Employers Panel 2005

Results from Wave 1

MAIN REPORT

Customer Research Strategy – Report 8

Llywodraeth Cynulliad Cymru
Welsh Assembly Government

EMPLOYERS PANEL 2005

GfK NOP

GfK NOP is the UK part of the GfK Group which is one of the top 4 market research organisations world-wide. GfK NOP is based in the UK and employs around 600 staff and it is split into specialist divisions.

The team working on the Employers Panel is in the division that specialises in Social Research and there are 30 researchers dedicated to this field. The team has relevant experience of both large-scale social research surveys and of carrying out customer satisfaction research.

CONTENTS

This report forms part of a programme of customer research originally commissioned by ELWa. ELWa was the statutory body responsible for planning, funding, promoting and widening access to post 16 education and training in Wales (excluding Higher Education). Since April 2006, these functions transferred to the Department for Education, Lifelong Learning and Skills within the Welsh Assembly Government.

1.0 INTRODUCTION AND METHODOLOGY

ELWa was the Assembly Sponsored Public Body established in 2001 under the Learning and Skills Act 2000, and it had responsibility for planning, funding and promoting post 16 learning provision in Wales with the exception of Higher Education. On 1 April 2006 ELWa merged into the Welsh Assembly Government (WAG). Its research and evaluation activities have been subsumed within the Department for Education, Lifelong Learning and Skills (DELLS), and extended to encompass all lifelong learning.

This first survey from the Employer Panel formed part of the Customer Research Strategy, which was part of the overall drive within to:

- Encourage evidence based policy and demand led planning
- Bring the customer centre stage

The Customer Research Strategy itself encompasses three main strands of activity:

- Understanding what motivates customers to learn in order to widen and deepen participation in learning
- Understanding what customers think of the education and learning services they receive
- Tracking and understanding participation within the customer groups (individuals, businesses and communities)

The Employer Panel survey covers the third of these strands. Other work that has already taken place under the Customer Research Strategy, is in Table 1.

GfK NOP recommended the use of an Employer Panel as part of the Customer Research Strategy to track establishments' views on a longitudinal basis, and to provide a source of establishments on whom ELWa (now WAG) may call at regular intervals in order to investigate topical issues relating to learning and training.

1.1 Aims

The key aims of the Employer Panel are:

- To complement the employer research completed as part of the Future Skills Wales research series, and to maintain comparability, where possible, with this research for analysis purposes
- To test the business typologies identified by the Employer Case Studies 2004 research, in order that this may be further refined as necessary
- To ask employers core questions every wave, in order that attitudes/behaviours may be tracked over time. Core questions will relate to:
  - Motivation to learn
  - Engagement with learning
  - Views of products and support made available by the public sector in terms of access and level of engagement
  - Future business plans (with a particular interest in growth)
  - To talk to businesses at an establishment level (i.e. any site where employees are based, including head office of multi-site establishments, local/regional sites and sites of single unit enterprises).

1.2 Reporting conventions

Throughout the report, the following conventions are used within charts and tables:

* denotes a figure less than 0.5% but greater than zero

** denotes a small base (unweighted base less than 100)

– denotes zero

Some figures in the charts and tables may not add to 100% due to rounding. In cases where answers add to more than 100% because multiple responses were allowed, a note has been provided.

Table 1: Summary of Customer Research Strategy

Research Exercise	Aims
National Learner Satisfaction Survey for Wales 2003	A telephone survey of 6,000 learners in Further Education (FE), Work Based Learning (WBL) and accredited Adult Community Education (ACE) enabled ELWa to obtained measures of learner satisfaction in ELWa-funded provision across Wales, and established benchmarks which, when tracked over time, will show trends in learner satisfaction.
National School Sixth Form Survey for Wales 2004	An extension of the National Learner Satisfaction Survey 2003 which examined the views of school sixth formers and satisfaction with their learning experience. 12 focus groups were undertaken across 8 schools in Wales and self-completion questionnaires sent to all participating schools to understand what motivates sixth formers to learn and their satisfaction with the learning process.
Individuals' Panel	A face to face survey of the general population in Wales. In the first wave 2009 interviews were completed. In wave 2 1309 of the original sample members were re-interviewed. These surveys obtained information on, and tracked changes over time, for/the types of learning being undertaken; and the respondents' motivations for learning.
Employer Case Studies	28 individual case studies were undertaken amongst a range of establishments across Wales, to understand: what learning was being undertaken by employers; and how to encourage employers to engage in learning, and offer it more widely across their workforce. In-depth interviews were carried out with owner/directors; and in larger establishments interviews were carried out with line managers, whilst self-completion questionnaires were distributed for employees to complete.



Table 2: SIC Classification versus naming conventions in this report

SIC 2003 classification	Summary Name
Agriculture, Hunting and Forestry, Fishing and Mining and Quarrying	Agriculture/mining/quarrying
Manufacturing and Construction	Manufacturing/construction
Electricity, Gas and Water Supply, Transport, Storage and Communication	Utility
Wholesale and Retail Trade, Repair of Motor Vehicles, Motorcycles and Personal and Household Goods, Hotels and Restaurants	Wholesale/retail/hotels/restaurants
Financial Intermediation, Real Estate, Renting and Business Activities	Finance/businesses services
Public Administration and Defence, Compulsory Social Security, Education and Health and Social Work	Public administration

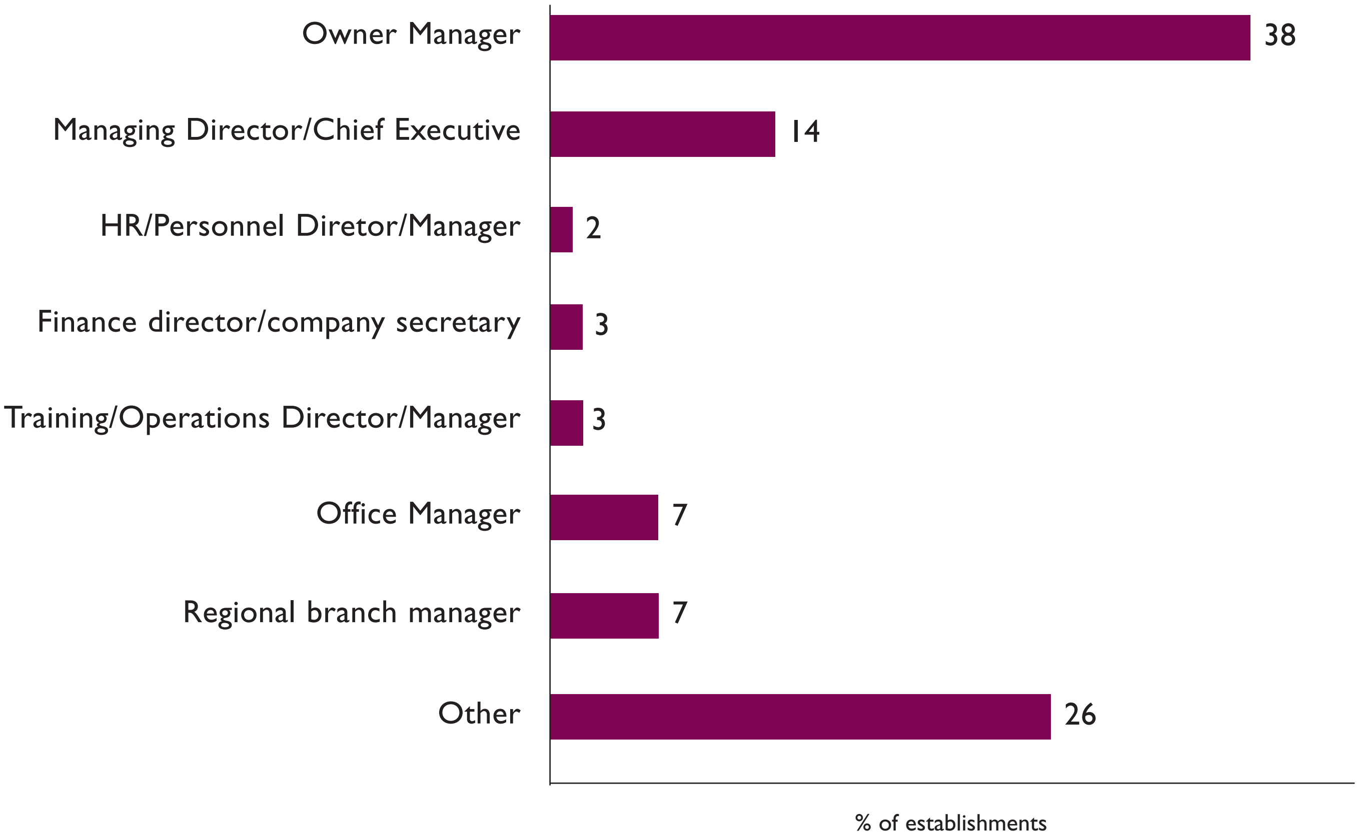
The report makes a number of references to the industry sectors that the establishments operate within. The sectors have been grouped together to ensure that the data for each group was robust enough to allow sub group analysis to be carried out. These groupings were based on the Standard Industry Classification and similar industries were combined. The group headings in Standard Industry Classification have been abbreviated throughout this report for ease of use. Table 2 displays the SIC 2003 classification set against the name the sector was given in this report.

1.3 Methodology and sampling

1.3.1 Interview length, eligibility and respondent

The Employer Panel Survey 2005 was carried out via a telephone interview with 2,059 respondents at their place of work, lasting on average 20 minutes. In terms of eligibility, establishments had to be sited in Wales (they could either be single site, a head office or one site of a multi site organisation) and also had to have two or more employees (including the respondent). All of the respondents agreed to become a member of the panel before the interview was conducted. Interviewing took place between March 2005 and May 2005. The interviewers were briefed to ask for the owner/manager of smaller establishments or human resource managers in the larger establishments. Every interview was conducted with a middle to senior-level manager/director with responsibility for training all staff at that particular site. Chart 1 gives the full breakdown of respondents:

Chart 1: Job title of respondent



A much higher proportion of interviews were carried out with owner/managers in agriculture/mining/quarrying (58%) and also wholesale/retail/hotels/restaurants (56%). In terms of size, as might be expected, the highest proportion of interviews with owner/managers were within the smallest establishments (44% of all interviews in the 2-9 employee size band).

1.3.2 Quotas

Interlocking quotas were agreed relating to size and sector (i.e. within an industry sector, quotas were set for achieving interviews by different sizes of establishment, in terms of the numbers employed at that site). The quotas were arranged according to the sample available from Experian (the sample frame used for the survey) and the predicted response rates for interview. Response rates were lower than would be anticipated from a standard survey due to the fact that in order to participate, the respondent had to agree to enter the panel and therefore be contacted in future waves. This is a significantly larger undertaking than being involved in an ad-hoc exercise. There were no quotas set for regional representation across Wales.

Data were weighted to the Inter Departmental Business Register (IDBR) count of business population 2004. Table 4 gives the number of interviews by size and sector based on weighted figures (the data was adjusted, to ensure the profile of the establishments was representative of Wales).



Table 3: Job title of respondent by sector and size of establishment

Base: All respondents	Total	Sector						Size of establishment (number of employees)		
		Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	0-24	25 plus
Unweighted	2,059	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%
Owner/Manager	38	58	27	37	56	25	25	44	23	8
MD/Chief Executive	14	5	20	14	11	24	8	15	14	10
Office Manager	7	3	10	10	4	13	5	7	8	7
Regional/Branch Manager	7	3	3	9	9	6	7	6	11	10
Finance Director/ Company Secretary	3	*	7	4	1	3	2	3	3	3
Training/Operations Director/Manager	3	1	2	3	2	4	5	2	5	8
HR/Personnel Director/Manager	2	-	5	1	2	2	2	1	1	13

Note: Single response question. Overall responses of 2% plus shown. 'Don't know' and 'Other' not shown.
* denotes less than 0.5 but greater than zero. – denotes zero.

Table 4: Weighted data: size within sector

		Sector					
Base: All respondents	Total	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration
Unweighted	2,059	196	393	253	446	352	419
Weighted	2,059	63	312	86	729	386	482
	%	%	%	%	%	%	%
2-4	39	83	42	39	42	48	20
5-9	35	8	29	33	37	36	41
10-24	17	4	14	14	16	12	25
24-59	4	2	6	7	3	2	5
50 plus	5	3	8	8	3	3	8

By region, interviews were achieved as follows:

North Wales (489 unweighted, 468 weighted)
Mid Wales (280 unweighted, 291 weighted)
South East Wales (760 unweighted, 797 weighted)
South West Wales (441 unweighted, 436 weighted)

Please note that 'unweighted' means that no adjustment has been made to data in order to ensure it is representative of the profile of establishments in Wales.

1.4 Pilot Survey

A pilot survey was conducted to test the questionnaire for clarity, flow and length.

Overall 20 pilot interviews were conducted. Only minor changes were required to the questionnaire as a result.

1.4.1 Welsh Interviews

Respondents were asked at the beginning of the interview whether they would prefer their interview to be conducted in Welsh. In total 12 interviews were completed in Welsh.

1.5 Response rates

Tables 5 and 6 provide detail on the response rates.

Valid response rate

$$\frac{\text{Achieved interviews (1,226)}}{\text{Total valid sample}} \times 100 = 50\%$$



Table 5: Number of interviews achieved per sector

Base: All respondents	No of employees	Target Number of interviews	Total English interviews	Total Welsh Interviews	Total Interviews
Agriculture, hunting and fishing and mining and quarrying	2 to 9	180	179	1	180
	10 to 49		16	0	16
	50+	20	4	0	4
Manufacturing, Construction	2 to 9	160	163	0	163
	10 to 49	150	166	0	166
	50+	80	78	0	78
Electricity, gas and water supply, Transport, storage and communications	2 to 9	160	159	2	161
	10 to 49		84	1	85
	50+	120	28	0	28
Wholesale and retail, Hotels and restaurant	2 to 9	160	160	0	160
	10 to 49	150	157	0	157
	50+	80	80	0	80
Financial and business services	2 to 9	160	162	0	162
	10 to 49	150	150	0	150
	50+	40	43	0	43
Public administration and defence, education and health	2 to 9	160	155	6	161
	10 to 49	150	150	2	152
	50+	80	81	0	81

Table 6: Sample outcomes

	Number	%
Total sample drawn	**5,472**	**100**
Valid:		
Total achieved interviews	1,226	22
Refusals	268	5
Panellist refused to take part again	93	2
Appointments made	776	14
Quit/others can’t continue	73	1
Reached max number of calls	9	*
Stopped interviews	2	*
Ineligible/not required:		
Line busy	68	1
No reply/answerphone	452	8
Number not recognised/out of service	285	5
Don’t know number of employees/sector	2	*
Company no longer exists	26	*
Residential number	15	*
Not available during fieldwork period	65	1
Duplicate number	19	*
Wrong number	6	*
Panellist no longer eligible	1	*
No eligible respondent	156	3
Unattempted	1930	35
Total valid sample:	**2,447**	**%**
Achieved interviews	1,226	50
Refusals	268	11
Panellist refused to take part again	93	4
Appointment made	776	32
Quit/stopped interviews/others can’t continue	73	3
Reached max number of calls	9	*
Stopped interviews	2	*

2.0 OVERVIEW OF ESTABLISHMENTS INTERVIEWED



2.1 Size and sector of establishments

Respondents were asked how many employees (both full and part time) they had at that particular site. Nearly three quarters of the establishments interviewed (74%) had between 2 and 9 employees at the site. Nearly two in ten (17%) had between 10 and 24 employees and one in ten (10%) had 25 employees plus.

All regions were significantly more likely than North Wales to have establishments with 2 to 4 employees. The establishments with between 2 and 4 employees were more predominant in the agricultural sector. Public sector establishments were most likely to have 10 plus employees. Establishments in the public administration and manufacturing/construction sectors had a significantly higher mean number of employees than the average.

Table 7: Number of full and part time employees at site by region and sector

		Region				Sector					
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419
Weighted	2,059	468	291	797	436	63	312	86	729	386	482
	%	%	%	%	%	%	%	%	%	%	%
2 to 4	39	30	45	43	41	83	42	39	42	48	20
5 to 9	35	40	36	32	35	8	29	33	37	36	41
10 to 24	17	21	12	16	16	4	14	14	16	12	25
25 to 49	4	5	4	4	3	2	6	7	3	2	5
50 plus	5	5	3	5	4	3	8	8	3	3	8
Mean number of employees	15	16	12	14	13	7	20	16	11	11	21

Note: respondents were given the definition of part time as being between 8 and 31 hours per week.
'Don't know' not allowed in interview (ranges were given and accepted as alternative response). Single response question.

2.2 Nature and type of establishments

Just under two thirds (65%) of the establishments interviewed were a single site organisation, with a further quarter (27%) being part of multiple sites but not the head office. Just under one in ten (8%) described themselves as the head office of a multi-site establishment. In terms of analysis by sub group:

- establishments in North Wales were significantly less likely than all the other regions to be single site (57% of establishments in North Wales were single site)
- the agriculture/mining/quarrying sector was predominantly single site and more likely than any other sector to be so (81%)
- establishments that had 25 plus employees were significantly less likely to be a single site and more likely to be head office of multi-site establishments or one of multiple sites

Table 8: Nature of establishment by region, sector and size

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Single site	65	57	68	66	73	81	72	62	65	64	60	72	50	34
Head office of multi-site establishment	8	11	7	9	5	9	15	9	6	7	9	6	13	20
One of multiple sites but not head office of multi-site establishment	27	32	24	25	22	10	14	29	29	29	31	22	37	45

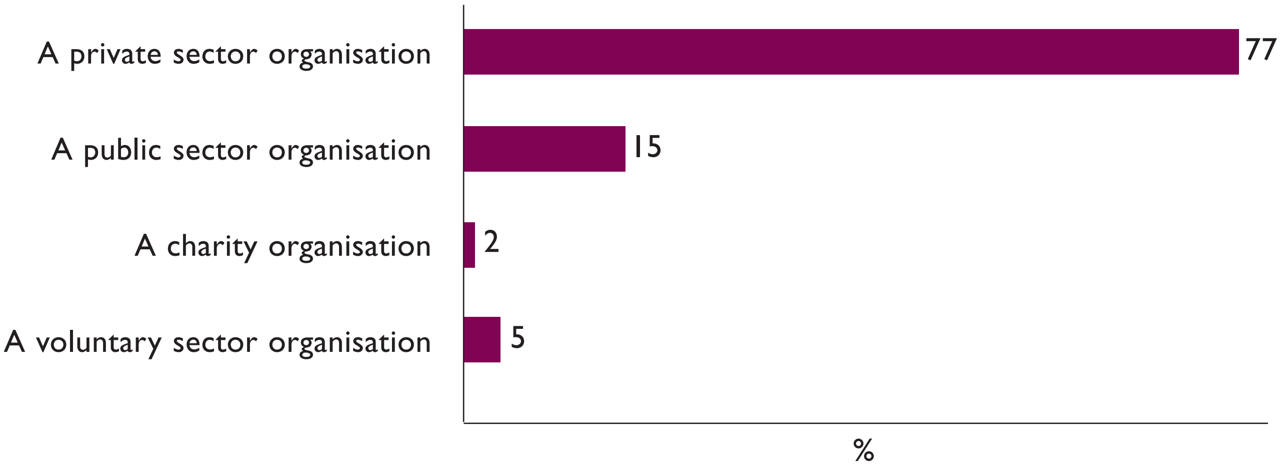
Note: Single response question. 'Don't know' and 'Other' responses not shown.

The majority (77%) of establishments interviewed were private sector establishments, however a further one in seven (15%) indicated they were public sector establishments. It is worth noting that private sector establishments were significantly more likely to be based at a single site (84%) than, alternatively, to be one of multiple sites (63%) or the head office of a multi-site establishment (73%).

