely reflects that some occupations are more frequently employed (such as managers), and the more interesting finding is the actual number and proportion of each occupation trained.

7.15 This is shown in the following table. Figures on the proportion trained shown in the final column are indicative only – the occupational profile used to produce this figure was asked only of directly employed staff while the training figure shown in the first column of data was asked of all staff, direct and indirect staff. Occupations are ranked in descending order of the proportion being trained.

Distribution of off-the-job training by main occupational groups

Base: All employers (975)	**All receiving off-the-job training in previous 12 months**	***All receiving off-the-job training in previous 12 months as % of current directly employed staff***
		%
Construction operatives nec*	18,250	*57*
Bricklayers	19,150	*55*
Roofers	12,050	*53*
Electricians	7,875	*47*
Scaffolders	18,600	*46*
Carpenters/ joiners	36,350	*45*
Plumbers	6,650	*43*
Technical staff	35,300	*42*
Managers	78,875	*41*
Floorers	6,375	*40*
Labourers and general operatives	71,050	*39*
Plant and machine operatives	41,875	*39*
Plasterers	8,275	*38*
Welders/ fabricators	9,100	*36*
Painters/ decorators	21,200	*38*
Administrative staff	35,400	*21*

Figures rounded to nearest 25.
** nec – not elsewhere classified*

7.16 In absolute terms, more managers have received off-the-job training in the last 12 months than any other occupational group, followed by labourers and general operatives. In each of these occupations, over 70,000 workers have been trained in the last year, accounting for almost one third of all those receiving off-the-job training in the construction sector. Results suggest that the number trained off-the-job in these two occupations in the last 12 months is equivalent to around two in five of the number currently directly employed in these two occupation groups.

7.17 There are a number of occupations where results indicate that a much higher than average proportion of staff are trained off-the-job. This applies particularly to operatives, bricklayers and roofers. Although the number of administrative staff receiving off-the-job training is quite high, the proportion of these workers receiving off-the-job training in the last year is far lower than found for the other main occupational groups.

On-the-job training volumes

7.18 The following table illustrates the number of workers who have received on-the-job training in the past 12 months and the proportion that represents of current direct employment within the occupation.

Distribution of on-the-job training by main occupational groups

Base: All employers (975) *Figures rounded to nearest 25*	All receiving on-the-job training in previous 12 months	All receiving on-the-job training in previous 12 months as % of current directly employed
		%
Bricklayers	22,000	64
Carpenters / joiners	41,300	51
Floorers	7,700	48
Scaffolders	18,925	47
Plasterers	10,025	45
Welders/ fabricators	11,250	45
Plumbers	6,475	42
Roofers	9,450	41
Labourers and general operatives	72,050	40
Electricians	6,750	40
Plant and machine operatives	37,325	35
Technical staff	29,300	35
Construction operatives nec*	11,253	35
Managers	56,025	29
Painters/ decorators	15,725	28
Administrative staff	33,450	20

*nec – not elsewhere classified

7.19 In absolute terms, more labourers and general operatives have received on-the-job training in the previous 12 months than any other occupational group (c. 72,000). Managers are the second largest occupational group in terms of total numbers trained, with approximately 56,000 managers trained on-the-job.

7.20 However, relative to the number of employees in that occupational group, a number of occupations are more likely than either of these two groups to receive on-the-job training, with the figure being particularly high for bricklayers, carpenters / joiners, floorers and scaffolders. As with off-the-job training, a relatively large number of administrative staff, but a low proportion, receive on-the-job training.

7.21 It is interesting to compare the likelihood of different occupational groups receiving off- and on-the-job training. Construction operatives not elsewhere classified, roofers and managers are considerably more likely to have received off-the-job training in the last 12 months than on-the-job training. Conversely, plasterers, bricklayers, welders and carpenters / joiners are more likely to have been trained on-the-job than off-the-job.

Comparison of off- and on-the-job training by main occupational group

Base: all employers (975)	**All receiving off-the-job training in previous 12 months as % of current direct employment**	**All receiving on-the-job training in previous 12 months as % of current direct employment**	**Difference**
			%
Other construction operatives	57	35	22
Roofers	53	41	12
Managers	41	29	12
Painters/ decorators	38	28	10
Technical staff	42	35	7
Electricians	47	40	7
Plant and machine operatives	39	35	4
Plumbers	43	42	1
Administrative staff	21	20	1
Labourers and general operatives	39	40	-1
Scaffolders	46	47	-1
Carpenters/ joiners	45	51	-6
Plasterers	38	45	-7
Floorers	40	48	-8
Welders/ fabricators	36	45	-9
Bricklayers	55	64	-9

How much training do employers fund or arrange?

7.22 Establishments providing off-the-job training had funded or arranged an average of 10 days of such training per person trained in the past 12 months, while establishments providing on-the-job training have arranged an average of 21 days of training. As a note the latter figure is heavily influenced by employers saying they gave more than 40 days on-the-job training per recipient over the last 12 month – if these employers are excluded the figure drops to 7 days of on-the-job training per recipient.

7.23 The survey results are a little higher than found among construction sector employers in the National Employers Skills Survey 2007, when it was found than recipients of off-the-job training received 8 days such training per annum, and recipients of on-the-job training received 15 days such training per annum. However, the findings are consistent between the two surveys in the ratio of on- and off-the-job training, with approximately twice as much on-the-job training days being provided as off-the-job.

7.24 The following illustrates the breakdown of off-the-job and on-the-job training days per trainee among those establishments providing off-the-job and on-the-job training respectively.