2.3 Ownership

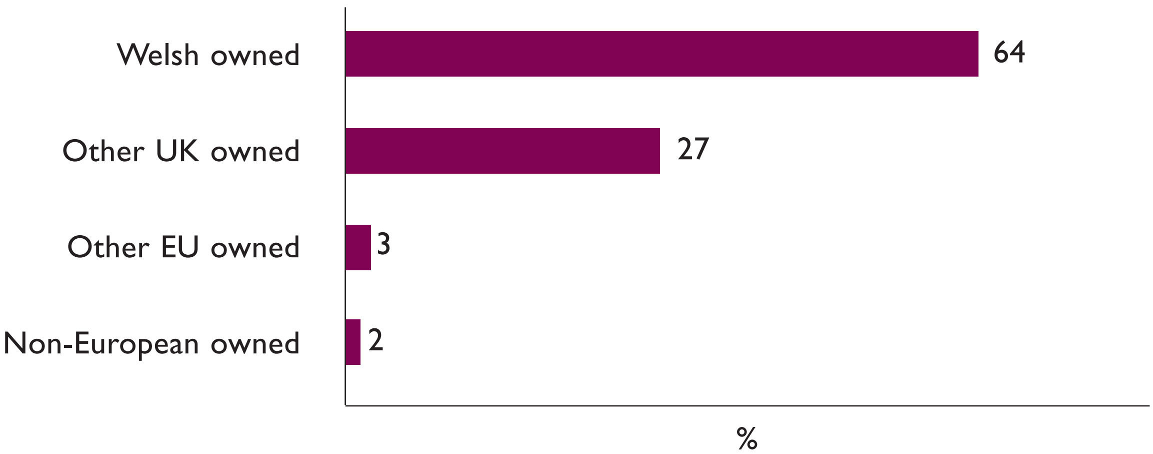
Almost two thirds (64%) of private sector establishments in the panel were Welsh owned, whilst more than a quarter (27%) were owned by an organisation within the UK but outside Wales. A total of 5% were owned by EU or Non-EU establishments.

Chart 2: Type of organisation



Base: All respondents (unweighted/weighted 2,059). Single response question. 'Other' and 'Don't know' responses not shown.

Chart 3: Ownership of organisation



Base: All private sector establishments (unweighted 1,582 weighted 1,589). Single response question. 'Don't know' and 'not stated' responses not shown in chart.

It is worth noting that private sector establishments in the panel that were based in North Wales (53%) were significantly less likely to be Welsh owned than those in all other regions. Establishments with over 25 employees were least likely to be Welsh owned and significantly more likely to be owned by UK establishments outside of Wales. In terms of sector, the vast majority (85%) of establishments in agriculture/mining/quarrying were Welsh owned. This reflects their profile of being mainly single site establishments with fewer than 10 employees.

A significantly higher than average proportion of manufacturing and construction establishments were also Welsh owned (71%). The highest incidence of other UK owned establishments fell in the retail/wholesale/ hotels/restaurants sector (32%) and the highest incidence of EU ownership was within the utilities sector (6%).

Table 9: Ownership of establishment by region, sector and size

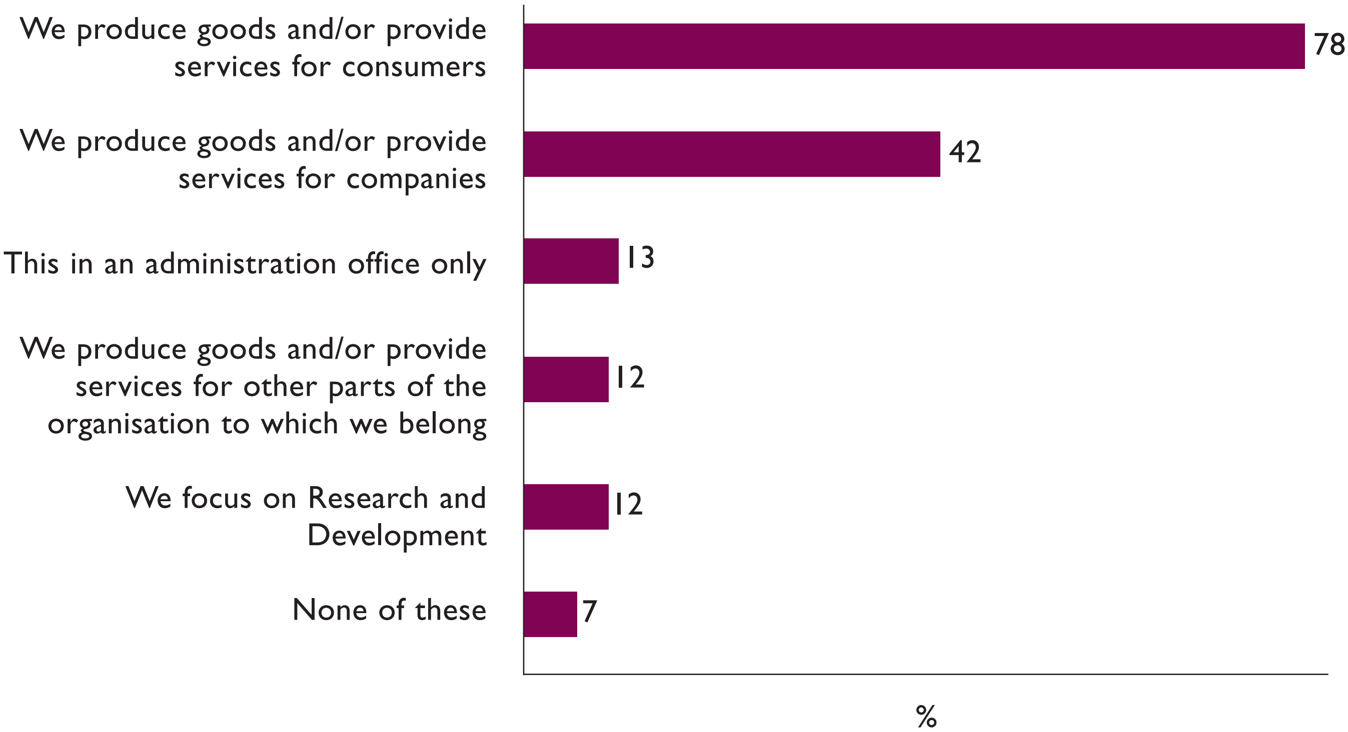
		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1582	364	216	578	352	191	353	201	363	308	166	829	424	329
Weighted	1589	339	229	621	346	62	287	69	627	350	194	1248	222	118
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Welsh owned	64	53	65	66	73	85	71	67	57	67	65	67	62	40
Other UK owned	27	36	31	23	20	13	22	23	32	28	23	26	27	41
Other EU owned	2	3	1	3	1	–	2	6	4	1	*	2	4	6
Non EU owned	2	2	*	3	2	2	1	1	3	2	3	2	2	3
'Don't Know' /Not stated	4	6	2	5	3	1	5	3	5	2	7	3	5	10

Note: Single response only. * denotes less than 0.5% but greater than zero. – denotes zero.

2.4 Activites undertaken at establishment

All private sector establishments were asked what activities were undertaken at that site. Nearly eight in ten (78%) indicated that they produced goods and/or provided services for consumers, with just over four in ten (42%) producing goods and/or providing services for other establishments. A smaller proportion of establishments reported that they produced goods and/or provided services for other parts of the organisation to which they belonged (12%) they focussed on research and development (12%) or were an administration office only (13%).

Chart 4: Activity undertaken at establishment



Base: All private sector establishments (unweighted 1582 weighted 1589).
Multiple response question. 'Don't know' and 'Other' not shown.

2.5 Geographic source of business

The majority of establishments which either produced goods and/or provided services solely for consumers indicated that the majority of their customers came from within Wales – on average 81% of their business came from within a 25 mile radius, with a further 11% from elsewhere in Wales. A further 7% of business came from within the UK. Only an average of 1% of their business came from outside the UK.

Amongst establishments which produced goods and/or services to other companies only, under a half (43%) of their business was carried out within a 25 mile radius of them, with 20% received from elsewhere in Wales. An average of 29% of business came from elsewhere in the UK. The remaining 7% of business for this group of establishments came from outside the UK.

For those that produced goods and/or services for companies and consumers, a large proportion of business came from within a 25 mile radius of their site (67%). An average of 16% of their business came from elsewhere in Wales or from elsewhere in the UK (14%). Only 2% of their business came from outside the UK.

Table 10: Geographic distribution of respondents business

Base: All who know the geographic distribution of their customer base	Establishments producing goods and/or providing services to customers only	Establishments producing goods and/or providing services to other companies only	Establishments producing goods and/or providing services to other companies and customers
Base unweighted	583	229	493
Base weighted	713	182	438
	%	%	%
Within a 25 mile radius	81	43	67
Elsewhere in Wales	11	20	16
Elsewhere in UK	7	29	14
Elsewhere in EU	1	4	1
Elsewhere in the world	1	4	1

Note: average proportions given for each area. Multiple response accepted per geographic area.



2.6 Growing establishments: growth in turnover/financial budget

All establishments interviewed were asked for an estimate of their turnover (for private sector establishments) or financial budget (for public sector establishments) at that particular location for the last financial year (April 2003 to April 2004). More than four in ten (43%) either indicated that they 'did not know' (30%) or refused to respond (13%). However, a third (33%) of the establishments estimated their turnover or financial budget to be less than £250,000. Almost one in ten (9%) of the establishments indicated it would be more than £1 million. There was no significant difference in turnover/financial budget by region.

A far higher proportion of all agriculture/mining/quarrying establishments had a turnover/financial budget of under £50k than other sectors (22% compared to 5% in manufacturing/construction). Sectors most likely to state £1 million plus in turnover/financial budget were manufacturing/construction and also the utilities sector.

As expected, there was a correlation between turnover/financial budget and number of employees.

Table 11: Turnover/financial budget for April 2003 to April 2004 by region, sector and size

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Up to £50K	9	11	9	9	8	22	5	12	10	9	9	11	3	1
Over £50K up to £100K	9	10	9	9	11	17	11	10	8	11	9	12	2	1
Over £100K up to £250K	15	13	15	14	18	16	15	10	13	15	16	16	13	3

Table 11: Turnover/financial budget for April 2003 to April 2004 by region, sector and size (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Over £250K up to £1 million	16	13	18	17	14	8	19	17	15	17	14	14	27	13
Over £1 million up to £5 million	7	7	5	8	6	3	16	10	6	6	3	4	12	24
Over £5 million up to £10 million	1	1	1	1	*	1	2	1	1	*	*	–	1	7
Over £10 million up to £20 million	1	*	*	1	*	–	2	1	*	*	*	*	*	4
Over £20 million	*	*	–	*	1	–	1	1	*	*	1	*	–	4
Don't know	30	33	30	30	27	23	23	27	32	23	39	30	32	32
Refused	13	12	14	11	15	10	6	12	15	18	9	13	11	12



More positively, four in ten (41%) establishments indicated that within the last year their turnover/financial budget at the location had increased. A further three in ten (31%) indicated that it remained at roughly the same level. However, for just over one in ten (11%) it had decreased. It is worth noting that those in financial/business services and public administration were significantly less likely than other sectors to have reported a decrease in their turnover/financial budget.

The wholesale/retail/hotels/restaurants sector establishments with 25 plus employees and also establishments in the finance/business services sector were the most likely to have experienced growth in turnover/financial budget. Table 13 shows the percentage in each sector expressing some degree of growth in the last year.

Table 12: Change in turnover/financial budget at establishment between April 2004 and April 2005, by region, sector and size

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Increased	41	43	37	40	45	25	45	39	36	52	41	40	44	46
Decreased	11	8	12	12	10	16	11	16	14	6	8	11	9	9
Roughly at same level	31	29	40	29	31	50	32	32	33	27	28	32	28	30
Too early to tell	6	6	2	7	7	3	7	4	8	4	4	7	3	2
Don't know	11	14	10	12	7	7	5	10	10	11	19	10	16	13

Note: Single response question.

Table 13: Growth in turnover/budget in last year by size and sector

Size by sector	Base: Unweighted/ Weighted	% stating growth in turnover/ financial budget in last year	
	Number	%	
Wholesale/retail/hotels/restaurants (25 plus employees)	(108/40)	56	
Manufacturing/construction (10-24 employees)	(116/45)	53	
Financial/business services (2-9 employees)	(162/322)	52	
Financial/business services (10 plus employees)	(189/64)	48	Above Average
Manufacturing/construction (25 plus employees)	(128/46)	48	
Wholesale/retail/hotels/restaurants (10-24 employees)	(142/114)	46	
Manufacturing/construction (2-9 employees)	(149/222)	43	
Utility (10 plus employees)	(103/24)	43	
Public administration (2-9 employees)	(168/295)	42	
Overall	(2,059/2,059)	41	
Agriculture/mining/quarrying (5 plus employees)	(33/11)	39	
Public administration (10-24 employees)	(136/122)	39	
Public administration (25 plus employees)	(115/64)	39	Below Average
Utility (2-9 employees)	(150/62)	38	
Wholesale/retail/hotels/restaurants (2-9 employees)	(196/576)	32	
Agriculture/mining/quarrying (2-4 employees)	(163/53)	23	



Table 14: Estimated percentage growth of turnover/financial budget, by sector

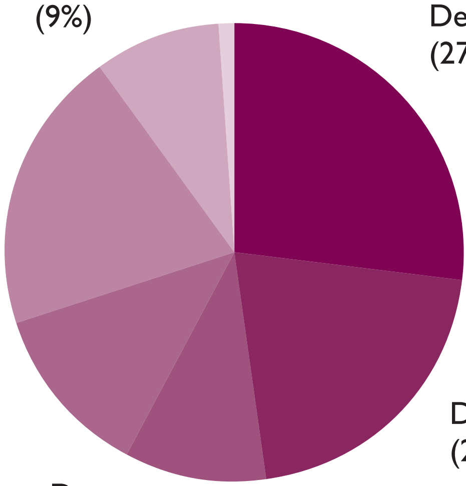
		Sector					
Base: All respondents	Total	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration
Unweighted	875	**48	191	102	187	177	170
Weighted	849	16	141	34	261	199	197
	%	%	%	%	%	%	%
1-5%	30	29	23	21	27	20	49
6-10%	24	36	25	27	28	28	13
11-15%	10	10	6	9	13	15	2
16-20%	7	4	12	11	5	12	2
Over 20%	17	6	25	17	14	17	15
Don't know	12	16	9	13	10	7	19
Refused	1	–	–	1	2	1	*

Note: Single response question. ** denotes small base (unweighted base less than 100).
* denotes less than 0.5 but greater than zero.– denotes zero.

Establishments that reported an increase in their turnover/financial budget compared to the previous year were asked to estimate the percentage growth. Three in ten (30%) estimated the growth to be between 1 and 5%; nearly a quarter (24%) between 6 and 10%; with a similar proportion either between 11% and 20% (17%) or over 20% (17%). Public administration organisations were significantly more likely to report a lower increase (1 to 5%) than any other sector.

Establishments that had estimated a decrease in their turnover or financial budget were also asked to estimate the percentage decrease they would expect. Over a quarter (27%) estimated a decrease of between 1% and 5%, with just over two in ten (21%) a 6 to 10% decrease. A similar proportion thought their turnover/financial budget would reduce by between 11 and 20% (22%) and over 20% (20%).

Chart 5: Estimated percentage decrease of turnover/financial budget



Base: All estimating a turnover/financial budget decrease compared to the previous year (unweighted 212, weighted 222).
Single response question.

2.7 Growing establishments: growth in number of employees

For nearly two thirds (64%) of establishments the number of employees at the location has remained roughly at the same level year on year. Whilst for nearly a quarter (24%) there has been an increase in employees, for one in ten (10%) there has been a decrease. In terms of industry sector, agriculture/mining/quarrying were least likely to report growth in terms of employees, and it is worth noting that establishments in public administration were significantly more likely than establishments in other sectors to report an increase in staff.

Larger establishments were more likely to report growth in headcount. Clearly there would have been an overlap between size and sector; public sector establishments were more likely to be larger establishments (with 25 plus employees) and therefore more likely to have experienced an increase in headcount. However, other public administration establishments with up to 24 employees were also above average in terms of growth.



Table 15: If the number of employees at this location increased, decreased or stayed roughly at the same level compared to the previous year

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Increased	24	28	21	22	25	7	29	26	15	26	36	21	31	36
Decreased	10	7	7	13	10	8	12	16	9	9	10	10	10	13
Roughly at same level	64	63	71	63	63	84	58	56	74	63	52	67	58	50
Don't know	2	1	1	2	2	1	1	1	2	2	2	2	1	1

Note: Single response question.

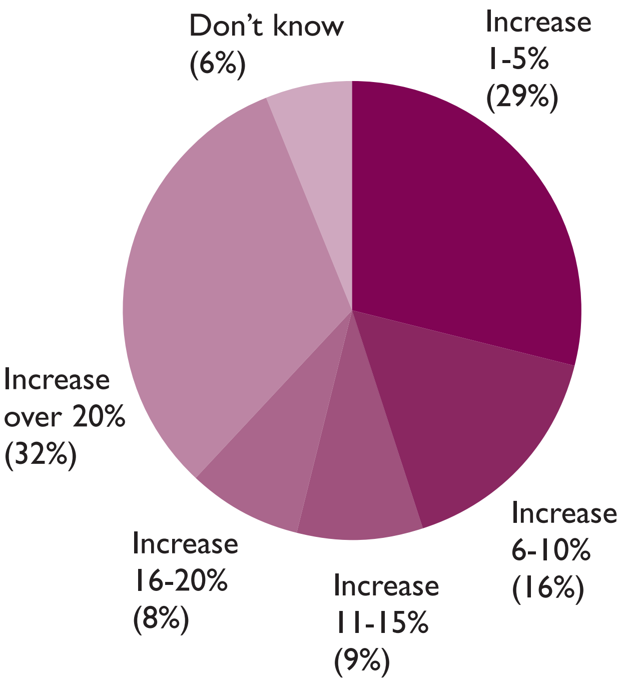
All manufacturing establishments were above average in terms of the proportion saying that they had grown in the last year (the 10-24 size band most significantly so). It is interesting to note that, of the 2-9 employee sized establishments in the financial and business services sector, (52%) had grown their turnover (as shown in table 13) but only a quarter (23%) of them had grown their headcount (as table 16 indicates).

Table 16: Growth in number of employees in last year by size and sector

Size by sector	Base: Unweighted/ Weighted	% stating growth in number of employees in last year	
	Number	%	
Public administration (25 plus employees)	(115/64)	40	Above Average
Financial and business services (10 plus employees)	(189/64)	39	
Manufacturing/construction (10-24 employees)	(116/45)	37	
Public administration (2-9 employees)	(168/295)	36	
Public administration (10-24 employees)	(136/122)	36	
Manufacturing/construction (25 plus employees)	(128/46)	35	
Wholesale/retail/hotels/restaurants (25 plus employees)	(108/40)	34	
Utility (10 plus employees)	(103/24)	34	
Manufacturing/construction (2-9 employees)	(149/222)	36	
Overall	(2,059/2,059)	24	
Financial and business services (2-9 employees)	(162/322)	23	Below Average
Utility (2-9 employees)	(150/62)	23	
Agriculture/mining/quarrying (5 plus employees)	(33/11)	22	
Wholesale/retail/hotels/restaurants (10-24 employees)	(142/114)	21	
Wholesale/retail/hotels/restaurants (2-9 employees)	(196/576)	13	
Agriculture/mining/quarrying (2-4 employees)	(163/53)	4	

In terms of the percentage increase in the number of employees, nearly three in ten establishments (29%) reported a 1 to 5% increase and nearly a third (32%) reported an increase of over 20%.

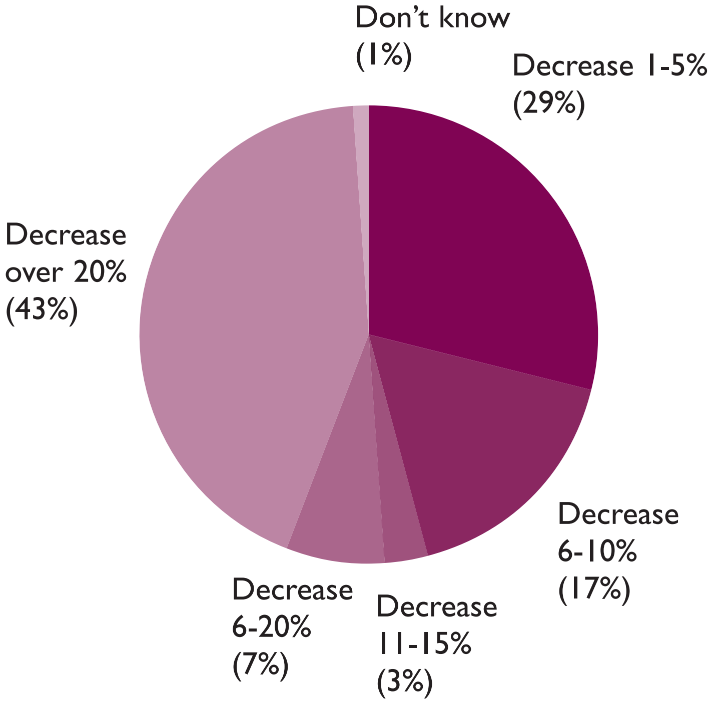
Chart 6: Estimated percentage growth in employee numbers.



Base: All whose number of employees at this location has increased (unweighted 567, weighted 503).
Single response question.

Establishments which reported a reduction in the number of employees at their location were asked to estimate what this decrease had been. Almost half (46%) indicated the reduction in staff was between 1 and 10%. Over four in ten (43%) indicated that the reduction was over 20%.

Chart 7: Estimated percentage decrease in employee numbers.



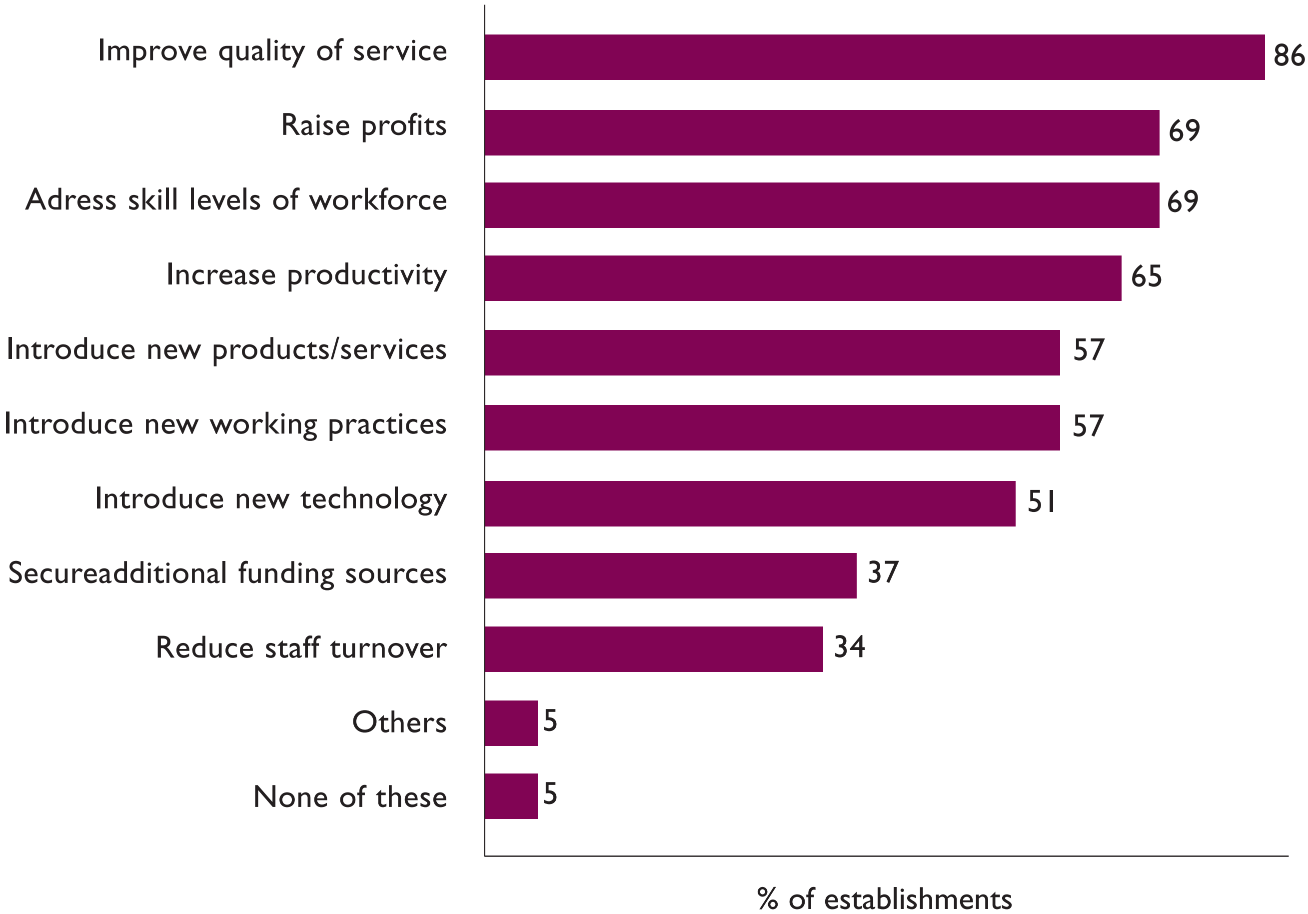
Base: All whose number of employees at this location has decreased (unweighted 222, weighted 205).
Single response question.

2.8 Objectives for the establishment over the next year

The Employer Panel Survey 2005 explored business objectives for the establishment for the next year. Almost nine in ten said that improving quality of service (including customer service) was an objective (86%), with almost seven in ten saying the same for both raising profits and addressing the skills levels of the workforce (both 69%). Just under two thirds had set the objective to increase productivity (65%); and four in seven to introduce new products/services or to introduce new working practices (both 57%). Other than to introduce new technology (51%), no other objective had been set by more than two in five establishments.

High frequencies of objective setting, for a broad range of objectives, indicated that a high level of activity was planned for the next 12 months.

Chart 8: Objectives that have been set for establishments



Base: All respondents (unweighted 2059, weighted 2059). Multiple response question.
Overall responses of 5% plus shown. Don't know response excluded.

The most consistent difference between sub groups was that establishments with over 25 employees were more likely to have set most of the objectives (see table 17). The difference was particularly pronounced in the case of reducing staff turnover (60%) and introducing new working practices (74%).

Another pattern was that those not providing any training were less likely to have set themselves most of the aforementioned objectives. However, those providing both on and off-the-job training were more likely to have set the following objectives than those providing just one type of training or neither type:

- address skill levels of the workforce
- introduce new working practices
- introduce new technology
- reduce staff turnover

Public administration establishments were less likely to have set the objective of increasing productivity (42% versus 65% overall), and were more likely to have set the objective of introducing new working practices (69% versus 57% overall) or securing additional funding sources (54% versus 37% overall). Those in wholesale/retail/hotels/restaurants were more likely to have set the objective of introducing new products or services (75% versus 57% overall).

Subsidiary offices of multi-site establishments were more likely to have set the objective to introduce new products and services (64%) or new working practices (66%) and, together with the head office of multi-site establishments, to reduce staff turnover (42%).

Establishments which had been operating for less than 10 years (76%), and private sector organisations (78%), were particularly likely to wish to raise profits.

Table 17: Business objectives at site by size and training provided

		Size of establishment (number of employees)			Training provided			
Base: All respondents	Total	2-9	10-24	25 plus	On-the-job	Off-the-job	Both	Neither
Unweighted	2,059	1,005	583	471	420	232	1,020	381
Weighted	2,059	1,535	342	182	486	238	893	436
	%	%	%	%	%	%	%	%
Improve quality of service	86	84	91	94	87	83	91	77
Raise profits	69	71	62	69	72	62	67	74
Address skills levels of workforce	69	65	80	83	67	66	80	50
Increase productivity	65	64	66	73	69	65	66	58
Introduce new products/services	57	56	56	61	64	44	57	56
Introduce new working practices	57	52	69	74	51	52	71	36
Introduce new technology	51	49	55	62	46	50	60	40
Secure additional funding sources	37	35	43	50	27	42	46	30
Reduce staff turnover	34	29	43	60	32	32	42	22
Others	5	5	7	9	4	7	7	3
Don't know	1	1	1	2	2	1	*	1
No answer	*	*	1	*	–	–	*	1
None of these	5	6	2	1	4	6	3	9

Note: Multiple response question. * denotes less than 0.5 but greater than zero. – denotes zero.



2.7 Summary

Nearly three quarters (74%) of the establishments in the panel were small, with between 2 and 9 employees. Over a half of the individuals interviewed were either the owner (38%) or the Managing Director/ Chief Executive (14%).

Just under two thirds (65%) of the establishments were single site establishments and the majority (77%) were private sector establishments. Almost two thirds (64%) of private sector establishments were Welsh owned. Nearly all (91%) were UK owned.

All private sector establishments were asked about the activities undertaken at the site. The majority (78%) produced goods and/or provided services for consumers, with a smaller number indicating they produced goods and/or services for other companies (42%). A substantial amount of establishments said that they were administrative only (13%) or served other parts of a wider organisation in other ways (12%).

In terms of the average percentage breakdown of where their business comes from, regardless of whether they produced goods and/or services for customers or companies – or indeed both – the largest proportion of respondents' business came from within a 25 mile radius of them. Having said this, establishments which provide goods or services to other companies were less dependent on a local (25 mile radius) customer base (43% compared to 81% of those who produce goods and/or services to consumers only).

Many establishments in the panel were growing year on year (either in terms of turnover or number of employees). Just over four in ten (41%) establishments had witnessed some increase in turnover/financial budget in the last year. For over half (54%) this had been in the order of a 1-10% increase.

Almost a quarter (24%) said that the number of employees at the site had increased year on year. Of these, three in ten (29%) said that headcount had increased by 1-5% and one in six (16%) said it had increased by 6-10%.

Although the proportion of public administration establishments which were growing in terms of financial budget was not particularly high, the proportion of establishments that were growing in terms of the number of employees was relatively high. It is also interesting to note that in the private sector, a relatively higher proportion of the finance/business sector and also the wholesale/ retail/hotels/restaurants with 10 employees plus said that they were increasing turnover. Some of these sub groups, however, did not have a correspondingly higher than average growth in terms of their number of employees.

Establishments were generally ambitious for their future and had a multitude of objectives to meet in the next year. Respondents were asked what objectives had been set for their establishment. Overall, the majority of establishments (86%) had set an objective to improve the quality of the service. However, other objectives that had been set by two thirds of establishments included: raising profits (69%); addressing the skill levels of the workforce (69%); and increasing productivity (65%).

3.0 TRAINING ACTIVITY UNDERTAKEN

3.1 Introduction

This section explores the current training activity in establishments. The issues covered in the survey included:

- On-the-job training provided in the last year
- Off-the-job training provided in the last year
- Types of training planned in next year
- Difficulties experienced in finding an appropriate training provider and the results of those difficulties
- Percentage of turnover spent on training in the last year (on or off-the-job)
- Changes in investment in training over the past 3 years
- Influence of decision making about training

The establishments were asked whether they had provided any of the types of training listed below, either on or off-the-job.

- Management skills
- Communication skills
- Other technical/practical skills
- Team working skills
- General IT users' skills
- Customer handling skills
- Problem solving skills
- Using numbers
- IT professional skills
- Literacy skills

3.2 On-the-job training provided in the last year

This section of the questionnaire explored the proportion of establishments that had provided any on-the-job training in the last year (i.e. training which took place at the employee's work place). Two thirds of the establishments answered that they had (67%), though there were significant variations by sub group, as follows:

- On-the-job training was provided by a significantly high proportion of establishments in North Wales (74%)
- By sector, incidence of on-the-job training was highest in public administration (79%) and lowest in agriculture/mining/quarrying (23%)
- Provision was significantly lower in establishments with up to 24 employees compared to those with 25 plus employees (60% of establishments with 2-9 employees and 86% of those with 10-24 employees, compared with 91% of those with 25 plus)
- Provision was lowest in single site operations (60% compared to 82% in subsidiary offices of multi-site establishments)

In terms of the types of on-the-job training that had been provided, the most common category was 'other technical/practical skills' related to the job (70%). The other technical/practical skills code encompassed any training that enhanced the technical abilities or practical skills of the employee, but which were not covered by the generic skills listed in Chart 9 and were not IT related. Three in five had provided training on customer handling skills (60%) or team working skills (59%); and just over half had provided general IT users' skills (54%), communication skills (53%) or problem solving skills (51%). Other types of training mentioned with any frequency were management skills (41%), using numbers (37%), IT professional skills (26%) and literacy skills (22%), with no other answer mentioned by more than one in eight.

Table 18: On-the-job training in the last year by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	67	74	64	65	64	23	60	59	65	70	79	60	86	91
No	33	25	36	35	36	77	38	41	35	30	21	40	14	8

Note: Single response question. 'Don't know' not shown.

Table 19: On-the-job training in the last year by type and nature of establishment

		Type of establishment			Nature of establishment		
Base: All respondents	Total	Private	Public	Other	Single site	Head office of multi-site establishment	Multiple site (not head office of multi-site establishment)
Unweighted	2,059	1,582	346	119	1,205	244	606
Weighted	2,059	1,589	304	153	1,338	173	546
	%	%	%	%	%	%	%
Yes	67	64	79	74	60	73	82
No	33	36	19	26	40	27	17

Note: Single response question. 'Don't know' not shown.

For all types of on-the-job training (except using numbers, first aid and hygiene/food hygiene) the clearest difference between sub-groups was by size of establishment. Table 20, shows that provision was highest amongst establishments with 25 plus employees. This was also true within most sectors, though not generally for utilities and financial/ business services. In terms of sector:

A variety of training had been provided by a higher proportion of establishments in wholesale/retail/hotels/restaurants than in any other sector:

- communication skills (64%)
- customer handling skills (83%)
- team working skills (68%)
- problem solving skills (59%)
- using numbers (49%)

Respondents in finance/business services were significantly more likely than other sectors to mention:

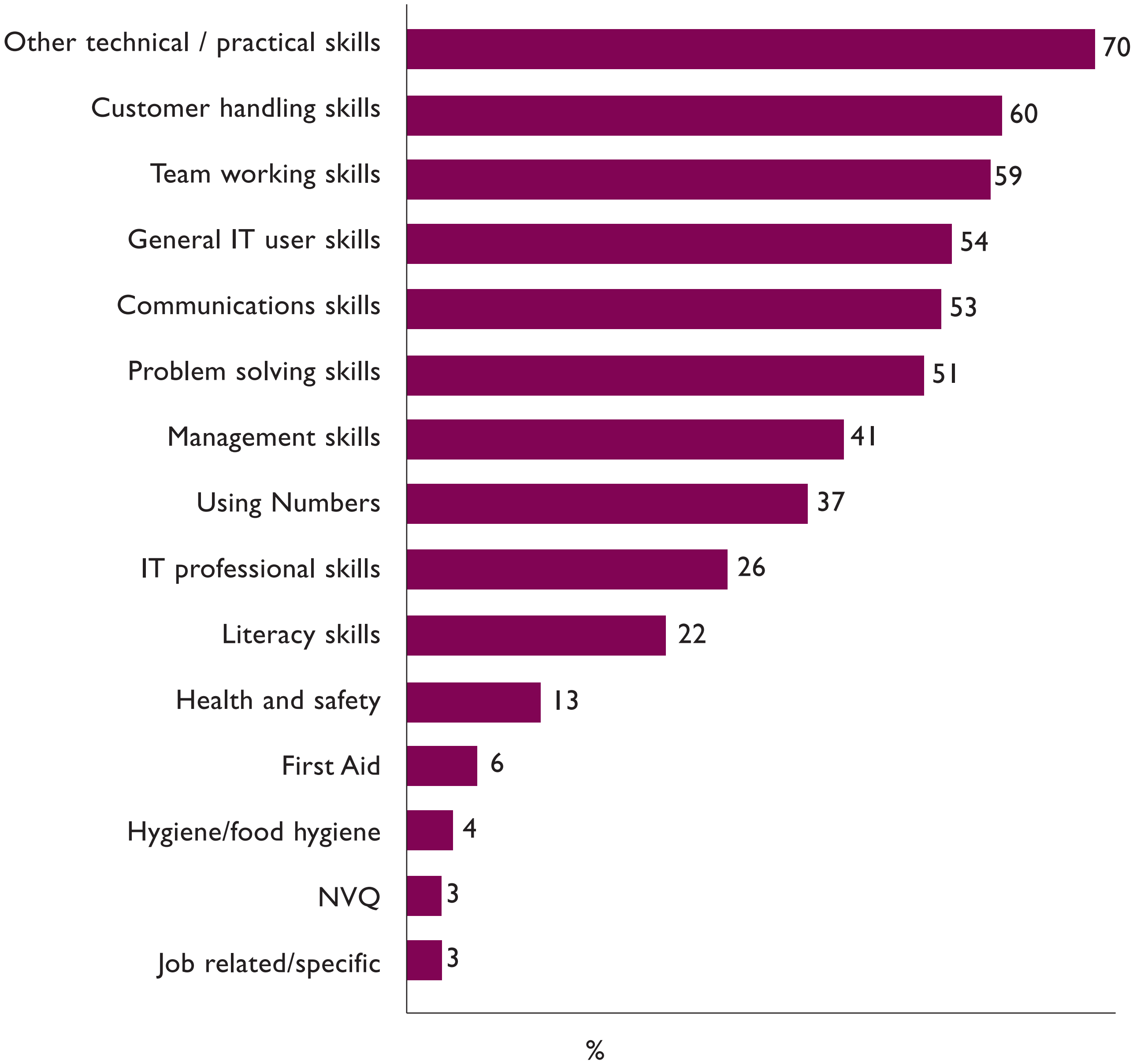
- general IT users' skills (77%)
- IT professional skills (45%)

Those in public administration were significantly more likely to mention:

- management skills (53%)
- literacy skills (31%)
- first aid (15%)



Chart 9: Types of on-the-job training provided in the last year



Base: All respondents providing on-the-job training (unweighted 1,440, weighted 1,380).
Multiple response question. Responses of 3% plus shown. 'Don't know' and 'Other' responses not shown.

Table 20: Types of on-the-job training provided by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1,440	368	170	545	288	**45	281	158	343	264	349	526	486	428
Weighted	1,380	349	187	516	280	14	188	51	477	269	380	921	293	165
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Other technical/ practical skills	70	67	72	70	70	76	88	69	68	75	58	67	69	85
Customer handling skills	60	59	67	59	54	41	45	65	83	51	44	59	59	62
Team working skills	59	60	61	59	52	46	53	59	68	44	60	54	65	71
General IT users' skills	54	58	51	49	57	47	47	53	40	77	58	50	56	70
Communicat-ion skills	53	55	54	54	47	36	35	54	64	44	56	51	55	63
Problem solving skills	51	50	48	53	48	38	43	47	59	46	49	49	50	60
Management skills	41	43	42	41	36	43	33	37	40	32	53	32	52	68
Using numbers	37	39	43	38	33	22	34	32	49	36	27	39	34	37



Table 20: Types of on-the-job training provided by region, sector and size of establishment (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1,440	368	170	545	288	**45	281	158	343	264	349	526	486	428
Weighted	1,380	349	187	516	280	14	188	51	477	269	380	921	293	165
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
IT professional skills	26	24	31	23	31	20	25	16	14	45	30	25	24	35
Literacy skills	22	27	21	20	21	13	15	17	24	12	31	19	27	28
Health and safety	13	17	6	15	8	13	16	10	12	7	16	10	15	22
First Aid	6	8	3	5	5	7	3	5	2	2	15	5	8	8

Note: Multiple response question. Overall responses of 6% plus shown on the chart. 'Don't know' and 'Other' responses not shown. ** denotes small base (unweighted base less than 100).

Table 21: Types of on-the-job training provided by type and nature of establishment

		Type of establishment			Nature of establishment		
Base: All respondents	Total	Private	Public	Other	Single site	Head office of multi-site establishment	Multiple site (not head office of multi-site establishment)
Unweighted	2,059	1,582	346	119	1,205	244	606
Weighted	2,059	1,589	304	153	1,338	173	546
	%	%	%	%	%	%	%
Other technical/practical skills	70	74	61	52	71	66	69
Customer handling skills	60	62	53	49	53	57	72
Team working skills	59	56	67	62	52	58	71
General IT users' skills	54	49	69	59	49	60	60
Communication skills	53	51	60	59	50	53	60
Problem solving skills	51	50	52	51	47	48	58
Management skills	41	36	59	48	32	40	56
Using numbers	37	38	39	30	37	36	39
IT professional skills	26	23	38	24	25	34	25
Literacy skills	22	19	38	12	23	24	19
Health and safety	13	12	14	17	11	19	15
First Aid	6	5	9	11	5	8	7

Note: Multiple response question. Overall responses of 6% plus shown on the chart.
'Don't know' and 'Other' responses not shown. ** denotes small base (unweighted base less than 100).

Subsidiary offices of multi-site establishments were more likely to have provided many types of training too, especially communication skills (60%), customer handling skills (72%) and management skills (56%).

The questionnaire then sought to explore the types of on-the-job training by various occupations within each establishment. Due to restrictions on questionnaire length the programme set up for the interview combined all categories of occupation at each site and then randomly selected two occupations for the respondent to comment on. The interviewer then asked the respondent to consider these, and also what specific types of on-the-job training were offered to each one.