Training days per trainee per annum (off-the-job and on-the-job)

	Number of days of OFF-the-job training per trainee in previous 12 months	Number of days of ON-the-job training per trainee in previous 12 months
Base: All employers who provide training (unweighted)	*580*	*528*
	%	*%*
1 day or less	14	12
2 days	20	15
3-4 days	24	18
5-6 days	16	17
7-8 days	5	3
9-10 days	6	5
11 or more days	14	24
Mean	*10 days*	*21 days*

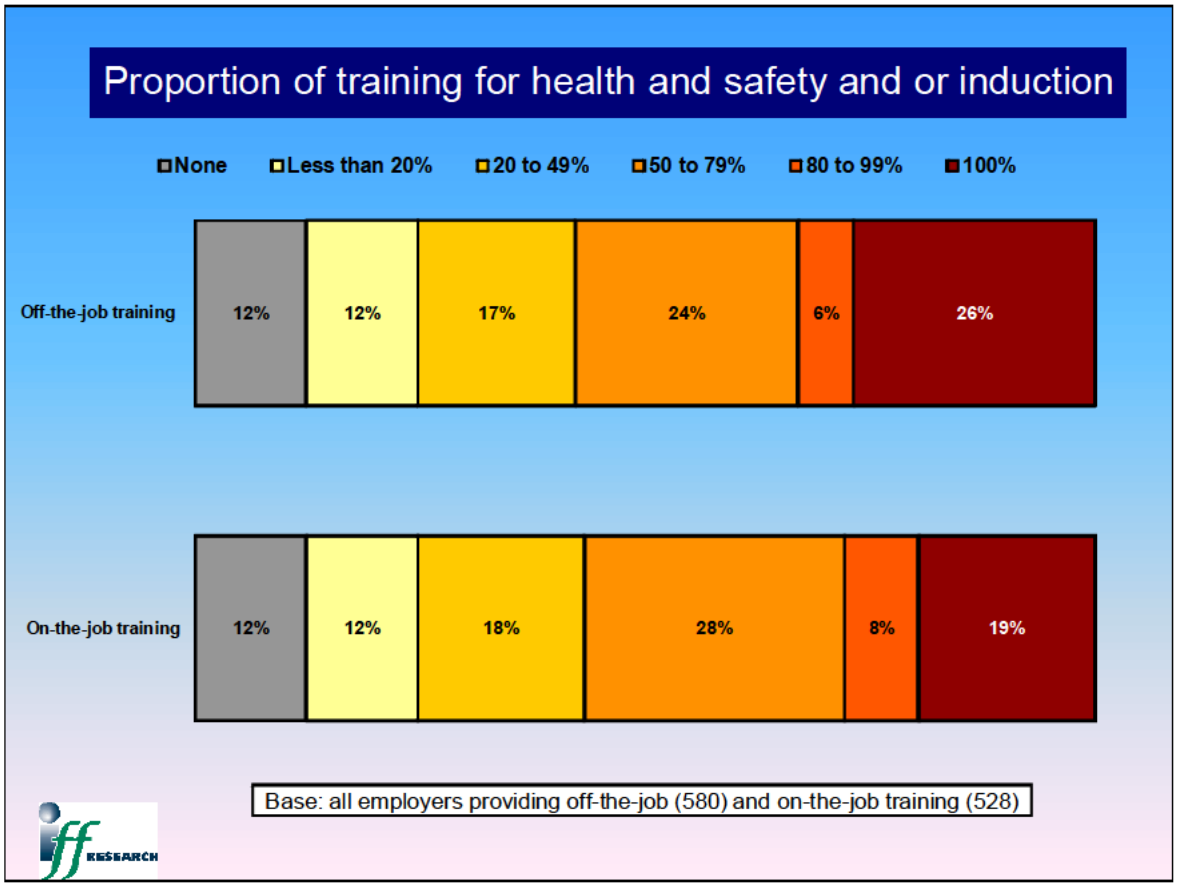
7.25 As shown in the following tables, there is no particular pattern by total employment size in terms of the average number of days that employers give to workers trained on- or off-the-job.

Mean number of training days per recipient per annum by size

	Total employment (direct and indirect labour)				
	All	2 to 9	10 to 24	25 to 99	100+
Base: All employers who provide off-the-job training (580) and on-the-job training (528)	*580*	*173*	*133*	*150*	*124*
Days off-the-job training per recipient in last 12 months	10	9	7	16	13
Days on-the-job training per recipient in last 12 months	21	19	20	32	19

The proportion of training activity which is induction or health and safety training

7.26 Clearly although training can seek to enhance skills and productivity, it can often be about more immediate though still crucial issues, such as health and safety or induction. To this end employers were asked what proportion of their training had been health and safety or induction training. The question was asked separately for off- and on-the-job training. Results are summarised on the following chart.



7.27 Almost one in five establishments providing on-the-job training had provided only health and safety or induction on-the-job training, and the same applies to a quarter of establishments providing off-the-job training. For both types of training more than half of employers indicated that most of their training was for health and safety and induction.

7.28 The importance of health and safety for the industry can be seen in that only around one in eight employers say that none of their off-the-job or on-the-job training covered health and safety or induction.

Training towards qualifications

7.29 Where employers had funded or arranged any training for employees over the previous 12 months, they were asked how many employees had been trained towards a nationally recognised qualification, and of those how many were being trained towards a national vocational qualification (NVQ) and at what level.

7.30 A slight minority of employers that train (43%) indicate that any of their training was intended to lead to a qualification. This is much higher among larger employers (69% among those that train that employ 25-99 staff in total, and 78% among those with 100 or more staff) suggesting they place greater relative importance on qualifications than smaller employers.

7.31 Results suggest that employers had had approximately 257,000 staff on training over the last 12 months that was intended to lead to a qualification. This is equivalent to 42% of the workers trained in this period, and 15% of the total current workforce (the latter is very close to the 14% found for construction sector employers on the National Employers Skills Survey 2007). Again confirming the importance placed on qualifications by larger employers, the proportion of the workforce being trained where this has been intended to lead to a qualification increases by size of establishment, from 22% among those where 2-9 staff are employed in total, 28% where 10-24 are employed, 34% where 25-99 are employed, up to 67% among establishments with 100 or more staff.

7.32 Training to qualifications is most often to NVQs or SVQs: 71% of employers training staff towards qualifications said some staff had been studying towards NVQs or SVQs, and 77% of the staff working towards qualifications had been working towards an NVQ or SVQ. This contrasts with 3% of those working towards a qualification aiming to obtain an HNC or HND.

7.33 Employers using NVQs / SVQs were most likely to have had staff train at level 2 (45%) or level 3 (31%). This is shown in the following table overall and by size of employer. Results show that large employers rarely have staff studying towards a level 1 qualification. It also shows that many small and medium employers have staff training to NVQs / SVQs without knowing exactly what level they are working towards.