The results of these questions are contained in sections 3.2.1 – 3.2.7, which follow:

3.2.1 On-the-job training provided for managers and senior managers in the last 12 months

This section explores types of on-the-job training provided for managers and senior managers. Approximately a third of respondents in establishments that provided some on-the-job training and had said that managers or senior managers existed on site, had provided them with the following: team working skills (36%), customer handling skills (34%), general IT users' skills (33%), problem solving skills (33%), communication skills (31%), other technical/practical skills (31%) and management skills (30%).

Three in ten (30%) said that they had not provided any on-the-job training to managers and senior managers in the last year. Types of establishments most likely to have not provided training to this occupational group were:

- those in North Wales (22% said they had provided no training at all compared to 39% in South West Wales)
- public administration (15% said that they had provided no training at all to this occupational group)
- larger establishments (20% of establishments with 25 plus employees said that they had provided no training at all in the last year compared to 32% of those with 2-9 employees)

Looking at sub-groups, the same sorts of patterns were evident as for the provision of training for staff overall. The majority of types of training were more likely to have been provided in the establishments with 25 plus employees (of those that had provided training, they provided a vast variety) and by subsidiary offices of multi-site establishments. Comparing sectors, the majority of types of training were most likely to be mentioned by respondents in finance/business or public administration. Many types of on-the-job training were also mentioned more often by respondents based in North Wales.

Table 22: Types of on-the-job training provided for managers and senior managers in the last year by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	889	223	106	332	192	**35	152	115	230	164	193	390	288	211
Weighted	934	233	128	346	200	11	110	38	361	191	222	672	181	81
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Team working skills	36	46	39	34	25	17	21	43	40	29	43	32	43	51
Customer handling skills	34	39	42	31	26	17	18	37	45	31	27	33	38	37
Problem solving skills	33	36	31	33	28	16	17	34	37	30	37	31	36	43
General IT users' skills	33	40	25	31	31	28	27	28	26	51	32	31	34	42
Other technical/ practical skills	31	35	28	32	27	24	24	34	32	44	23	29	36	42
Communicat-ion skills	31	37	29	29	26	20	15	33	33	26	38	28	34	43
Management skills	30	36	28	28	27	19	17	33	28	24	46	24	42	56
Using numbers	24	28	30	23	15	17	17	18	31	20	19	24	24	22



Table 22: Types of on-the-job training provided for managers and senior managers in the last year by region, sector and size of establishment (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	889	223	106	332	192	**35	152	115	230	164	193	390	288	211
Weighted	934	233	128	346	200	11	110	38	361	191	222	672	181	81
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
IT professional skills	15	17	14	14	17	8	12	8	10	26	18	16	13	18
Literacy skills	14	14	15	14	13	5	11	12	16	6	20	13	17	17
Other	25	33	16	27	21	25	18	19	20	23	41	22	34	33
No on-the-job training for this occupation in last year	30	22	35	28	39	34	46	33	36	25	15	32	24	20
Don't know	1	*	–	2	–	–	1	2	1	1	2	1	1	2

Note: Multiple response question. ** denotes small base (unweighted base less than 100).
* denotes less than 0.5 but greater than zero. – denotes zero.

3.2.2 On-the-job training provided for professional occupations

Of the establishments which provided some on-the-job training and who had also said that professional occupations existed on site, almost half had provided on-the-job training in general IT users' skills (47%) or other technical/ practical skills (46%); and two in five had provided team working skills (40%). Around a third had provided training for professionals in problem solving skills (35%), communication skills (32%) and customer handling skills (31%); followed by IT professional skills (28%) and management skills (25%).

The base sizes (i.e. the number interviewed) were too small for many differences between sub-groups to be statistically significant, but the usual patterns by size band and nature of establishment were still evident.

Just over one in ten establishments (12%) with professional occupations on site, and that also provided on-the-job training, said that they had not provided any on-the-job training to this specific group in the last year.

3.2.3 On-the-job training provided for associate professional occupations in the last 12 months

Associate professional occupations include occupations such as laboratory technicians, IT user support technician, nurses, physiotherapists, housing and welfare officers, police officers (sergeant and below), fitness instructors, air traffic controllers, legal associate professionals, etc. Employees in this group are characterised as having qualifications in order to do their job.

Over half of the establishments which had both provided training and employed associate professionals on site, had also provided on-the-job training in other technical/practical skills (52%), and close to half provided general IT users' skills (47%). Two in five had provided training on communication skills or team working skills (both 39%) and almost as many provided customer handling skills (36%) and problem solving skills (34%). Most other types of training were provided by about a quarter of establishments.

Just over one in ten (15%) who provided on-the-job training and who had associate professionals on site said that they had not provided any on-the-job training to this particular group within the last year. The sample sizes were too small for any meaningful sub-group analysis.

3.2.4 On-the-job training provided for administrative/secretarial staff in the last 12 months

Of the establishments that provided some on-the-job training and who had said that administrative/secretarial posts existed on site, 52% of the sample said they provided them with general IT users' skills training. Around a third had provided training in other technical/practical skills or customer handling skills (both 36%), team working skills (35%), communication skills (34%) or problem solving skills (31%).

Establishments with 25 plus employees were more likely to provide most types of training for administrative/secretarial staff, especially general IT users' skills, other technical/practical skills, communication skills, team working skills and management skills. Those in subsidiary offices of multi-site establishments were more likely to provide training in general IT users' skills, customer handling skills, team working skills and problem solving skills.

Almost a quarter (23%) of those providing on-the-job training and who had administrative/ secretarial staff on site, said that they had not provided any on-the-job training to this particular group during the last year.

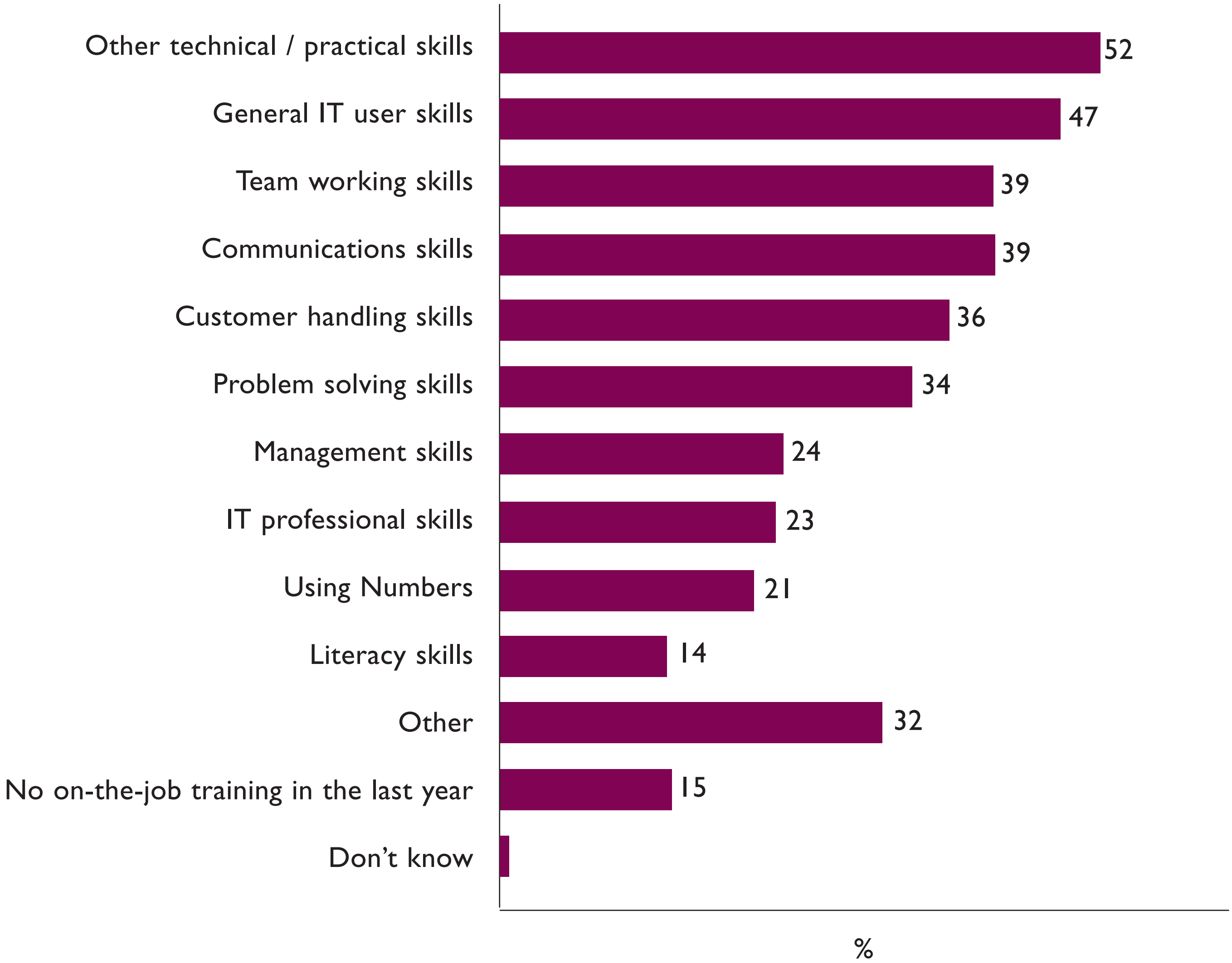


Table 23: Types of on-the-job training provided for professional occupations in the last year by size and nature of establishment

		Size of establishment (number of employees)			Nature of establishment		
Base: All respondents providing some on-the-job training who also had professional occupations on site	Total	2-9	10-24	25 plus	Single site	Head office of multi-site establishment	Multiple site (not head office of multi-site establishment)
Unweighted base	306	123	**97	**86	173	**39	**93
Weighted base	307	212	60	34	196	25	86
	%	%	%	%	%	%	%
General IT users' skills	47	39	63	68	44	49	51
Other technical/practical skills	46	44	44	60	44	43	50
Team working skills	40	34	50	57	36	31	50
Problem solving skills	35	33	36	46	28	26	53
Communication skills	32	29	35	45	28	31	41
Customer handling skills	31	31	27	34	25	24	45
IT professional skills	28	24	37	42	26	34	31
Management skills	25	18	39	46	20	44	29
Using numbers	20	20	18	21	20	15	21
Literacy skills	18	14	26	22	20	10	13
Other	34	32	36	44	31	34	40
No on-the-job training for this occupation in last year	12	14	8	6	14	14	6
Don't know	3	3	2	4	4	4	1

Note: Multiple response question. ** denotes small base (unweighted base less than 100)

Chart 10: Types of on-the-job training provided for associate professional occupations in the last year



Base: All respondents providing some on-the-job training who also had professional/technical occupations on site (unweighted 159, weighted 148). Multiple response question.



Table 24: Types of on-the-job training provided for administrative/secretarial staff in the last year by size and nature of establishment

		Size of establishment (number of employees)			Nature of establishment		
Base: All respondents providing some on-the-job training who also had secretarial/admin occupations on site	Total	2-9	10-24	25 plus	Single site	Head office of multi-site establishment	Multiple site (not head office of multi-site establishment)
Unweighted base	469	130	169	170	226	**79	163
Weighted base	392	237	88	67	231	50	111
	%	%	%	%	%	%	%
General IT users' skills	52	50	50	64	49	52	58
Other technical/practical skills	36	35	29	48	33	41	39
Team working skills	36	36	34	39	35	24	44
Problem solving skills	35	32	36	44	31	34	43
Communication skills	34	32	34	41	34	33	33
Customer handling skills	31	31	31	34	29	25	39
IT professional skills	23	24	19	23	23	18	23
Management skills	20	24	13	17	25	19	12
Using numbers	19	16	17	31	18	19	21
Literacy skills	10	11	7	13	12	10	7
Other	24	23	19	34	21	27	28
No on-the-job training for this occupation in last year	23	24	23	18	25	27	16
Don't know	2	2	1	2	3	1	1

Note: Multiple response question. ** denotes small base (unweighted base less than 100)

3.2.5 On-the-job training provided for skilled trade occupations in the last 12 months

The training most likely to be provided for skilled trade occupations was other technical/practical skills related to the job (46%), with team working skills (36%) and problem solving skills (33%) provided by about a third. About a quarter provided customer handling skills and communication skills training (27% and 23%).

Just over a fifth (22%) who provided on-the-job training and had skilled trade occupations on site said that they had not provided any on-the-job training to this particular group in the last year.

The sample sizes were too small for any meaningful sub-group analysis.

3.2.6 On-the-job training provided for service occupations in the last 12 months (personal service and customer/sales service occupations)

Of the establishments which had provided some on-the-job training and who also had personal service occupations on site, over half had provided training in team working skills (55%), just under half in communication skills (49%) and customer handling skills (45%). Slightly less again provided problem solving skills training (43%) and other technical/practical skills (39%). Most of the other types of training were provided by about a quarter of respondents.

For sales/customer service occupations, the figures recorded were higher. Of the establishments which had provided some on-the-job training and who also had customer service occupations on site almost three quarters had provided training in customer handling skills (72%), three in six team working skills (59%), and just over half communication skills (52%). Just under half had provided training in problem solving skills training (47%), and two in five had provided other technical/practical skills (39%), general IT users' skills (39%) and using numbers (38%).

Just over one in ten (13%) who provided on-the-job training and who had either personal service or customer service/sales occupations on site, said that they had not provided any on-the-job training to these particular groups in the last year.

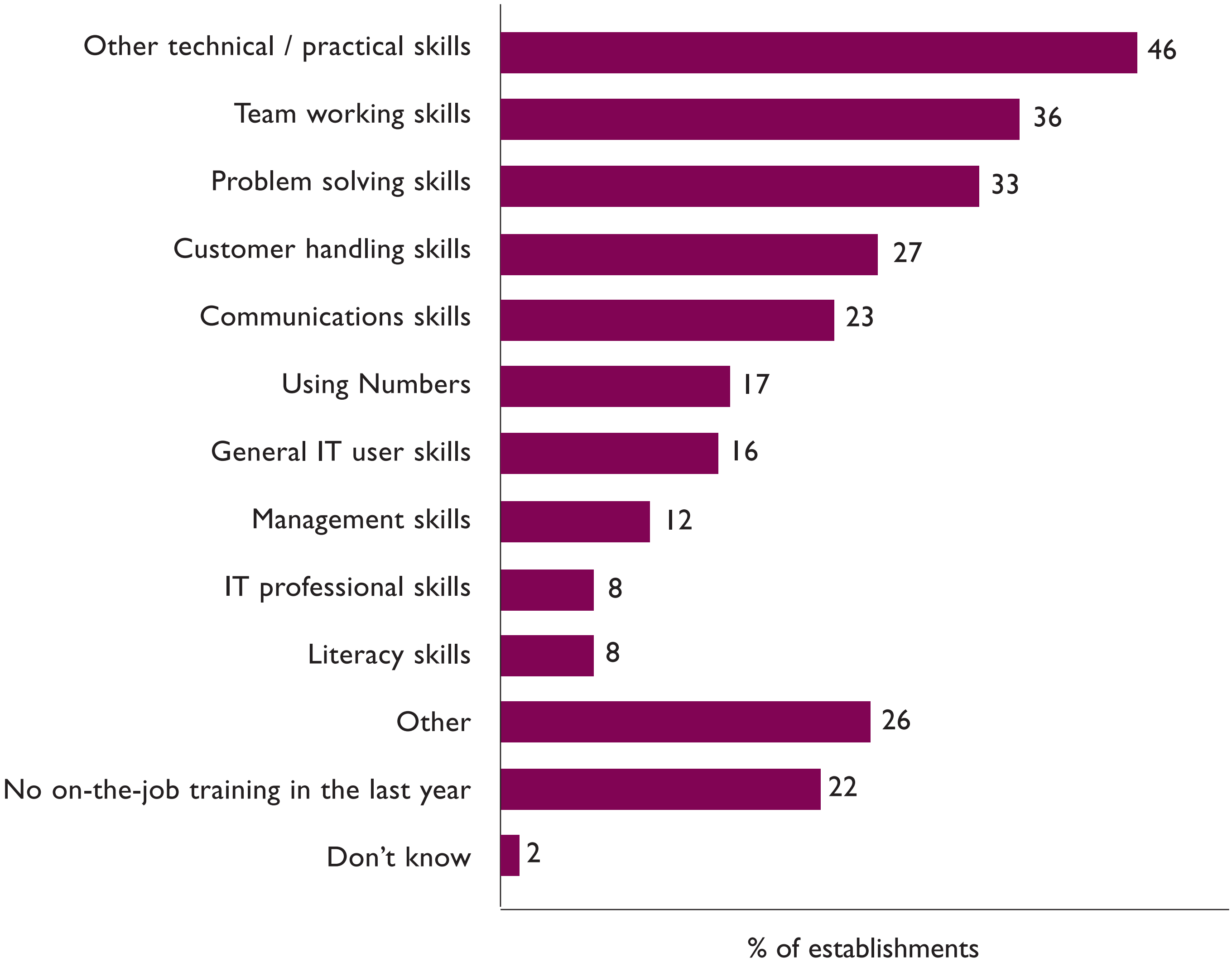
The sample sizes were too small for any meaningful sub-group analysis.

3.2.7 On-the-job training provided for process/plant/machine operatives and elementary occupations in the last 12 months

Just over half of establishments that had provided on-the-job training and who had process/plant/machine operatives on site had provided training in other technical/practical skills for process (54%). A third had provided training in team working skills (33%) and slightly less, problem solving skills (29%) and general IT users' skills (26%).

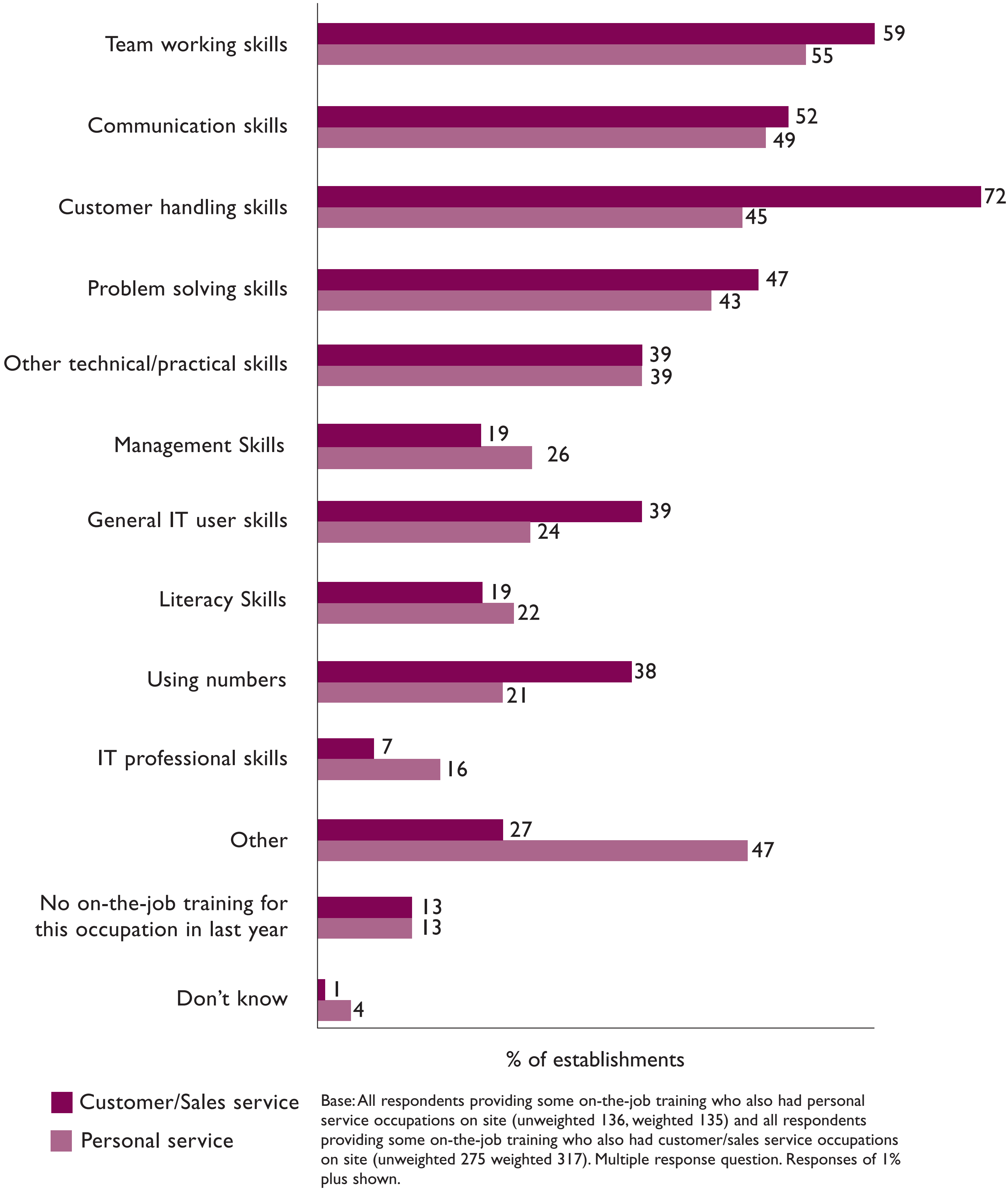
The most frequently provided training for elementary occupations was team working skills (45%), followed by customer handling skills (42%) and other technical/practical skills (38%). A third provided training in problem solving skills and communication skills (both 34%) whilst just under a quarter provided training in using numbers (23%). Almost a fifth who provided on-the-job training and who had either plant and machine operatives or elementary occupations on site said that they had not provided any on-the-job training to these particular groups in the last year (17% and 18% respectively). The base sizes were too small for any differences between sub-groups to be significant.

Chart 11: Types of on-the-job training provided for skilled trade occupations in the last year



Base: All respondents providing some on-the-job training who also had skilled trades occupations on site (unweighted 253, weighted 220). Multiple response allowed. Overall responses mentioned by 2% or more shown.

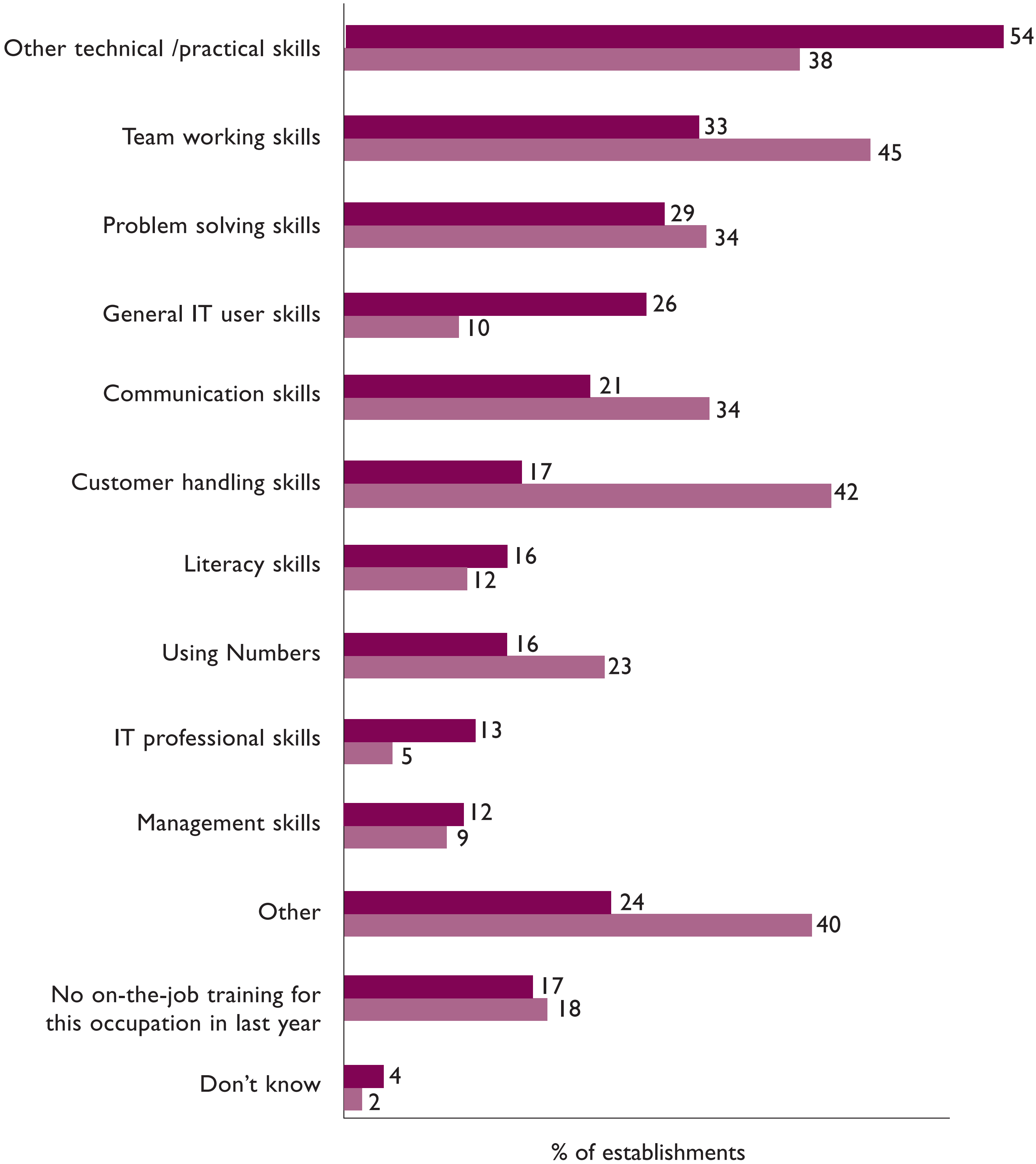
Chart 12: Types of on-the-job training provided for personal service occupations and customers/sales service occupations in the last year



Base: All respondents providing some on-the-job training who also had personal service occupations on site (unweighted 136, weighted 135) and all respondents providing some on-the-job training who also had customer/sales service occupations on site (unweighted 275 weighted 317). Multiple response question. Responses of 1% plus shown.



Chart 13: Types of on-the-job training provided for process/plant/machine operatives and elementary occupations in the last year



Plant/machine operatives

Elementary occupations

Base: All respondents providing some on-the-job training who also had plant and machine operatives on site (unweighted 113, weighted 61) and all respondents providing some on-the-job training who also had elementary occupations on site (unweighted 213, weighted 152). Multiple response question. Overall responses of 2% plus shown.

3.3 Off-the-job training provided in the last year

3.3.1 Incidence and types of training offered

As well as on-the-job training, the questionnaire also explored the provision of off-the-job training. Over half of all establishments interviewed had provided members of staff at their site with off-the-job training in the last year (55%). This was lower than the incidence recorded for on-the-job training which was two thirds (67%) of all establishments.

Provision of off-the-job training was once again far higher for establishments with 25 plus employees (84% compared to 48% of those with 2-9 employees). By sector, provision was significantly more likely to be present in the financial and business services sector and also the public administration sector (63% and 81% respectively).

It is interesting to note that whilst provision of on-the-job training was significantly higher in North Wales compared to the other regions, there was no such correlation regarding off-the-job training (55% of establishments in North Wales provided off-the-job training, in line with the national average). As for on-the-job training, incidence of off-the-job training was higher for subsidiary offices of multi-site establishments (68%).

Table 25: Whether any members of staff at the site had received any off-the-job training in the last year by region, sector and size of establishment.

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	55	55	53	53	58	34	47	41	40	63	81	48	72	84
No	44	45	46	46	41	66	52	58	59	37	18	52	27	14



The type of off-the-job training that had most frequently been provided in the last year was other technical/practical skills (51%), which was also the most common type of on-the-job training mentioned (70%). Around three in seven had provided training in management skills (44%) and around a third in communication skills (35%), team working skills (34%), general IT users' skills (33%), customer handling skills (32%) and problem solving skills (31%). Around one in five had provided training in using numbers (22%), IT professional skills (20%) or health and safety (19%).

Table 26 shows the responses for the types of off-the-job training and also compares these responses with the types of on-the-job training mentioned in section 4.2. It shows that, in the main, training was more likely to have been delivered on-the-job. The table indicates that the gap between the different types of provision was widest for team working skills, general IT user skills, customer handling skills and problem solving skills.

As was the case for on-the-job training, establishments with 25 plus employees were more likely to have provided each type of off-the-job training as, in most cases, these were subsidiary offices of multi-site establishments (see table 27). In terms of sector the results are surprisingly 'flat', the only points to mention being that:

Most types of off-the-job training were more likely to have been offered in the public administration sector than most other sectors. Public administration were also by far the most likely to provide off-the-job training in management and literacy skills (58% and 29%), and were slightly more likely to provide training in using numbers and First aid (27% and 14%).

Manufacturing was significantly more likely than most other sectors to provide health and safety training.

Wholesale/retail/hotels/restaurants were most likely to offer off-the-job hygiene/food hygiene training.

Table 26: Types of training provided in the last year

Base: All respondents providing particular type of training in last 12 months	Total all those providing off-the-job	Total all those providing on-the-job
Unweighted	1,252	1,440
Weighted	1,132	1,380
	%	%
Other technical/practical skills	51	70
Management skills	44	41
Communication skills	35	53
Team working skills	34	59
General IT user skills	33	54
Customer handling skills	32	60
Problem solving skills	31	51
Using numbers	22	37
IT professional skills	20	26
Health and safety	19	13
Literacy skills	17	22
First Aid	9	6
Hygiene/food hygiene	5	4
NVQ	3	3
Job related/specific	3	3
Childcare/protection	3	N/A

Note: Multiple response question. Overall responses of 3% plus shown. 'Don't know' and 'Other' not shown.



Table 27: Types of off-the-job training provided by region, sector and size of establishment.

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1,252	293	157	467	270	**67	234	111	236	253	351	446	410	396
Weighted	1,132	256	155	423	254	21	148	35	293	242	392	734	245	153
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Other technical/ practical skills	51	46	51	49	59	58	66	48	46	54	47	47	55	64
Management skills	44	49	37	45	40	25	36	39	37	37	58	36	55	67
Communication skills	35	33	22	41	32	16	30	40	38	27	40	30	41	47
Team working skills	34	34	24	37	35	13	33	36	38	27	38	31	39	43
General IT users' skills	33	31	31	33	36	40	35	23	23	38	38	30	35	44
Customer handling skills	32	33	23	38	26	15	25	42	44	31	26	30	33	40
Problem solving skills	31	33	22	34	30	16	29	28	34	27	33	29	32	41
Using numbers	22	24	22	22	22	14	21	15	21	20	27	21	24	24
IT professional skills	20	15	19	22	22	21	17	11	15	22	24	17	23	26

Table 27: Types of off-the-job training provided by region, sector and size of establishment (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1,252	293	157	467	270	**67	234	111	236	253	351	446	410	396
Weighted	1,132	256	155	423	254	21	148	35	293	242	392	734	245	153
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Health and safety	19	23	19	19	17	18	28	16	23	11	19	18	21	21
Literacy skills	17	21	15	16	18	7	16	11	11	7	29	14	23	21
First Aid	9	11	8	10	6	6	8	8	7	3	14	7	14	11
Hygiene/food hygiene	5	5	13	2	4	1	1	–	10	*	6	5	6	4
NVQ	3	2	3	2	4	1	3	–	1	1	5	2	2	5
Job related/ specific	3	4	1	3	2	3	8	2	*	3	4	2	3	6
Childcare/ protection	3	4	3	2	3	–	–	1	–	*	8	3	3	1
Other	11	15	10	11	9	7	9	12	7	10	17	11	12	14

Note: Multiple response question. 'Don't know' not included. ** denotes small base (unweighted base less than 100).
* denotes less than 0.5 but greater than zero. – denotes zero.

Table 28: Types of off-the-job training provided by type and nature of establishment

		Type of establishment			Nature of establishment		
Base: All respondents providing off-the-job training in the last 12 months	Total	Private	Public	Other	Single site	Head office of multi-site establishment	Multiple site (not head office of multi-site establishment)
Unweighted base	1,252	886	265	**96	622	169	458
Weighted base	1,132	785	221	124	650	107	373
	%	%	%	%	%	%	%
Other technical/practical skills	51	53	48	46	51	61	49
Management skills	44	36	64	60	33	62	57
Communication skills	35	30	46	45	26	40	47
Team working skills	34	32	41	39	26	39	47
General IT users' skills	33	28	50	36	33	40	32
Customer handling skills	32	32	33	31	23	35	47
Problem solving skills	31	29	37	35	26	31	40
Using numbers	22	19	39	18	22	20	24
IT professional skills	20	16	36	18	22	21	16
Health and safety	19	19	18	22	19	18	21
Literacy skills	17	11	42	11	18	14	17
First Aid	9	9	10	8	8	6	12
Hygiene/food hygiene	5	5	3	5	5	2	5
NVQ	3	3	3	*	2	7	3
Job related/specific	3	3	4	–	3	6	3
Childcare/protection	3	2	3	9	4	2	2
Other	11	9	16	17	10	14	13

Note: Multiple response question. Overall responses of 3% plus shown. 'Don't know' and 'Other' not shown.
** denotes small base (unweighted base less than 100).

3.3.2 Types of off-the-job training offered by occupational group

After exploring the types of on-the-job training by various occupations within each establishment, the survey went on to discuss off-the-job training. Again, due to restrictions on questionnaire length, the programme set up for the interview combined all categories of occupation at each site and then randomly selected two occupations for the respondent. The interviewer then asked the respondent to consider two occupational categories and asked what specific types of off-the-job training were offered to each one. Table 29 summarises all responses for all occupational groups. When exploring the data for each occupational group it is clear that:

For *managers and senior managers* specifically, management skills were, as we might expect, the most commonly provided type of off-the-job training (28%). Around one in five had provided training in other technical/practical skills (22%), team working skills (21%), customer handling skills (20%), problem solving skills (20%) and communication skills (19%).

For *associate professional occupations*, other technical/practical skills were the most frequently provided (35%), followed by general IT users' skills (21%) and communication skills (20%). Around one in six had provided training in team working (17%), customer handling (16%) or management skills (15%). One in eight had done so in literacy (13%), IT professional skills (13%) or problem solving (12%).

A quarter had provided off-the-job training in general IT users' skills to *administrative/secretarial staff* (24%). Less than two in ten had provided training in team working skills (16%), other technical/practical skills (15%), communication skills (15%), problem solving skills (14%), IT professional skills (13%) and customer handling skills (13%).

The most commonly provided type of off-the-job training for *skilled trades occupations* was other technical/practical skills (29%). One in six provided training in team working skills (17%) and almost as many provided communication or problem solving skills (both 15%). One in ten had provided training in general IT users' skills (11%) or customer handling skills (10%).

For *personal service occupations*, the highest proportion of respondents had provided off-the-job training in team working skills (28%). Just over a fifth had provided it in communication skills (23%), literacy skills (22%) or customer handling skills (21%). Less than two in ten had provided training in problem solving skills (18%), in other technical or practical skills (16%), and general IT user skills (14%) and using numbers skills (14%).

The type of off-the-job training that had most commonly been provided for *sales/customer service occupations* was customer handling skills (32%). Around a quarter had provided training on team working skills (26%), communication skills (24%) or problem solving skills (23%). One in five had provided training in management skills (20%) and one in seven (15%) in other technical/practical skills.

Only one type of off-the-job training had been provided with any frequency for *process/plant/machine operatives*: more than a quarter (27%) of establishments had provided training in other technical/practical skills. Less than one in ten had provided training in general IT users' skills (8%), in team working skills (7%) and in communication or management skills (6%), with no other answer mentioned by more than 5%.

The situation was similar for *elementary occupations*. One in five had provided training in other technical or practical skills (19%) with around one in ten providing team working skills (12%), communication skills (11%) and customer handling skills (10%). Problem solving skills (9%) was the only other type of training provided by more than 5%.



Comparing the data across occupational groups, it is evident that:

Process/plant/machine operatives and also elementary occupations received fewer types of off-the-job training than other occupations. Whilst the proportions in these two groups receiving no training at all was comparable with other occupations, the low frequencies across the various types of training indicated that only one or two types of training were generally on offer.

Administrative/secretarial and also skilled trade occupations were most likely to have received no off-the-job training in the last year (47% of establishments said that this was the case for both occupations).

Off-the-job management skills training was offered by a higher proportion of establishments to their managers/senior managers, associate professionals and also sales/customer service occupations than other occupational groups.

Training in other technical/practical skills related to the job were offered to professionals and associate professionals in more establishments than any other occupational group.

Table 30 displays the data from table 29 in a different way. It concentrates solely on the top five responses per occupational group. Each type of training has been labelled as high density (at least 20% of respondents mentioning it), medium density (between 10 and 20% of respondents mentioning it) or low density (under 10% of respondents mentioning it). This table allows us to concentrate on a) what are the most common forms of training per occupation and b) given that it is one of the top five, what proportion of establishments are providing it.

Table 30 shows for example that the top five types of training for managers and senior managers are; technical/practical skills; management skills; team working skills; customer handling skills and problem solving skills; and they are all identified as high density (i.e. they are all provided for managers in at least 20% of establishments). If we look at the skilled trades occupational group, however, the table displays the top five types of training mentioned, but we can see that only one (technical/practical skills) was identified as high density (provided by at least 20% of establishments).

Table 29: Types of off-the-job training provided, by occupational classification

Base: All respondents providing off-the-job training in last 12 months and having each type of occupation on site	Occupation								
	Managers/senior managers	Professional occupations	Associate professional	Administrative/ secretarial	Skilled trades	Personal service occupations	Sales/customer service occupations	Process/plant /machine operatives	Elementary occupations
Unweighted	763	291	156	427	226	128	180	**91	171
Weighted	760	277	129	346	200	132	167	59	112
	%	%	%	%	%	%	%	%	%
Other technical/practical skills	22	30	35	15	29	16	15	27	19
Management skills	28	23	15	10	6	12	20	6	3
Communication skills	19	21	20	15	15	23	24	6	11
Team working skills	21	21	17	16	17	28	26	7	12
General IT user skills	17	19	21	24	11	14	10	8	4
Customer handling skills	20	14	16	13	10	21	32	4	10
Problem solving skills	20	23	12	14	15	18	23	5	9
Using numbers	13	14	11	8	8	14	12	5	5
IT professional skills	9	16	13	13	5	11	2	3	1
Literacy skills	8	15	13	4	6	22	6	5	4
Other	34	44	35	20	30	47	27	40	29
No off-the-job training provided for this group in last year	31	18	28	47	37	29	44	38	38

Note: Multiple response question. 'Don't know' not shown. ** denotes small base (unweighted base less than 100).