Main level of NVQ / SVQ used

	Total employment (direct and indirect labour)			
	All	**2 to 24**	**25 to 99**	**100+**
Base: All employers with staff training to NVQs in the last 12 months	*325*	*112*	*97*	*116*
	%	%	%	%
Level 1	12	13	9	3
Level 2	45	40	54	62
Level 3	31	31	25	45
Level 4 or above	9	6	14	11
Don't know / not sure	16	19	15	1

Figures add to more than 100% as respondents could give multiple answers

Assessing the impact of training

7.34 Employers who had funded or arranged training within the last 12 months were asked whether they formally assess whether the training and development impacts on the performance of the people trained. Only just over half of employers (54%) that train do formally assess this, though this increases with size, and among trainers with 100 or more direct employees, three-quarters (75%) formally assess the impact of training on performance.

7.35 Results are slightly lower than found on the National Employers Skills Survey 2007, when 59% of construction sector employers that train said they formally assess whether the training and development impacts on the performance of the people trained.

Methods of delivery

7.36 Employers that train were asked whether or not they had used a range of types of training provider and training approaches. Results are summarised on the following table.

Incidence of using different types of training provider by size of employer

		Direct employment size band			
	All	**2 to 9**	**10 to 24**	**25 to 99**	**100+**
Unweighted base	*703*	*238*	*158*	*173*	*134*
	%	%	%	%	%
By a private training provider (other than an FE college, university or the NCC)	58	55	64	76	80
By a manufacturer or supplier	34	30	44	46	59
By a Further Education (FE) college	25	22	23	46	60
By a Professional Institution for example for Continuing Personal Development	22	19	20	38	61
By the National Construction College (NCC)	12	9	17	28	41
By Higher Education (e.g. university)	4	2	6	16	52
On-the-job learning or training by where a more experienced worker	69	65	81	84	83
Self-learning e.g. using books and manuals	46	43	53	53	65
Other off-the-job training such as courses or formal instruction	41	36	49	66	69

Base: All employers who have funded or arranged training in previous 12 months.

7.37 In terms of type of provider, private providers and consultants are the most commonly used (58%). A third of trainers had received training from a manufacturer or supplier in the last 12 months (34%), and around a quarter had had staff training with a Further Education (FE) college (25%) or via a professional institute (22%). One in eight of those training said they had used the NCC on the last 12 months (12%).

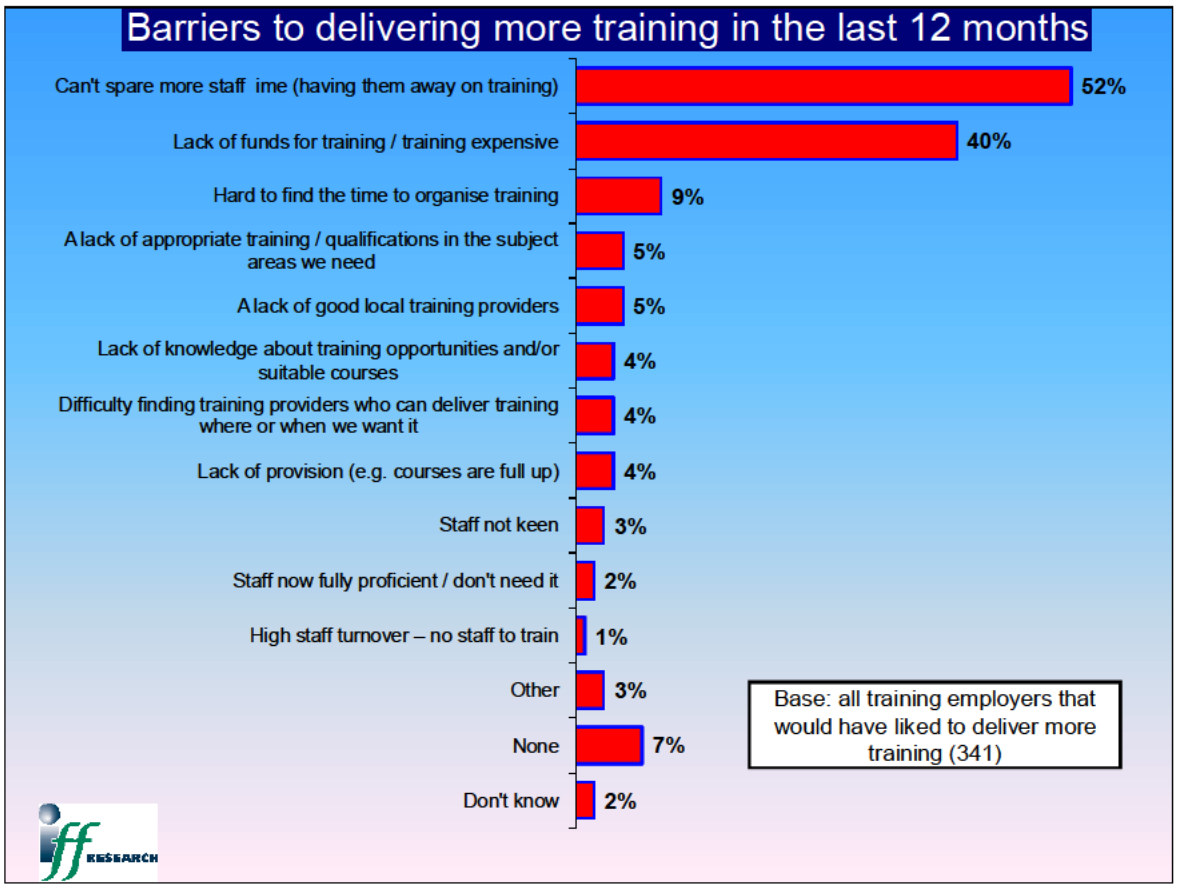
7.38 Large employers, particularly those with 100 or more direct employees, were far more likely than average to have used each type of provider indicating that they use a wide range of suppliers. For example as many as half these employers had used a university to deliver some of their recent training (52%), a supplier used by very few smaller employers.

7.39 Results on the use of FE are similar to those found for the National Employers Skills Survey 2007, when 28% of construction sector employers that trained (equivalent to 17% of all construction sector employers) had used an FE college in the previous 12 months.