Table 30: Priorities and incidence of off-the-job training per occupational classification

Occupational group	Top five types of training provided	% of establishments providing training
Managers/senior managers	Other technical/practical skills	High
	Management skills	High
	Team working skills	High
	Customer handling skills	High
	Problem solving skills	High
Professional occupations	Other technical/practical skills	High
	Communication skills	High
	Management skills	High
	Team working skills	High
	Problem solving skills	High
Associate professional	Other technical/practical skills	High
	Communication skills	High
	Team working skills	Medium
	Customer handling skills	High
	IT users' skills	High
Administrative/secretarial	Other technical/practical skills	Medium
	Communication skills	Medium
	Team working skills	Medium
	IT users' skills	High
	Problem solving skills	Medium
Skilled trades	Other technical/practical skills	High
	Communication skills	Medium
	Team working skills	Medium
	IT users' skills	Medium
	Problem solving skills	Medium
Personal service occupations	Communication skills	High
	Team working skills	High
	Customer handling skills	High
	Problem solving skills	Medium
	Literacy skills	High
Sales/customer service occupations	Communication skills	High
	Management skills	High
	Team working skills	Medium
	Customer handling skills	High
	Problem solving skills	High

Table 30: Priorities and incidence of off-the-job training per occupational classification (continued)

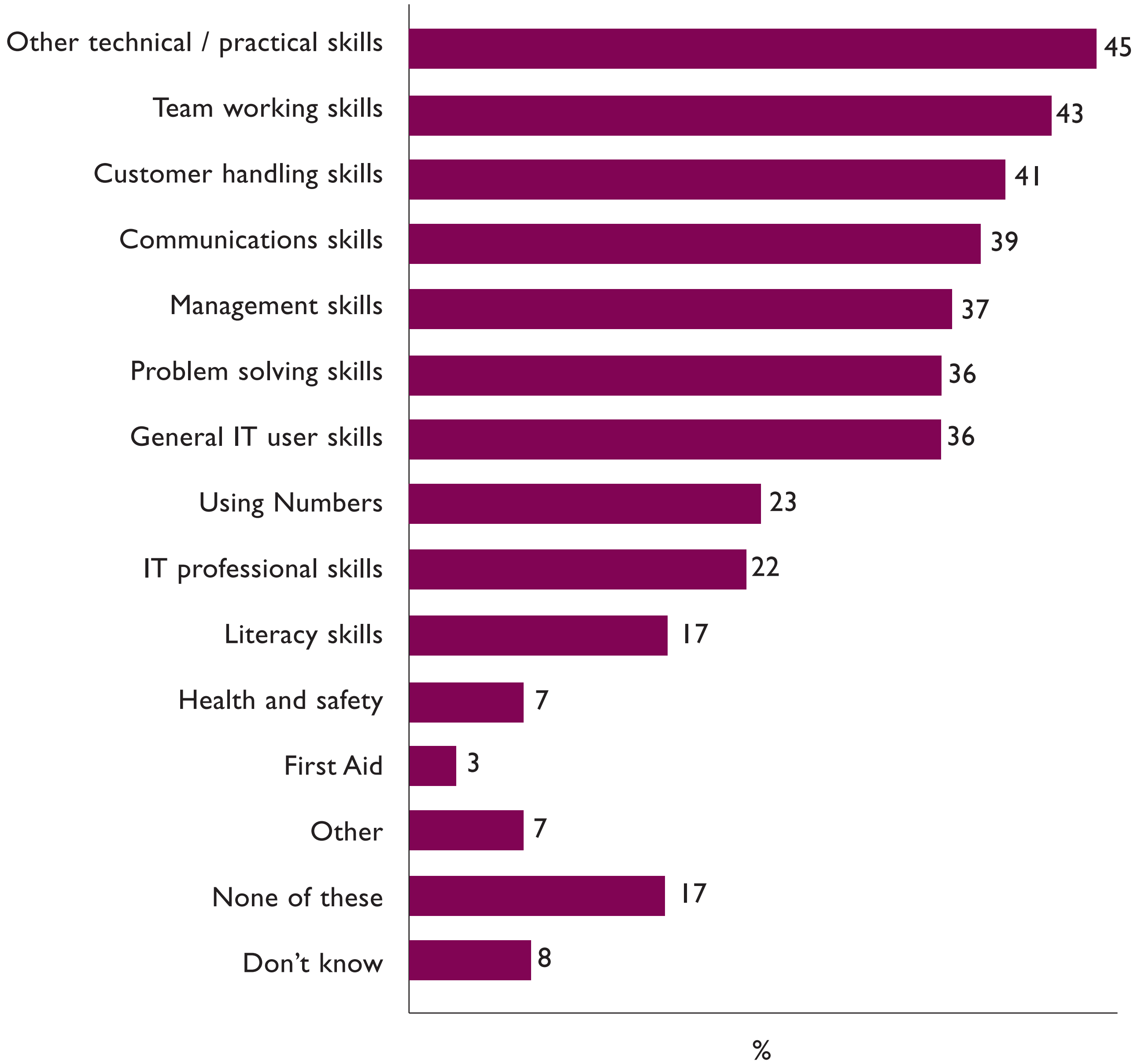
Occupational group	Top five types of training provided	% of establishments providing training
Process/plant/machine operatives	Other technical/practical skills Communication skills Management skills Team working skills IT users' skills	High Low Low Low Low
Elementary occupations	Other technical/practical skills Communication skills Team working skills Customer handling skills Problem solving skills	Medium Medium Medium Medium Low

3.4 Types of training planned for the next year

The interviews with respondents probed details about what training the establishment actually planned to provide for employees in the next year. Of the different types of training – including both on and off-the-job – the most frequently mentioned was other technical/ practical skills (45%). Slightly fewer respondents mentioned team working skills (43%), customer handling skills (41%) or communication skills (39%); with just over a third intending to provide training in management skills (37%), general IT users' skills (36%) or problem solving skills (both 36%). Just under a quarter mentioned using numbers training (23%) or IT professional skills (22%), with no other answer mentioned by more than one in five.

As for so many areas of the survey, a consistent difference in the types of training planned for the next 12 months between sub groups was shown by the number of employees within an establishment: for every type of training, establishments with 25 plus employees were more likely to plan to provide it (see table 31). Sector itself was again a distinguishing variable: those in public administration were more likely to be planning training in team working skills (61%), communication skills (52%), management skills (57%), problem solving skills (46%) and literacy skills (28%). They were also amongst the most likely to mention training in other technical/practical skills (50%), general IT users' skills (48%) and IT professional skills (34%). Establishments involved in wholesale/retail/ hotels/restaurants were more likely to be planning training in customer handling skills (48%).

Chart 14: Types of training planned for the next year



Base: All respondents (unweighted 2,059, weighted 2,059). Multiple response question.
Overall responses of 3% plus shown on the chart.

Table 31: Types of training planned for the next year by sector and size of establishment

		Sector						Size of establishment (number of employees)		
Base: All respondents	Total	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	0-24	25 plus
Unweighted	2,059	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%
Other technical/practical skills	45	34	54	37	37	52	50	40	55	72
Team working skills	43	14	37	35	41	36	61	37	58	68
Customer handling skills	41	12	32	39	48	39	42	37	50	58
Communication skills	39	13	28	31	41	33	52	34	48	64
Management skills	37	16	28	26	32	35	57	29	54	69
General IT users' skills	36	24	30	32	25	52	48	32	44	57
Problem solving skills	36	11	29	28	35	36	46	31	44	58
Using numbers	23	7	21	16	24	17	29	20	27	34
IT professional skills	22	12	18	13	11	32	34	19	24	35
Literacy skills	17	5	14	12	16	11	28	14	22	32
Health and safety	7	4	11	3	6	4	8	6	7	13
First Aid	3	1	2	2	3	1	4	3	3	3
Other	7	2	5	7	4	7	15	7	9	11
None of these	17	39	22	26	23	12	4	20	8	4
Don't know	8	8	7	9	9	6	8	9	6	5

Note: Multiple response question. Overall responses of 3% plus shown on the chart.



Multi-site establishments were more likely to mention team working skills (58%), problem solving skills (49%), customer handling (53%) or communication skills (53%), with head offices of multi-site establishments specifically more likely to plan to provide training in other technical/practical skills (61%), IT professional skills (34%) and health and safety (12%). Subsidiary offices of multi-site establishments were more likely to plan to provide training in management skills (51%).

Training provided in the last year impacts on the training planned for the next 12 months. Establishments that provided both on and off-the-job training were significantly more likely to be planning each of the different types of training. Establishments that had previously provided no on or off-the-job training were significantly less likely to be offering anything in the future: in fact four in ten (41%) of this group said that they were not planning anything for the next 12 months (compared to just 8% of establishments which provided both on and off-the-job training). Sections 4.2 and 4.3 explained the profile of the establishments least likely to be offering any training at all.

3.5 Difficulties experienced in finding appropriate training provider

The questionnaire responses relating to difficulties in providing training showed that almost one in ten (9%) of the establishments in the panel said they had experienced some difficulty over the last year in finding an appropriate training provider to meet their needs. Over two thirds said they had not experienced any difficulty (68%), whilst more than two in ten (22%) said they had not undertaken any training in the past year that needed an outside agency or provider.

Again, an obvious difference between sub-groups was by number of employees: one in eight (12%) of firms with 10 plus staff had experienced difficulties, compared to one in fourteen (7%) of establishments with up to 9 employees. The smaller establishments were most likely not to have needed training providers in the past year (27%). Establishments within public administration were most likely to have experienced difficulties (15%).

Table 32: Types of training planned in the next year by training provided in previous year

Base: All respondents	Total	On-the-job training provided in last 12 months	Off-the-job training provided in last 12 months	Both on and off-the-job training provided in last 12 months	No training provided at all in last 12 months
Unweighted	2,059	420	232	1,020	381
Weighted	2,059	486	238	893	436
	%	%	%	%	%
Other technical/practical skills	45	40	41	60	24
Team working skills	43	46	38	56	16
Customer handling skills	41	48	29	50	23
Communication skills	39	41	33	50	16
Management skills	37	33	30	52	14
General IT users' skills	36	33	37	47	18
Problem solving skills	36	36	30	47	15
Using numbers	23	26	24	26	12
IT professional skills	22	18	22	28	12
Literacy skills	17	20	16	20	8
Health and safety	7	7	9	7	5
First Aid	3	1	4	3	2
Other	7	7	5	11	2
None of these	17	15	14	8	41
Don't know	8	10	8	5	12

Note: Multiple response question.

Table 33: Difficulty finding an appropriate training provider in past year, by size and nature of establishment

		Size of establishments (number of employees)			Nature of establishment		
Base: All respondents	Total	2-9	10-24	25 Plus	Single site	Head office of multi-site establishment	Multiple site (not head office of multi-site establishment)
Unweighted base	2,059	1,005	583	471	1,205	244	606
Weighted base	2,059	1,535	342	182	1,338	173	546
	%	%	%	%	%	%	%
Yes, experienced difficulty	9	7	12	12	8	17	8
No, haven't experienced any difficulty	68	64	78	82	63	69	79
No, haven't planned any training in past year	22	27	9	5	29	13	10
Don't know	1	2	1	1	1	2	3

Note: Single response question

Table 34: Difficulty finding an appropriate training provider in past year, by sector

Base: All respondents	Total	Sector: Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration
Unweighted	2,059	196	393	253	446	352	419
Weighted	2,059	63	312	86	729	386	482
	%	%	%	%	%	%	%
Yes, experienced difficulty	9	5	10	6	4	9	15
No, haven't experienced any difficulty	68	47	59	64	65	73	76
No, haven't planned any training in past year	22	48	29	30	29	17	7
Don't know	1	–	2	1	1	1	2

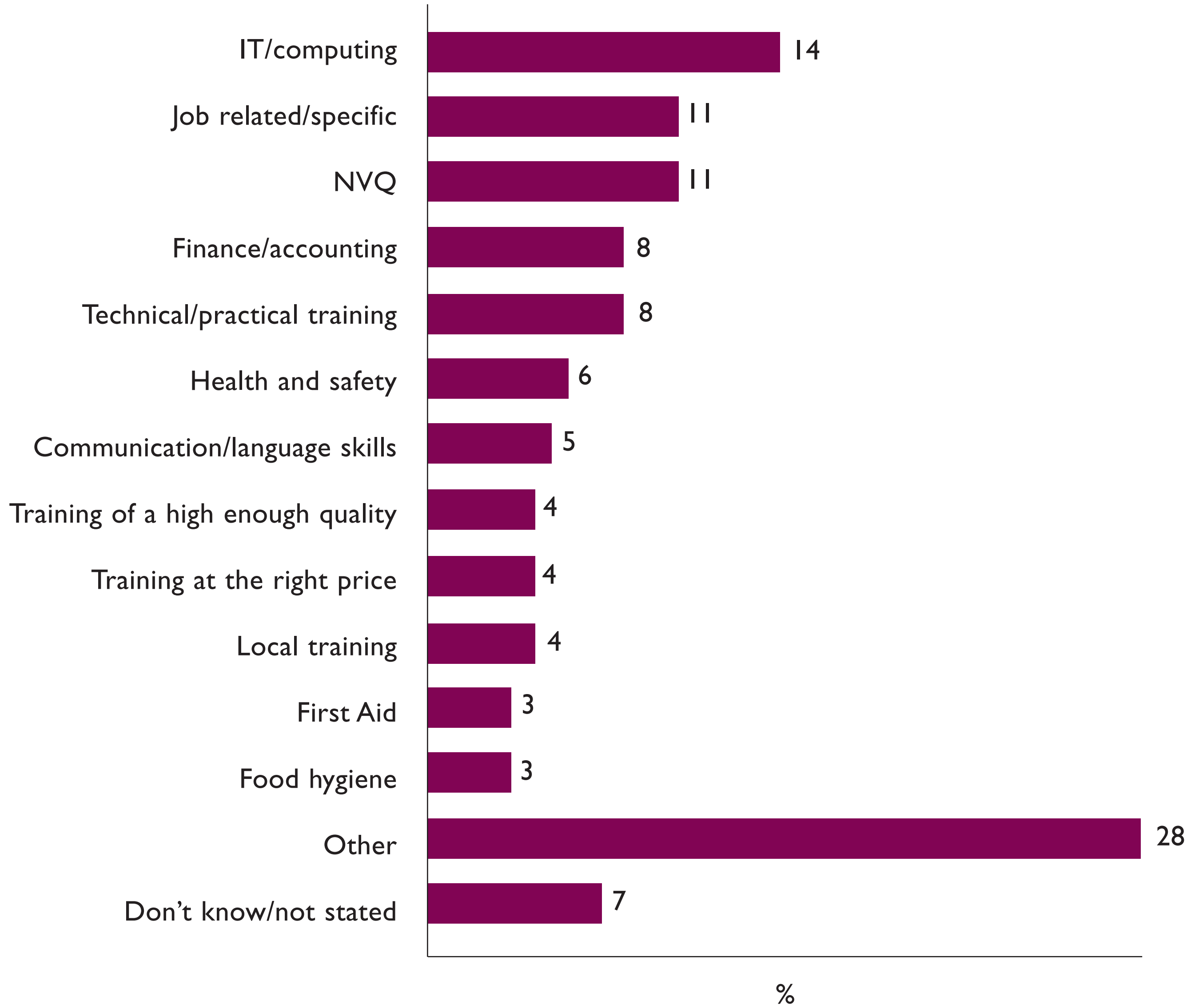
Note: Single response question. – denotes zero.



The small number of establishments which had experienced some difficulty over the last year in finding an appropriate training provider were then asked what type of training needs they had found difficult to satisfy. This was an open response question, and chart 13 provides a summary of the verbatim responses using a code frame compiled from employers' answers. The most frequently given answer was IT/computing (14%). A further one in ten (11%) said they had experienced some difficulty with either NVQ and/or job-related or job-specific training. One in twelve mentioned technical/practical training or finance/accounting (both 8%) and one in seventeen (6%) health and safety.

The sample size was too small for any sub-group differences to be significant.

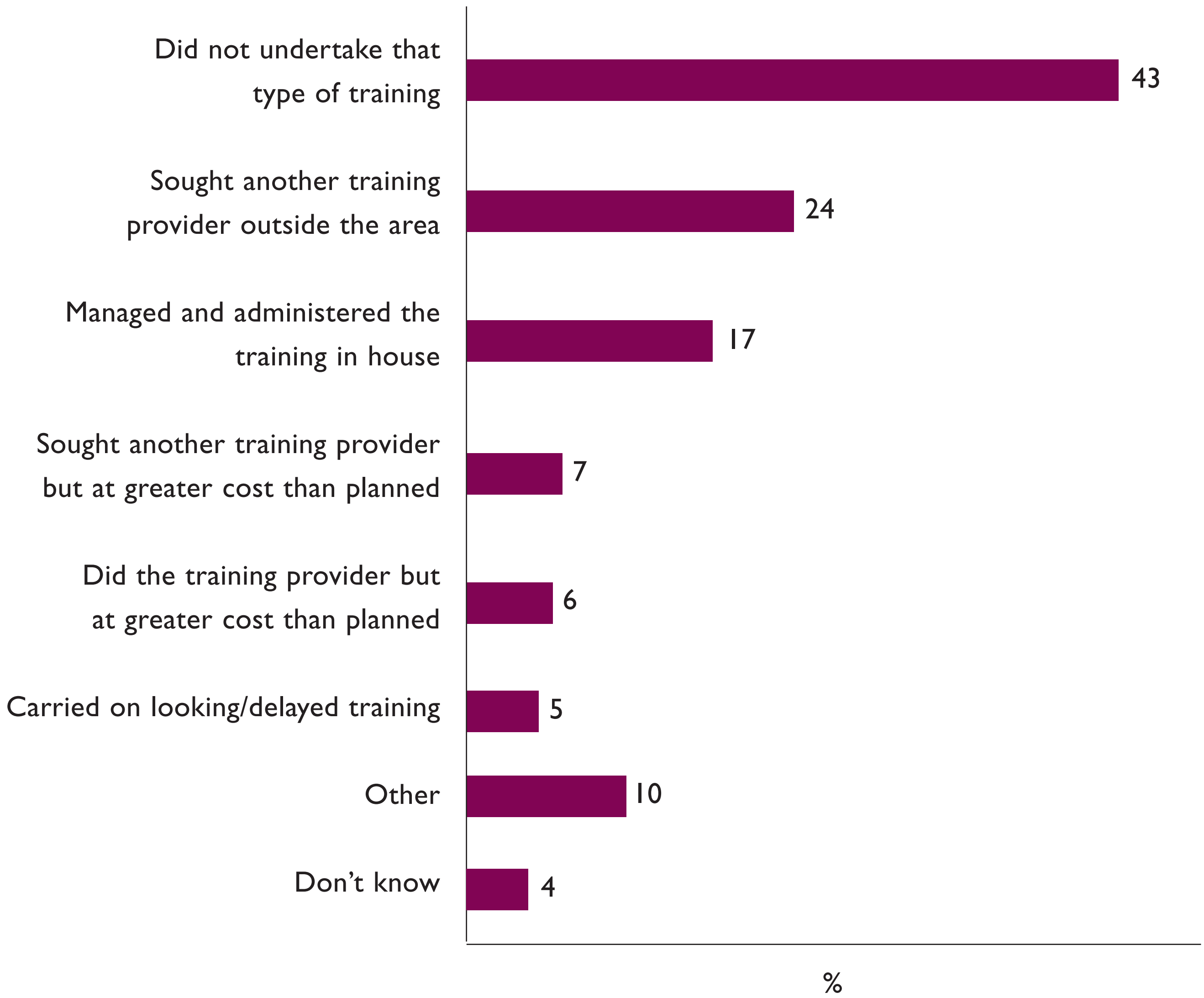
Chart 15: Training needs found difficult to satisfy through external providers



Base: All that have experienced difficulties in finding appropriate training provider (unweighted 189, weighted 175). Multiple response question. Overall responses of 3% plus shown.

The same respondents were also asked what had happened as a result of their difficulties in finding an appropriate training provider. One answer was given far more frequently than any other: more than four in ten (43%) said that as a consequence they did not undertake that type of training. A quarter said they had sought another training provider outside the area (24%) and one in six had managed and administered the training in-house (17%). Again, the base size was too small for any sub group differences to be significant.

Chart 16: What happened as a result of the difficulties?



Base: All that have experienced difficulties in finding appropriate training provider (unweighted 189, weighted 175).
Multiple response question. Overall responses of 4% plus shown.

3.6 Percentage of turnover/financial budget spent on and off-the-job training in last year

Establishments which provided either on or off-the-job training were asked what percentage of their turnover/financial budget they estimated was spent on either on or off-the-job training in the last year. Almost half (47%) said it was 1-5% of their turnover/ financial budget, less than one in ten (8%) that it was between 6 and 10%; and just 3% that it was any more than this. One in six said they had not spent anything on training (18%) and more than two in ten (22%) said they didn't know.

The proportion spent on training was highest for public administration: one in twenty (5%) said it was over 10% and a further one in ten (12%) that it was between 6-10%. Respondents in this sector though were also most likely not to know (32%). The same was true of the public sector generally, with one in seven (14%) saying it was over 5% and more than a third (36%) not knowing. For head offices of multi-site establishments, 7% said it was 11% plus and one in ten (11%) that it was between 6 and 10% – but those in subsidiary offices were more likely not to know (36%).

Those in agriculture/mining/quarrying (26%), utilities (26%) and wholesale/retail/hotels/ restaurants (29%) were more likely to say none of their turnover/financial budget was spent on training, as were establishments with 2-9 employees (23%) and those who provided only on-the-job training (30%).

3.7 Changes in investment in training over the last three years

Establishments that provided either on or off-the-job training were also asked whether they invested more, less or about the same per employee as they did three years earlier. The largest proportion said it was more (37%), with almost as many saying it was about the same (34%). Just 6% said it was less and one in ten (10%) that they had not been in operation for 3 years.

The proportion saying that the percentage of their turnover/financial budget spent on training was more than it was three years ago was significantly higher than average in North Wales (44%) and South East Wales (40%). Comparing sectors, this percentage was highest among financial and business services (47%) and, by a far greater margin, among establishments with 25 plus employees (54%) or those based in a head office of a multi-site establishment (55%). It was also higher among establishments that provided both on and off-the-job training (45%).

Public administration was the sector most likely to say that investment on training had gone down (11%), together with the public sector generally (15%). It was also slightly higher among establishments established over 10 years ago (9%).

Table 35: Percentage of turnover/financial budget (estimated) spent on training in the last year by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1,672	409	202	623	356	**85	319	184	374	312	398	668	545	459
Weighted	1,618	381	218	614	346	27	219	60	547	317	448	1,117	323	178
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
None	18	14	19	22	17	26	19	26	29	9	11	23	11	6
1-5%	47	44	49	44	54	50	62	46	41	58	39	47	46	44
6-10%	8	9	9	8	5	5	5	7	6	10	12	8	9	11
11% plus	3	4	2	4	3	3	3	2	4	2	5	3	3	6
Don't know	22	28	18	20	19	16	13	16	19	21	32	18	29	30
Refused	1	1	2	2	1	–	–	3	2	1	2	1	2	3

Note: Single response question. ** denotes small base (unweighted base less than 100). – denotes zero.