7.40 In terms of training methods, on-the-job demonstration by experienced workers is the most widely used (by 69% of those that train). Around two-fifths of those that train had staff attend courses or formal instruction, and approaching half (46%) had staff undertake self-learning using books, manuals, CD Roms and other materials. Larger employers are more likely to use each method of delivery.

Barriers to providing more training

7.41 Forty-five per cent of employers that trained over the last 12 months would like to have provided more training than they actually undertook. This varied relatively little by establishment size, though was somewhat higher among those that trained that have 100 or more direct employees (54%). The main barriers are not being able to spare staff the time off for training and a lack of funds or training being regarded as expensive. Supply-side issues are relatively rarely mentioned: 5% that would have liked to deliver more training mentioned a lack of appropriate training or qualifications and the same proportion mentioned a lack of good training providers locally.



Awareness of training initiatives

7.42 Employers were asked whether they were aware of a range of training initiatives, some of which are national, others specific to the construction sector. Levels of awareness are shown in the following table.

Awareness of training initiatives by employment size

	Direct employment size band					
	Self-employed	2 to 9	10 to 24	25 to 99	100+	All employers
Base: all employers (unweighted)	*150*	*440*	*214*	*183*	*138*	*975*
	%	%	%	%	%	%
NVQ / SVQ	83	90	93	96	97	91
Construction Skills Certification Scheme (CSCS)	62	76	84	93	91	78
National Construction College (NCC)	52	58	71	72	85	61
Site Management Safety Training Scheme (SMSTS)	48	59	60	73	78	60
Train to Gain *	43	46	57	71	84	48
Formal On-site Training and Assessment (OSAT)	28	37	46	55	72	40
Experienced Worker Practical Assessment (EWPA) *	15	22	25	39	55	24
Programme-led apprenticeships (PLAs) *	17	19	19	27	53	20
None	7	2	*	1	2	2

**England and Wales only*

7.43 Around nine in ten employers are aware of NVQs / SVQs, and over three-quarters (78%) had heard of CSCS. The majority of employers are also aware of the NCC (61%) and SMSTS (60%). Fewer than half of employers in England and Wales are aware of Train to Gain (48%).

7.44 Across all training initiatives, awareness increases with establishment size and tends to be considerably higher among the largest employers (with 100 or more employees) than the smallest (those with fewer than ten employees).

7.45 Among the self-employed the level of awareness of these initiatives was slightly lower than found among small employers, but most had heard of NVQs / SVQs (83%) and CSCS (62%), with around half aware of the NCC (52%) and SMSTS (51%).

7.46 All employers in England and Wales that were aware of Train to Gain were asked whether they had been involved with this service in the previous 12 months. One fifth stated that they had, representing 10% of all employers in England and Wales, and 17% of those that had trained in the last 12 months.

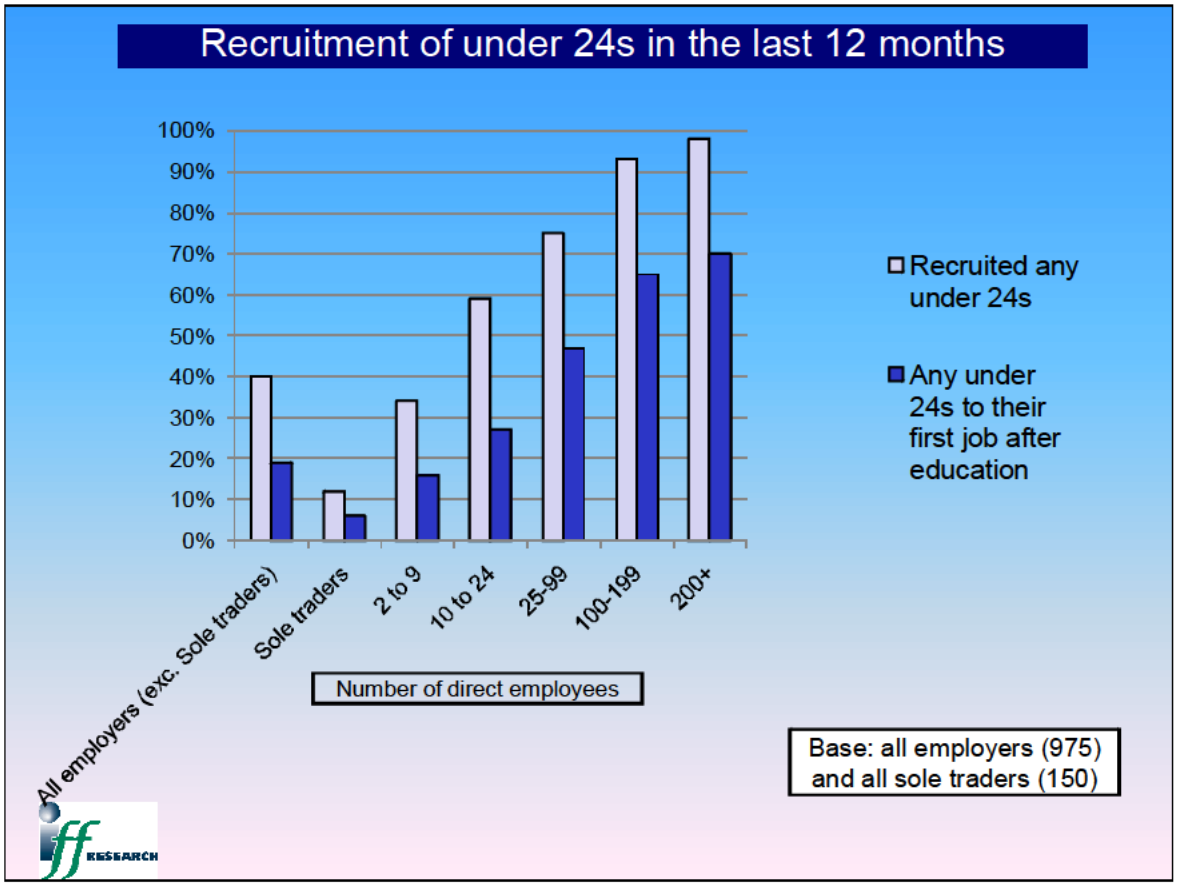
7.47 Predictably involvement was highest among large employers in England and Wales among whom two-fifths had used the service in the last 12 months (42%). This compares with 7% of those with 2-9 staff, 14% of those with 10-24 direct employees and a third of those with 25-99 staff.

8 Apprenticeships and the recruitment of young people

8.1 In this chapter we discuss the incidence of the recruitment of young people aged under 24 and views regarding their preparedness for work, and then examine the extent to which employers recruit, employ and offer Apprenticeships, and the reasons for this.

The recruitment of young people aged under 24

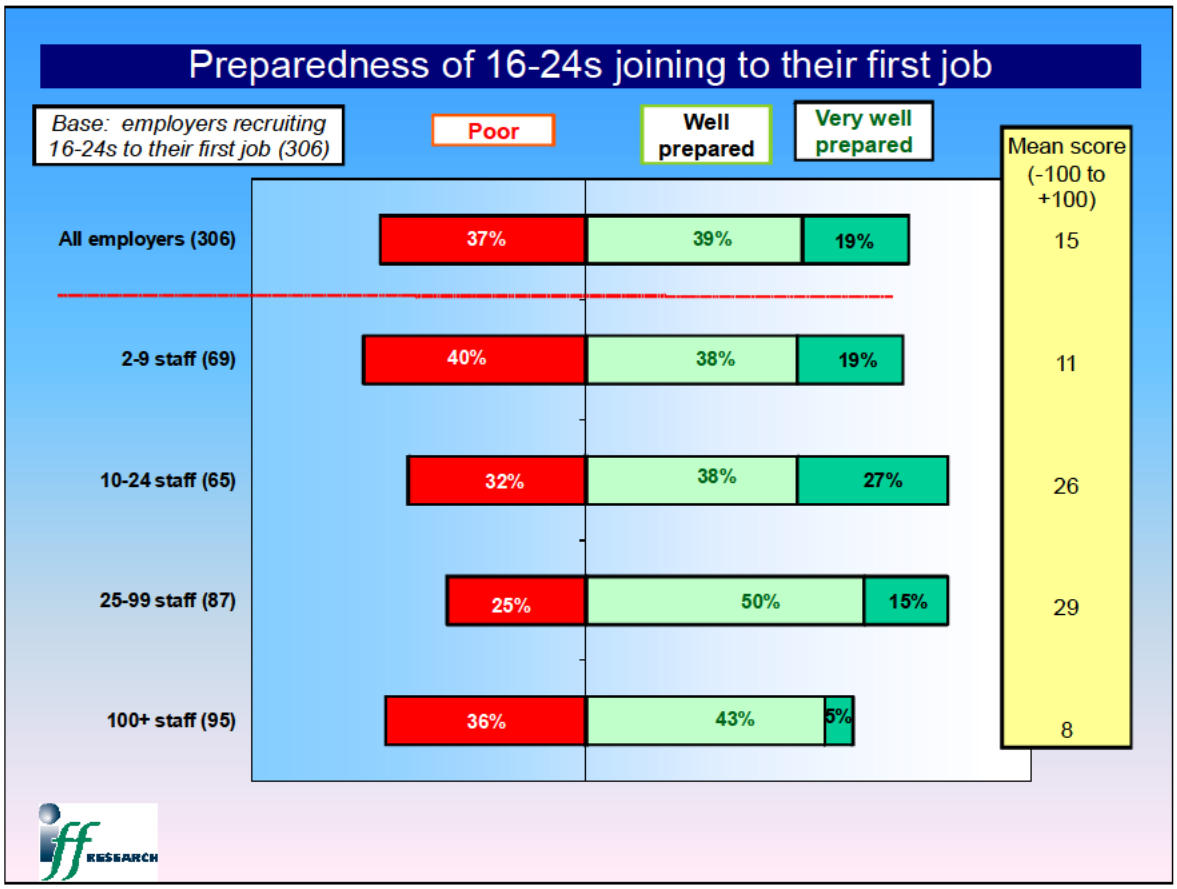
8.2 Two in five employers (40%) – and 12% of sole traders (those with only one direct employee at the time of interview) - had taken on staff aged under 24 in the last 12 months. The larger the employer the more likely they were to have taken on young people, indeed over nine in ten establishments with 100 or more direct employees had taken on staff aged under 24 in the last 12 months (95%). This is shown in the following chart, which also presents (in the right hand pair of each bars) the proportion of employers in the last 12 months taking on a young person to their first job on leaving school or college (19% overall – this is very similar to the figure of 22% reported for the construction sector in England in the National Employers Skills Survey 2007).



8.3 There were some regional variations, with employers in the West Midlands (30%), London and the South West (both 35%) less likely than average to have taken on young people and those in the Scotland and the North East most likely (47% and 48%).

8.4 A key area of interest in regard to the recruitment of young people is the extent to which those entering their first job on leaving education are perceived by employers as being well prepared for work. Almost three in five of those taking on young people to their first job after school or college think they have been well prepared (58%), but almost two in five (37%) think they were poorly prepared for work, and one in eight (12%) describe the young people they have taken on as very poorly prepared.

8.5 Results are summarised on the following chart – results do not add to 100% since those answering *don't know* or *it varies too much to say* (5% overall) have not been shown. Mean scores are also presented, with scores having been allocated as follows: very well prepared +100, well prepared +50, poorly prepared -50 and very poorly prepared -100. As a note results among sole traders / the self-employed are not included since only 6 such respondents had taken 16-24s to their first job post-education in the last 12 months.



8.6 Establishments with 10 to 99 staff are the most positive about the young recruits they have taken to their first job. For those with 2-9 staff and those with 100 or more staff, on the other hand, the balance of opinion as shown by the mean scores is only just positive.

8.7 Base sizes by region are low and hence caution is needed but employers in the East Midlands were markedly more negative than average: among the 30 respondents recruiting a 16-24 year old to their first job on leaving education in the last 12 months, two thirds thought they had been poorly prepared (65%) compared with a third thinking them well prepared (35%; a mean score of -20).