Table 36: Whether invested more, less or about the same per employee on training than three years ago by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1,672	409	202	623	356	85	319	184	374	312	398	668	545	459
Weighted	1,618	381	218	614	346	27	219	60	547	317	448	1,117	323	178
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
More	37	44	28	40	30	32	43	37	28	47	40	33	42	54
Less	6	7	7	5	8	4	5	3	3	6	11	5	9	7
About the same	34	26	38	35	41	54	35	41	41	29	27	37	31	27
Not been in operation for 3 years	10	8	8	11	11	4	9	6	12	10	8	12	6	3
Don't know	12	15	19	9	11	6	8	13	15	9	14	13	13	9

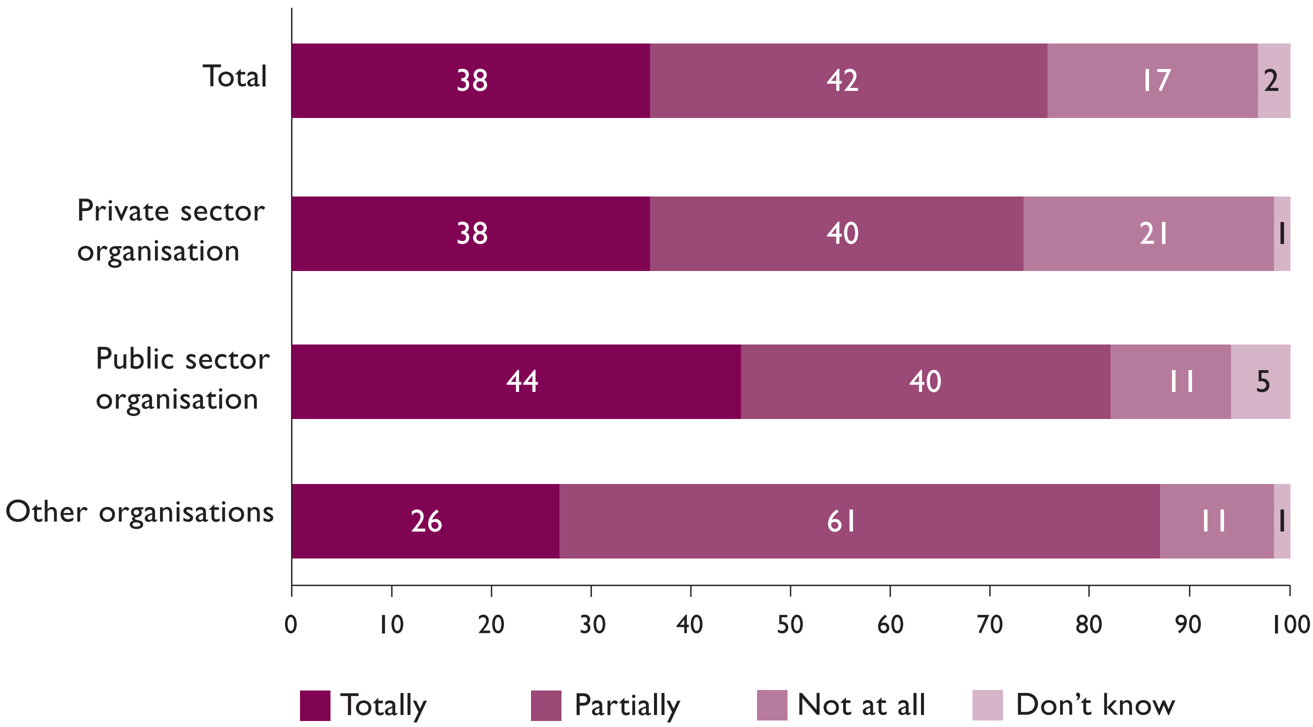
Note: Single response question.

3.8 Influence of head office of multi-site establishments on decision making about training

Establishments classified as subsidiary offices of multi-site establishments were asked to what extent their head office influenced decision making regarding training at their site. The vast majority of subsidiary offices said they were either 'totally' (38%) or 'partially' (42%) influenced by their head office.

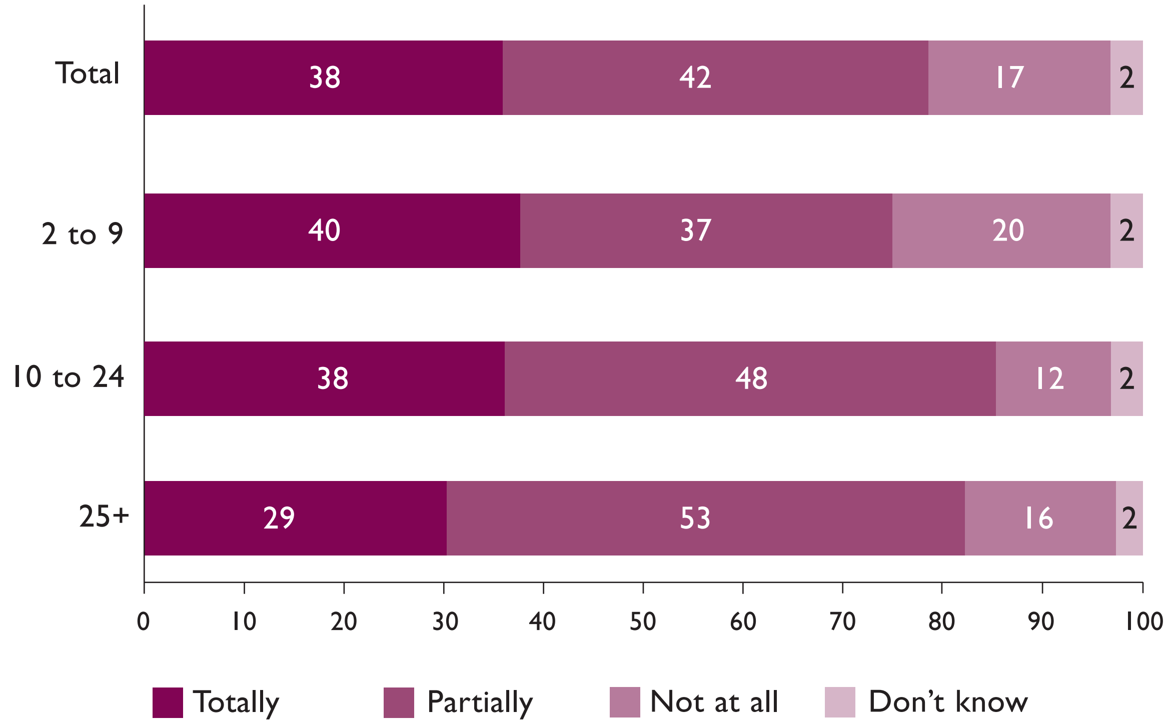
The likelihood of it being totally controlled by the head office of a multi-site establishment was greater for the public sector (44%) compared to the private sector (38%). Control from head office of a multi-site establishment was significantly lower among establishments with at least 25 employees (29% compared to 40% of the 2-9 employee size band).

Chart 17: Influence of head offices of multi-site establishments decision making about training at site by type of establishment



Base: All whose organisation is multiple site (unweighted 606, and weighted 546). Single response question.

Chart 18: Extent to which head office of multi-site establishment influences decision making regarding training at site by size band



Base: All whose organisation is multiple site (unweighted, 606 and weighted, 546). Single response question.

3.9 Summary

Two thirds of the establishments in the panel had provided on-the-job training in the last year (67%). Those with 25 plus employees (91%), in subsidiary offices of multi-site establishments (82%) and public administration (79%) or the public sector (79%) were the most likely to give this answer.

The most common type of on-the-job training that had been provided was other technical/practical skills (70%). Three in five had provided training on customer handling skills (60%) or team working skills (59%) and just over half on general IT users' skills (54%), communication skills (53%) or problem solving skills (51%). For the majority of these, establishments with 25 plus employees, subsidiary offices of multi-site establishments or the public sector were more likely to have provided training. In the case of training in communication, customer handling, team working, problem solving and using numbers, training was more likely to have been provided by the wholesale/retail/hotels/restaurants sector. Respondents in finance/business services were more likely to have provided general IT users' and IT professional skills; those in public administration, to have provided training in management skills, literacy skills and First aid.

The type of on-the-job training most likely to be provided for managers and senior managers was team working skills (36%), followed by customer handling (34%), general IT users' skills (33%) and problem solving skills (33%).

For professional occupations, it was general IT users' skills (47%) or other technical/practical skills (46%), followed by team working skills (40%). For associate professional occupations, it was other technical/practical skills (52%), general IT users' skills (47%), communication or team working skills (both 39%).

For administrative/secretarial staff, the most frequently provided type of training was in general IT users' skills (52%), followed by other technical/practical skills or customer handling skills (both 36%). The training most likely to be provided for skilled trade occupations was other technical/practical skills (46%), with team working skills (36%) and problem solving skills (33%) provided by about a third. Over half had provided training in team working skills for personal service occupations (55%) and just under half, communication skills (49%) and customer handling skills (45%). For sales/customer service occupations, almost three quarters had provided training in customer handling skills (72%) and more than a half in both team working skills (59%) and communication skills (52%).

Other technical/practical skills were the most common form of training for process/plant/machine operatives (54%), followed by team working skills (33%). For elementary occupations, the most common were team working skills (45%), then customer handling (42%) and other technical/practical skills (38%).

Just over half of respondents (55%) had provided off-the-job training in the last year. The next table, shows how the provision of off-the-job training compares to the provision of on-the-job training by the main variables used for analysis. The main points to note are that:

- almost as many establishments in the public administration sector provided off-the-job training as did on-the-job training
- provision of both types of training is very low in the agriculture/mining/quarrying sector
- the number of establishments with 25 plus employees providing both types of training was dramatically different to those employing 9 or less employees.
- establishments in North Wales were significantly more likely to offer on-the-job training but did not show the same likelihood for provision of off-the-job training.

Table 37: Comparison of training types by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Providing on-the-job training in last year	67	74	64	65	64	23	60	59	65	70	79	60	86	91
Providing off-the-job training in last year	55	55	53	53	58	34	47	41	40	63	81	48	72	84

Overall, the type of off-the-job training that had been provided most frequently was other technical/practical skills (51%). Around three in seven had provided training in management skills (44%); and around a third in communication skills (35%), team working skills (34%), general IT users' skills (33%) and customer handling skills (32%). As for on-the-job training, establishments with 25 plus employees, subsidiary offices of multi-site establishments, and also the public sector, were more likely to have provided most types of training.

For managers and senior managers specifically, management skills were, as one might expect, the most commonly provided type of off-the-job training (28%), followed by other technical/practical skills (22%) and team working skills (21%). Staff in professional occupations were most likely to have been provided with training in other technical/ practical skills (30%), and a quarter (23%) in both problem solving and management skills. For associate professional occupations, other technical/practical skills were the most frequently provided (35%), followed by general IT users' skills (21%) and communication skills (20%).

A quarter of the sample of establishments had provided general IT users' training to administrative/secretarial staff (24%). Significant proportions had also provided team working (16%) communication and other technical/practical skills (both 15%). The most commonly provided type of off-the-job training for skilled trades occupations was other technical/practical skills (29%), followed by team working skills (17%), communication or problem solving skills (both 15%).

For personal service occupations, the highest proportion of respondents had provided off-the-job training in team working skills (28%). Just over a fifth had provided off-the-job training in communication skills (23%), literacy skills (22%) or customer handling skills (21%). The type of off-the-job training that had most commonly been provided for sales/customer service occupations was customer handling skills (32%). Around a quarter had provided training on team working skills (26%), communication skills (24%) or problem solving skills (23%).

Only one type of off-the-job training had been provided with any frequency for process/plant/ machine operatives: more than a quarter (27%) had provided training in other technical/ practical skills. For elementary occupations, one in five had provided training in other technical or practical skills (19%), whilst around one in ten had either provided team working (12%), communication skills (11%) or customer handling skills (10%).

The majority of establishments (83%) were planning some type of training in the next year. The most frequently mentioned training that establishments actually planned to provide for employees in the next year was other technical/practical skills (45%). Slightly fewer mentioned team working skills (43%), customer handling skills (41%) or communication skills (39%), with just over a third intending to provide training in management skills (37%), general IT users' skills or problem solving skills (both 36%).

Past behaviour impacts on future investment in training. Establishments that provided both on and off-the-job training were more likely to plan to provide training in the future. In terms of the profiles of these establishments, the data shows that those most likely to be providing both on and off-the-job training are the larger establishments.

Almost one in ten (9%) of the sample said they had experienced difficulty over the last year in finding an appropriate training provider to meet their needs. This was slightly higher for establishments with 10 plus staff, those

in public administration, head offices of multi-site establishments, and those who provide both on and off-the-job training.

The greatest training need most frequently affected by difficulties in finding a provider was IT/computing (14%), followed by NVQ and job related/specific training (both 11%). The most common outcome was that the respondent did not undertake that type of training (43%), they sought another training provider outside the area (24%), or had managed and administered the training in-house (17%).

Almost half of the respondents estimated that between 1% and 5% of their turnover/financial budget was spent training in the last year (47%), with nearly one in ten (8%) saying it was between 6% and 10%; and just 3% that it was any more than this. The remainder of the respondents had not spent anything on training (18%) or didn't know (22%). The proportion of budget spent on training was highest for head offices of multi-site establishments, public administration and the public sector generally; though the latter were also more likely not to know.

Those in agriculture/mining/quarrying, utilities or wholesale/retail/hotels/restaurants were more likely to have spent nothing – as were establishments with 2-9 employees, or those who provided only on-the-job training.

Over a third of those providing training said they were investing more in it than three years earlier (37%). Almost as many said it was about the same level of investment (34%) and just 6% said less. The proportion saying it was more was significantly higher in:

- North Wales and South East Wales
- financial/business services
- establishments with 25 plus employees, which were the head office of multi-site establishments, or which provided both on and off-the-job training.

Those in public administration, or the public sector generally, were the most likely to say that investment on training had gone down.

The vast majority of those who worked in a subsidiary office of a multi-site establishment said their head office influenced decision making on training at their site – either totally (38%) or partially (42%). The likelihood of it being totally was greater for the public sector and for establishments that did not provide off-the-job training and lower for those with at least 25 plus employees.

4.0 FINANCIAL SUPPORT AND HELP AND ADVICE RECEIVED

4.1 Introduction

The survey explored the different types of financial support and help and advice that establishments had received with training. The issues covered were:

- financial support received for training and the sources and nature of that support
- types of financial support for training gained in the last 12 months
- help and advice received about accessing training
- usefulness of advice and reasons for any lack of usefulness
- current contact with training providers in the local area

4.2 Financial support received for training and the sources and nature of that support

This section discusses financial support received for any types of training that establishments had delivered in the last year. Financial support here included any finance from outside the organisation including sponsorship, subsidised training or grants from the government delivered through a government agency. Only those establishments which provided on or off-the-job training were asked this section of questions.

Table 38 shows that just over a quarter of establishments that provided either on or off the job training in the past year had received financial support for this training (27%), whilst two thirds (66%) were sure that they hadn't and 7% reported that they did not know. The lowest proportion of establishments receiving financial support was in the wholesale/retail/ hotels/restaurants sector (14%) and utilities (18%), and the highest was in public administration (46%). The latter figure for public administration was consistent with the findings by 'type of establishment' where just over a third (35%) of public sector establishments had received financial support, compared to nearly a quarter (24%) of those in the private sector.

Looking at other sub-groups, receipt of financial support was clearly higher among larger establishments (41% of those with 25 plus employees had received such help, compared to 23% of those with 2-9). This was only likely to be the case though, if the establishment was identified as a head office of multi-site establishment: nearly four in ten (37%) of such respondents said they had received financial support, compared to nearly a quarter (23%) of those at subsidiary offices. Within sectors, the greater likelihood of larger establishments having received financial support was evident for manufacturing/construction, wholesale/ retail/hotels/restaurants and public administration.

Nearly three in ten of those established at that site for four years or longer had received financial support for training delivered in the last year (29%), compared to one in six (18%) of those established for less than a year.



Table 38: Whether financial support was received for training delivered in the last year by sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	1,672	409	202	623	356	**85	319	184	374	312	398	668	545	459
Weighted	1,618	391	218	614	346	27	219	60	547	317	448	1,117	323	178
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	27	30	21	26	32	33	36	18	14	20	46	23	34	41
No	66	61	72	67	65	62	62	78	79	72	47	70	58	53
Don't know	7	8	7	7	3	5	2	4	8	8	8	7	7	6

Note: Single response question. ** denotes small base (unweighted base less than 100).

In terms of other variables:

- a significantly higher proportion of establishments that provided both on-the-job and off-the-job training had received financial support (36%) than those that provided either just on-the-job or off-the-job training (11% and 27% respectively)
- comparing regions, establishments in South West (32%) and North Wales (30%) were more likely to have received financial assistance than those in Mid Wales (21%)

4.3 Types of financial support for training gained in the last year

Those who had received financial support were asked what types of training they had received financial support for (this was an open response and verbatim comments were used to create a codeframe for chart 16). It should be taken into account that this data will not necessarily reflect management information relating to beneficiaries of assistance. This data will instead reflect the recall or understanding within the establishment about sources of assistance.

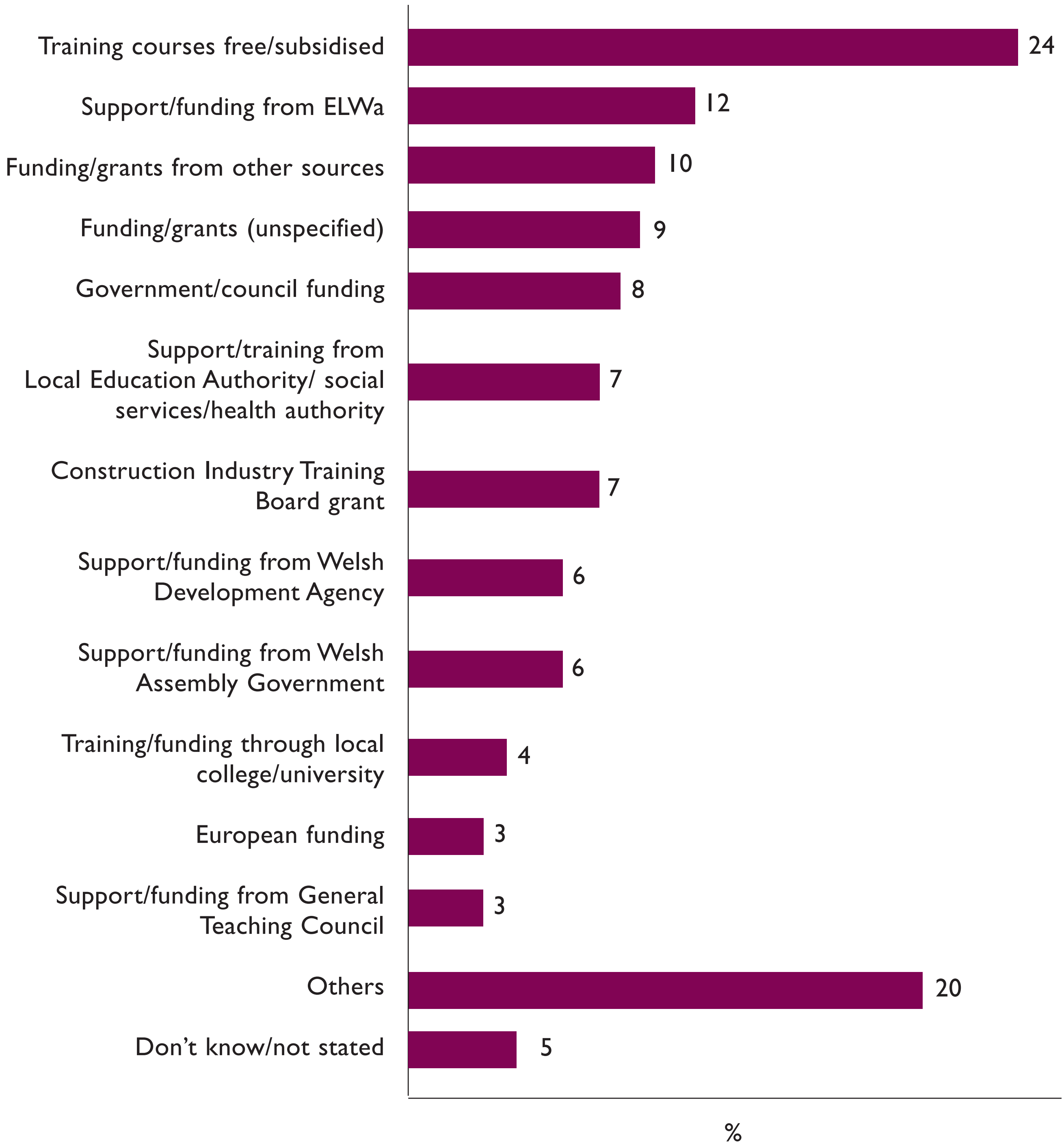
Table 39: Whether financial support was received for training delivered in the last year by type of establishment and time established

		Type of establishment			Time established at that site				
Base: All whose staff received either on or off-the-job training	Total	Private	Public	Other	Less than 1 year	1-2 years	Over 2/less than 4	Over 4 less than 10	10 years plus
Unweighted	1,672	1228	325	109	105	112	178	339	924
Weighted	1,618	1186	283	138	127	147	203	329	796
	%	%	%	%	%	%	%	%	%
Yes	27	24	35	42	18	24	26	29	29
No	66	71	55	43	77	73	67	62	64
Don't know	7	5	9	15	5	3	7	9	7

Note: Single response question.