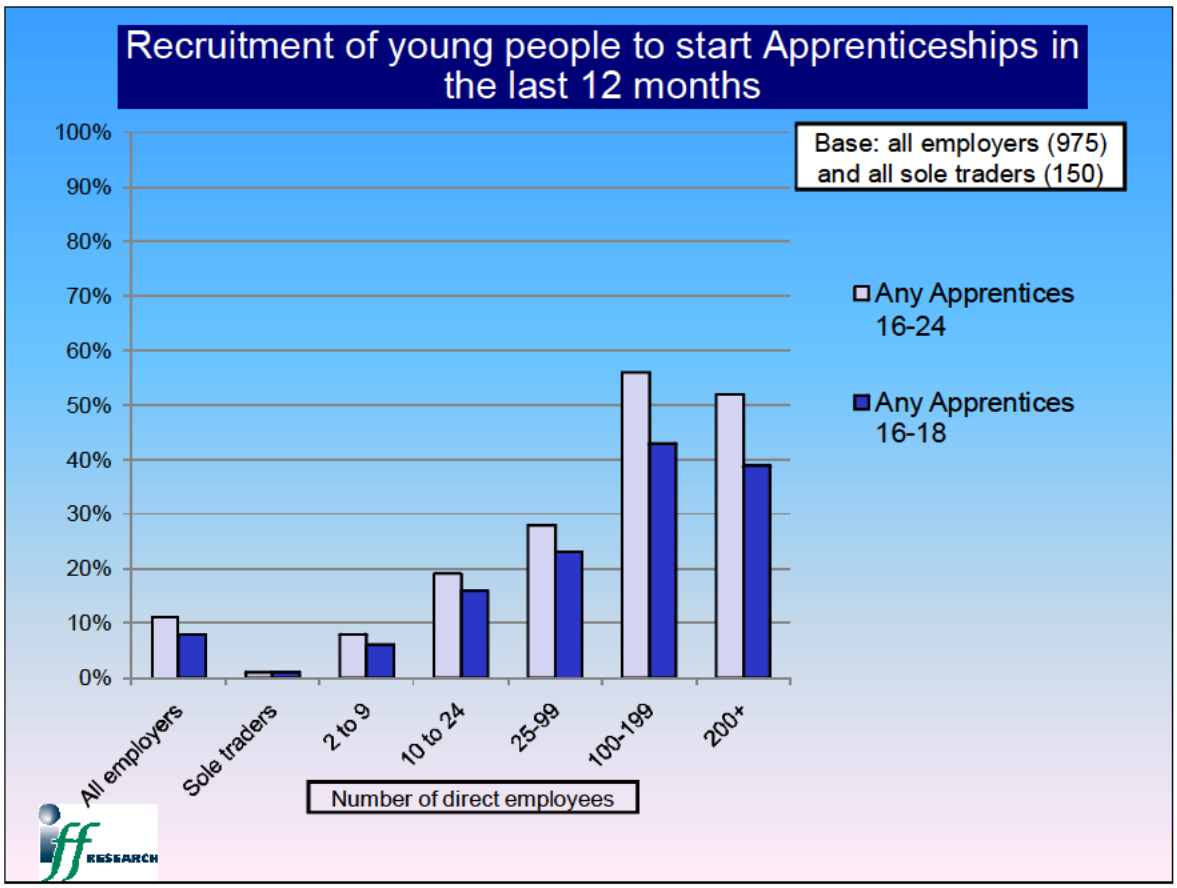
8.8 Overall 100 respondents felt that the young people they had taken on to their first job on leaving education in the last 12 months had been poorly prepared for work. Poor attitude and a lack of basic education (including poor numeracy and literacy) were the most common criticisms, though others seemed to feel these recruits should have had better basic practical skills. Results are summarised in the following table – results add to over 100% since employers could give more than one response. Of specific skills lacking communication, social / people skills and timekeeping were quite often mentioned, as shown in the following table.

Ways in which young recruits have been poorly prepared for work	
Base: employers taking on poorly prepared young people to their first job post-education (100)	%
Poor attitude	42
Basic education (literacy, numeracy, common sense)	34
Technical / practical skills (including basic construction skills)	26
Lack of (life) experience / experience of work	20
Communication skills	18
Social / people skills	13
Timekeeping skills	8
Don't know	4

Recruitment of Apprentices

8.9 Those employers that had recruited 16-24 year olds in the last 12 months were asked how many young people they had recruited to start an Apprenticeship or Advanced Apprenticeship (in Scotland employers were asked about Modern Apprenticeships). To ensure that employers were referring to formal Apprenticeships, rather than informal apprenticeships delivered solely on-the-job which are quite common in the industry, the Apprenticeships were specified as being those where the employer or a training provider received government funding.

8.10 Overall 11% of all employers had recruited a young person aged 16-24 to start an Apprenticeship in the last 12 months, as had 1% of sole traders / the self-employed. Predictably this increases with size of employer, and over half of firms with 100 or more direct employees had taken on someone to start an Apprenticeship in the previous 12 months (55%). Respondents were also asked about their recruitment of 16-18 year olds to start an Apprenticeship: 1% of the sole traders and 8% of all employers had taken on a 16-18 year old Apprentice in the last 12 months, rising to 41% of those with 100 or more direct employees. Results are summarised in the following chart.



8.11 Results are very similar to those found for the construction sector in the National Employers Skills Survey 2007: for that study 10% of employers in England reported recruiting any apprentices aged 16-24 in the previous 12 months and 7% reported taking on apprentices aged 16-18. These are exactly the proportions found for the current survey among employers in England.

8.12 Employers in Scotland were more likely to have taken on young people to start Apprenticeships than average: one in five had taken on a 16-24 year old (21%) as an Apprentice and only slightly fewer had taken on a 16-18 year old (17%). Employers in the North East were also more likely than average to have taken on an Apprentice aged 16-24 in the last 12 months (16%): in all other regions / countries the figure was 7% - 12%.

8.13 It was particularly noticeable that employers reporting skill gaps in their workforce were far more likely than others to have recruited Apprentices (24% v. 8% respectively), suggesting such recruitment is often a way to meet skill shortages (we look later in the chapter at the reasons for offering Apprenticeships).

8.14 Half of those taking on Apprentices aged 16 to 24 over the last 12 months took on just one (56%), almost a third took on 2-3 (31%), leaving around one in eight (13%) taking on four or more.

8.15 As the following table shows, small establishments with 2-9 (direct or indirect) staff shoulder more of the responsibility for the recruitment of Apprentices than large firms. The survey results suggest that those with fewer than 10 staff account for 18% of all employment yet take on 26% of Apprentices. On the other hand those with 100 or more staff in total account for a much lower share of Apprentices recruited (25%) than total employment (34%).

Proportion of Apprentices aged 16 – 24 recruited in the last 12 months by size of establishment

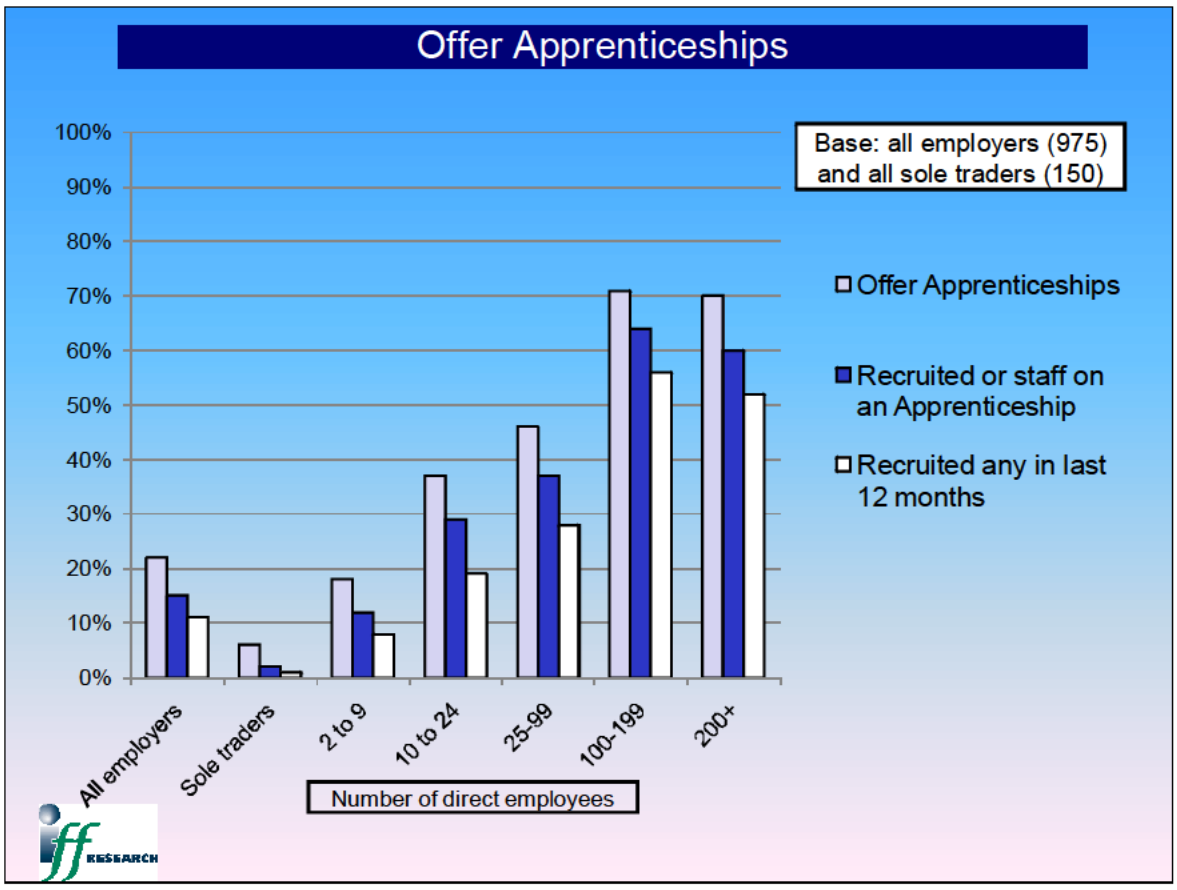
Base: all	% of total Apprentices recruited	% of all employment (direct and indirect)
2-9 total staff	26%	18%
10-24 total staff	22%	19%
25-99 total staff	27%	28%
100+ total staff	25%	34%

8.16 Survey results suggest that in numeric terms Apprentices aged 16-18 account for just over three-fifths (62%) of the total 16-24 Apprentice cohort.

Offering Apprenticeships

8.17 Results so far have discussed the recruitment of Apprentices in the previous 12 months. Clearly it is possible to have staff undertaking Apprenticeships despite not having recently recruited any, and also to offer Apprenticeships despite not having staff currently undertaking such training. Overall 15% of all employers had recruited any Apprentices in the last 12 months or had staff currently undertaking an Apprenticeship, and 22% of all employers indicated that they offered Apprenticeships. The proportion offering apprenticeships is slightly higher than found for construction sector employers in the National Employers Skills Survey 2007 (19% - the best comparison in the current survey is 21% among employers in England).

8.18 As with the recruitment of Apprenticeships, the proportion that offer Apprenticeships increases with size, as shown by the left hand bar of each group of three on the following table. The middle bar shows the proportion saying they have either recruited Apprentices in the last 12 months or have staff currently undertaking an Apprenticeship.



8.19 Results suggest that a higher proportion of employers in Scotland (41%), the North East (33%) and the North West (29%) offer Apprentices. In most other regions / countries the figure was in the 16% - 20% range.

8.20 Respondents offering Apprenticeships (a base of 341) were asked why they offered them. The following table summarises results.

Why offer Apprenticeships (spontaneous)	
Base: all offering apprenticeships (341)	%
We can train them in or own way of doing things	33
Training the workforce of the future	32
Because we find it difficult to recruit skilled staff we need / staff lack skills	19
Need young workers in an ageing workforce	14
Helps recruitment / makes us more appealing to potential recruits	8
It's the way the respondent trained / got their opportunity	8
To give young people a start	7
Gives us free / cheap trial of staff	4
I get funding if I offer them	3
Mutually beneficial	2
Give something back to the community	2
Other	5
Don't know / no particular reason	3

8.21 Most employers offer Apprentices to train the workforce of the future (32%) and to be able to mould this workforce in the company way of doing things (33%). Some specifically say it is a response to difficulties recruiting the skilled staff they need or that existing staff lack skills (19%): this rises to 27% among those reporting current skill-shortage vacancies but is no higher among those with current skill gaps suggesting this response is more to do with recruitment difficulties than skill shortages among their workforce.

8.22 Although broadly similar, there is a slightly different emphasis for the reasons for involvement with Apprenticeships between small and larger employers. Employers with 25 or more staff are more likely to give their reason as training the workforce of the future (43% compared with 30% of smaller employers), whereas smaller employers are more likely to emphasise it enabling them to train the young people in their own way of doing things (39% compared with 26% of those with 25 or more staff). The largest employers with 200 or more staff were significantly more likely than average to say they offer Apprenticeships because they need young workers due to an ageing workforce (34%).

8.23 We have seen that the majority of employers do not offer Apprenticeships. The main reasons these employers give why this is the case are listed on the following table. It can be seen that there is a long list of reasons, without any one reason dominating. The most common response, mentioned by 14%, was that all their staff are fully trained and hence none needed Apprenticeship training, indicating that these employers think very much in terms of their existing workforce rather than expansion. It is interesting that around one in ten (9%) indicated that their staff did not need to be that highly skilled, suggesting they use mainly unskilled labourers.

8.24 Most answers point to Apprenticeships not being felt to be relevant for their type of organisation, at least in their current circumstances, for example because they have a fully qualified workforce, they are too small, they are not looking to recruit or staff in their organisation do not have to be qualified. Some of these responses imply that if circumstances changed they might be willing to consider Apprentices. A small number also suggest potential interest but say Apprenticeships do not exist for their particular specialism within Construction (7%) or say young people have not applied to job adverts (3%). Others however, appear not to like the idea of taking on Apprentice, for example preferring to take on qualified staff (6%) or older workers (4%).

Reasons for not offering Apprenticeships (spontaneous)	
Base: all employers not offering apprenticeships (613)	%
All our staff fully trained	14
Staff don't need to be that highly skilled	9
Not worth my time for the money we get	8
We are too small	8
No Apprenticeships in our sector / specialism	7
Not relevant to our business / not necessary / we don't need them	6
We prefer to recruit fully trained staff	6
Don't know enough about them	6
Bad previous experiences with Apprentices	5
Not enough work to justify taking one on	5
Haven't got the time	5
We don't take on young people	4
Financial constraints / have not got the time	4
Don't know	9
Other reasons: we only use sub-contract staff (3%), no young people have applied (3%), not recruiting any staff (3%), we prefer to train in-house (2%), paperwork/bureaucracy (1%), new business / not been trading long (1%), about to retire (1%).	

8.25 Results suggest that a variety of messages are required to help persuade employers to offer Apprenticeships, but generally continued information about what they entail would be beneficial – 6% of those not offering Apprenticeships say part of the reason is not knowing enough about them.

9 Conclusions

9.1 The survey has shown that:

- Skills shortages in the labour market are common in the construction industry (12% of employers say they lacked the skilled workers they required for all or most of the previous 12 months, and three in ten employers experienced recruitment difficulties for skilled staff in the last 12 months)

- Skills shortages in the labour market have serious implications (for example half suffering recruitment difficulties say it has led to increased operating costs and the same proportion have lost business or turned work down as a result of lacking skills).

9.2 Skill gaps within the existing workforce are less common (17% of employers say they have staff that are not fully proficient, and overall 6% of the directly employed labour force are described as lacking proficiency) but, like skill shortages when recruiting, have serious implications.

9.3 While the primary concern that employers have in terms of business prospects is the level of and uncertainty about demand, labour shortages are felt to be a limiting factor for the coming 12 months by around one in twelve employers, putting it on a par with such factors as the availability of finance, and high and rising costs.

9.4 Throughout the study, there are relatively large differences by size of employer. Large employers (those with 100 or more staff at the site) have a higher than average proportion of directly employed staff lacking proficiency (8%) and also train a higher than average proportion of their staff. Although they are more likely to offer Apprenticeships and to actually recruit apprentices, in numeric terms they take on a lower proportion of all apprentices (25%) than their share of total employment (34%). The reverse is true for the smallest establishments with fewer than 10 staff, which account for around a quarter of total recruitment of apprentices (26%) but less than a fifth of total employment (18%). This is as found sector-wide in the National Employers Skills Survey 2007 (NESS 2007).

9.5 Generally speaking results for the current survey among employers quite closely match those found for NESS 2007 among construction sector employers in England. Comparable results have been discussed throughout the report.

9.6 The NESS survey does not cover sole traders or the self-employed. Results among this group for the current survey has showed they generally 'continue' the pattern found among employers whereby on such measures as awareness of training initiatives, the incidence of skills gaps and the incidence of training decreases with the size of employer. Hence on these and other measures the figure among the self-employed are nearly always lower than found among micro employers. One important point to note though is that because of the sheer number of sole traders and self-employed in the industry, and because a relatively large proportion of sole traders admit to lacking skills (14%), the survey results suggest that there are far more sole traders and self-employed with skill gaps (some 125,000) than there are directly employed staff described by employers as lacking skills (c. 75,000).

9.7 More detailed, construction-specific occupational data was also collected for the current survey than is available through NESS 2007. These have been discussed throughout the report in relation to:

- Hard-to-fill vacancies (these were most commonly reported by employers for carpenters / joiners, followed by operatives, general labourers and managers)
- Skill gaps (in density terms most commonly found for scaffolders, carpenters / joiners, plasterers and general labourers)
- Off-the-job training (in volume terms managers and general labourers are the most likely to receive off-the-job training, though the proportion of staff trained off-the-job was highest for construction operatives, bricklayers and roofers)
- On-the-job training (in volume terms general labourers and managers are again the most likely to receive on-the-job training, though the proportion receiving such training was highest for bricklayers and carpenters / joiners)

9.8 Relatively low base sizes restrict the scope for reliable country and regional analysis, but the results *suggest* some degree of geographic variation:

- Employers in Scotland were more likely than average to encounter recruitment difficulties for skilled staff, to train staff and to have taken on an apprentice in the last 12 months (the latter was also true for those in the North East).
- Employers in London have a higher than average proportion of (directly employed) staff lacking skills.