The most commonly received type of financial support cited was training courses/free or subsidised training from sources unspecified (24%) and it is notable that employers associated 'free' training as a form of financial support. Half as many had received support from ELWa (12%); and about one in eleven, funding or grants from other sources (10%), unspecified (9%), or Government/Council funding (8%). The only sources mentioned by more than 5% were support or funding from a Construction Industry Training Board grant (7%), a Local Education Authority/Social Services or a Health Authority (7%), the Welsh Development Agency (6%) or the Welsh Assembly Government (6%).

Chart 19: Types of financial support for training in the last year



Base: All who have received financial support for any types of training they had delivered in the last year (unweighted 517, weighted 442). Multiple response question. Responses of 3% plus shown.

The survey shows that training courses/free or subsidised training were more likely to have been received by establishments with 2-9 employees (27%) and those in a single site organisation (also 27%). This was also true of those working in wholesale/retail/hotels/restaurants (36%). Establishments providing public administration (18%) or in the public sector generally (9%) were far less likely to have received any training courses/free or subsidised training.

By contrast, support from ELWa was more likely to have been received by those in establishments with 25 plus employees (30%), and those working at a multi-site organisation (22%).

Receipt of a Construction Industry Training Board grant was clearly higher among private sector establishments (11%), those with a single site (10%) and those established for ten years or more (9%). Government or Council funding was more likely to have been received by those working in the public sector (13%).

Establishments in Mid Wales (18%) and those who provided only on-the-job training were particularly likely to have received help from the Welsh Development Agency (16%). Receipt of support and training from Local Education Authorities, social services or health authorities was highest in those establishments providing public administration (14%) or with 10-24 employees (11%). Similarly those establishments providing public administration received help from the Welsh Assembly Government (10%). Those in North Wales (10%) and with 25 plus employees (10%) were more likely to have received training or funding through a local college or university.

4.4 Help and advice received about accessing training

When asked about where establishments had gained help and advice on how to access training for staff, two in five mentioned contacts in other businesses or suppliers (40%). A third said they had received help and advice from a representative at an education or training institution (35%) and just under a quarter, from the Welsh Development Agency (23%). One in five had received help from ELWa (20%), and slightly fewer from a bank manager or accountant (18%) or representative bodies such as Sector Skills Councils/Confederation of British Industry/Federation of Small Businesses/Chambers of Commerce (19%). One in seven mentioned the Welsh Assembly Government (15%) and Business Eye (12%). No other answer was given with any frequency.

There was a clear correlation between size of establishment and likelihood of having used contacts in other businesses and suppliers: establishments with 25 plus employees were far more likely to have done so (51%). This was also true of those working in the head office of a multi-site establishment (51%). Those providing public administration were far more likely to have received help and advice from a representative at an education or training institution (55%) as were larger establishments (53%) and those who provided both on and off-the-job training (51%).



Table 40: Types of financial support for training in the last year by type and nature of organisation

		Type of establishment			Nature of organisation	
Base: All whose staff received either on or off-the-job training who have received support	Total	Private	Public	Other	Single site	Multiple site but not head office
Unweighted	517	355	144	**47	286	146
Weighted	442	285	100	58	274	112
	%	%	%	%	%	%
Training courses/free/subsidised	24	31	9	18	27	17
Support/funding from ELWa	12	15	8	7	7	22
Funding grants other sources	10	6	12	30	8	13
Funding/grants (unspecified)	9	7	12	13	9	9
Government/council funding	8	7	13	6	7	12
Construction Industry Training Board Grant	7	11	*	–	10	1
Support/training from Local Education Authority/social services/health authority	7	4	16	5	6	9
Support/funding from Welsh Assembly Government	6	3	13	10	5	7
Support/funding from Welsh Development Agency	6	7	4	5	6	3

Note: Multiple response question. 'Don't know' and 'Other' not shown. Overall responses of 6% plus shown.
** denotes small base (unweighted base less than 100). * denotes less than 0.5 but greater than zero. – denotes zero.

Table 41: Types of financial support for training in the last year by region and size

		Region				Size of establishment (number of employees)		
Base: All whose staff received either on or off-the-job training who have received support	Total	North Wales	Mid Wales	SE Wales	SW Wales	2-9	10-24	25 plus
Unweighted	517	146	**57	182	113	168	170	179
Weighted	442	116	45	159	110	258	111	74
	%	%	%	%	%	%	%	%
Training courses/free/subsidised	24	22	25	23	25	27	23	15
Support/funding from ELWa	12	16	11	11	12	8	10	30
Funding grants other sources	10	10	8	12	11	12	6	12
Funding/grants (unspecified)	9	9	5	9	10	7	15	5
Government/council funding	8	9	11	7	9	7	11	7
Construction Industry Training Board Grant	7	7	1	7	7	9	5	4
Support/training from Local Education Authority/social services/health authority	7	6	3	9	4	6	11	2
Support/funding from Welsh Assembly Government	6	6	10	5	6	5	7	7
Support/funding from Welsh Development Agency	6	5	18	6	1	7	5	4

Note: respondents were given the definition of part time as being between 8 and 31 hours per week.
'Don't know' not allowed in interview (ranges were given and accepted as alternative response). Single response question.



Table 42: Sources of help and advice in the last year by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Contacts in other businesses or suppliers	40	40	35	40	42	29	43	36	34	47	43	37	46	51
Representatives at education/ training institution	35	41	35	31	35	26	34	26	23	34	55	30	46	53
Welsh Development Agency	23	28	24	21	21	24	24	19	19	25	28	22	25	29
ELWa	20	25	23	18	17	26	17	12	11	18	39	16	29	39
Representative bodies	19	21	17	18	22	10	18	13	12	23	31	18	22	28
Bank manager/ accountant	18	19	20	19	13	29	24	27	19	16	9	19	14	10
Welsh Assembly Government	15	21	15	11	15	20	8	5	6	8	38	13	21	19

Table 42: Sources of help and advice in the last year by region, sector and size of establishment (continued)

Base: All respondents	Total	Region: North Wales	Mid Wales	SE Wales	SW Wales	Sector: Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	Size of establishment (number of employees): 2 -9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Business Eye	12	11	15	12	12	12	15	9	10	16	10	12	11	11
Industry/ sector governing body	3	2	2	4	3	1	4	3	2	6	4	3	2	3

Note: Multiple response question. Overall responses of 3% plus shown. 'Don't know' and 'Other' not shown.

Help from the Welsh Development Agency was more likely to have been received by establishments in North Wales (28%), those with 25 plus employees (29%) and those providing public administration (28%). A similar pattern was true for help and advice from ELWa, with 25% of establishments in North Wales and 39% of those in larger establishments and public administration giving this answer (also 39%). ELWa was also cited by slightly more establishments providing on and off-the-job training (31%) and those based in the head office of a multi-site establishment (29%). However, it is worth noting that ELWa was significantly less likely to have been used for help and advice by organisations that had been established for 2 years or less (12%).

The most likely to say they had gone to their bank manager or accountant for help were establishments with up to 9 employees (19%); those in the private sector (20%); and especially those established for less than a year (26%) or providing no training (24%).

Of the remaining sources of help and advice:

- those in public administration (31%), in a head office of a multi-site establishment (33%), establishments with 25 plus employees (28%) or those providing both on and off-the-job training (28%) were the most likely to have received help from representative bodies
- the Welsh Assembly Government was most frequently mentioned as a source of help and advice by public sector respondents (31%), those in agriculture/mining/quarrying (20%), those providing both on and off-the-job training (21%) and those in North Wales (21%)
- Business Eye was most mentioned by organisations established for less than a year (23%) or between 2 and 4 years (also 23%)

4.5 Usefulness of help and advice and reasons for any lack of usefulness

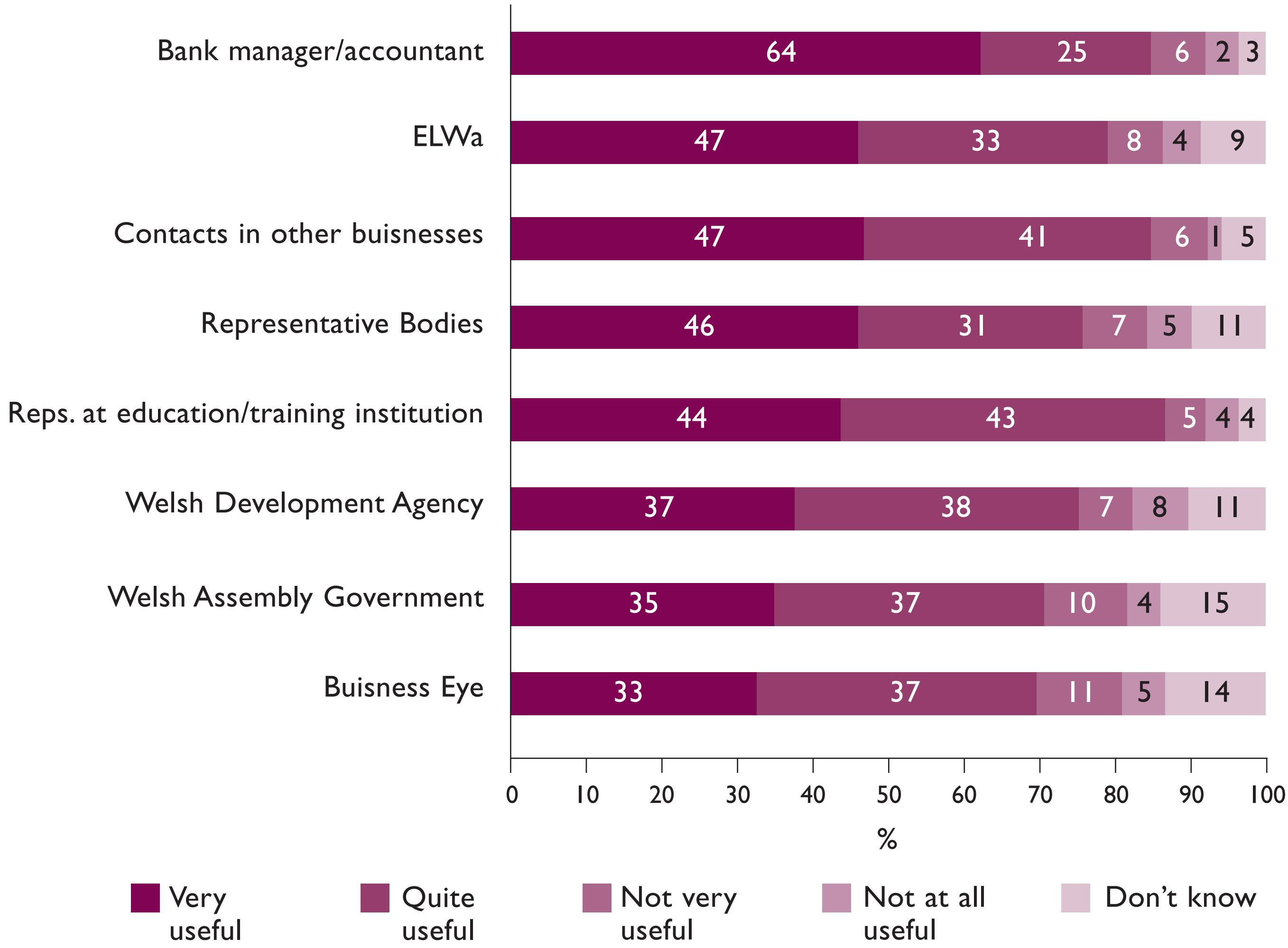
The most useful source of help and advice about accessing training was a bank manager/ accountant (64% or users finding them very useful and 88% very or quite useful). Sources of help and advice with between three and four in ten of their users rating them as very useful were:

- ELWa (49% of users found the help and advice very useful)
- contacts in other businesses or suppliers (48% very useful)
- representative bodies (48% very useful)
- representatives at education or training institutions (44% very useful)

Less than four in ten users rated the following sources of help and advice about accessing training as very useful:

- Welsh Development Agency (37% very useful)
- Welsh Assembly Government (37% very useful)
- Business Eye (33% very useful)

Chart 20: Usefulness of help and advice on how to access training



Base: all respondents using each source in last year (bases vary). Single response (usefulness rating) per source.
'Don't know' not shown. Only precoded entities present in the above chart due to only a small number of other mentions.

Robust sub group analysis was not possible as the base sizes were generally too small for differences to be significant. However, assigning a score of 0 to not at all useful and 3 to very useful, the mean score (out of total score of 3) for usefulness of advice from a representative at an education or training institution was slightly higher for those in the head office of multi-site establishments (2.54), the public sector (2.42) and those providing off-the-job training (2.42). Those in Mid and South East Wales were slightly more likely to find the advice from other businesses and suppliers to be useful (2.49 and 2.50). The highest ratings for ELWa were in the South West (2.46).

Respondents who rated each source of help and advice as anything other than very useful were asked why they had given this rating. This question was an open question and all responses have been coded. The following sections on sources of help and advice show some coded responses that are relatively complementary. For instance, whilst some respondents will not have rated the service very useful, a high proportion will have said that they were given good advice. This said, getting good or helpful advice had not prompted them to give the top rating response of very useful.



4.5.1 Usefulness of advice from bank manager/accountant

Bank managers and accountants were cited by all respondents more often than any other body as providing very useful (64%) help and advice about accessing training. A quarter (24%) had received quite useful advice whilst 6% had found the advice or help not very useful and 2% not at all useful.

The most common negative comment from the respondents who rated advice from the bank manager/accountant as anything other than very useful was that it was not relevant (14%). Other than that, one in twenty five (4%) said that their bank manager/accountant was not interested in helping, and one in thirty three (3%) said that they had no choice but to use them and that the training provided was poor.

Some typical quotes from respondents rating advice as anything other than useful were as follows:

"Because they were able to show me different options and enable me to make a choice"

"They pointed out different things that we wouldn't have thought of before"

"They could not give me relevant information."

Table 43: Reasons why help/advice from bank manager/accountant was less than very useful

	%
Gave good/helpful/relevant advice/information	18
Information/advice not relevant/specific to our company/advice too general	14
Experienced/know what they are talking about/understand our company	9
Told us where to look/who to contact/pointed us in the right direction	6
Not interested in helping you/only interested in money/profit/sales	4
Gave us what we asked for/required	3
Poor training course/wasn't relevant to our needs	3
No choice/have to use them/not my decision	3
Don't know/no answer	14

Base: All that thought advice was less than very useful (unweighted 125, weighted 118). Note: Open/multiple response question. Overall responses of 3% plus shown. 'Other' not shown. Negative comments have been highlighted by shading.

4.5.2 Usefulness of advice from ELWa

The majority of all the respondents who received advice about accessing training from ELWa indicated that it was either very (49%) or fairly (32%) useful. However, one in ten indicated it was either not very useful (7%) or not at all useful (4%). The four in ten (43%) respondents who had used ELWa for advice or help and who gave less than a very useful rating were asked why.

ELWa were least likely of all the sources of help and advice used to receive negative comments or criticism from those who rated their advice as anything other than very useful. Just 4% of these respondents said that the information and advice received from ELWa was not relevant. A further one in twenty five (4%) said that they already knew what they had been told, whilst one in thirty three (3%) said that they had to push or chase them to get information, there were no good or appropriate training courses available, they couldn't help, communicated badly or that they didn't understand their business.

"When they approached us initially they were very interested in signing up our staff who wanted to go on apprenticeships. They bought all information with them and took us through it all and were very helpful but not as quick at responding now though as they have been in the past."

"The level of skills needed are quite high therefore the level of training has to be highly tailored. General training is not really useful to us, we need specialist training which comes from within the group."

4.5.3 Usefulness of advice from contacts in other businesses/suppliers

The advice received from contacts in other businesses/suppliers was generally perceived by all the respondents who received advice from this source to be useful. A half (48%) stated that it was very useful and a further four in ten (41%) quite useful; only one in fourteen (7%) indicated that it was either not very (6%) or not at all useful (1%).

Of the half (48%) of respondents who cited that the help and advice received was anything other than very useful – and who were asked why they gave this response 6% felt that the information and advice they were given was not relevant to them, it was too general. Other criticisms which were mentioned by at least 2% included:

- already knew what they told us/not new information (3%)
- no good or appropriate training courses (2%)
- not enough information given/not comprehensive (2%)



Table 44: Reasons why help/advice from ELWa was less than very useful

	%
Gave good/helpful/relevant advice/information	13
Good training course/found the right/relevant course	10
Told us where to look/who to contact/pointed us in the right direction	9
Information/advice not relevant/specific to our company/advice too general	4
Helped us get/provided us with funding	4
Already knew what they told us/not new information	4
Gave us what we asked for/required	4
Experienced/know what they are talking about/understand our company	3
No good/appropriate/relevant training courses available	3
Poor communication/difficult to contact/don't get back to us	3
Couldn't help/no information/advice given	3
Not experienced/know what they are talking about/don't understand our business	3
Had to push/chase them to get help/information	3
Don't know/No answer	13

Base: All that thought advice was less than very useful (unweighted 219, weighted 181).
Note: Open/multiple response question. Overall responses of 3% plus shown 'Other' responses not shown.
Negative comments have been highlighted by shading.

Table 45: Reasons why help/advice from contacts in other businesses/suppliers was less than very useful

	%
Gave good/helpful/relevant advice/information	17
Experienced/know what they are talking about/understand our company	15
Told us where to look/who to contact/pointed us in the right direction	7
Information/advice not relevant/specific to our company/advice too general	6
Gave us what we asked for/required	4
Already knew what they told us/not new information	3
Don't know/No answer	15

Base: All that thought advice was less than very useful (unweighted 391 weighted 380).
Note: Open/multiple response question. 'Other' not shown. Overall responses of 3% plus shown.
Negative comments have been highlighted by shading.

4.5.4 Usefulness of representative bodies

Again those respondents who had used a representative body for help or advice about accessing training generally found that it was either very (48%) or fairly (31%) useful. Just over one in ten indicated that it was either not very (7%) or not at all useful (5%).

Of those respondents rating the help and advice they had received as anything other than very useful the most negative comment made was that they were unable to help or provide any information or advice to those who contacted them (7%). A further one in seventeen (6%) indicated that the advice or information given was not relevant – it was either too specific or too general.

Some typical quotes from this sample of respondents were as follows:

"They tend to be dismissive and don't help you more than they have to"

"It just wasn't applicable to what we were looking for it wasn't their fault just the advice didn't apply to what we needed…that's it"



Table 46: Reasons why help/advice from representative bodies was less than very useful

	%
Gave good/helpful/relevant advice/information	21
Told us where to look/who to contact/pointed us in the right direction	9
Experienced/know what they are talking about/understand our company	7
Couldn't help/no information/advice given	7
Good communication/easy to contact/keep us updated	6
Information/advice not relevant/specific to our company/advice too general	6
Good training course/found the right/relevant course	4
Good/satisfied/found them helpful/useful (unspecified)	3
No answer	11

Base: All that thought advice was less than very useful (unweighted 156, weighted 153).
Note: Open/multiple response question. 'Other' not shown. Overall responses of 3% plus shown.
Negative comments have been highlighted by shading.

4.5.5 Usefulness of advice from representatives at educational/ training institution

Of the respondents who had received help and advice about accessing training from representatives at education/training institutions, more than four in ten (44%) cited that they were very useful or quite useful (43%). One in ten reported they were either not very useful (5%) or not at all useful (4%).

Of the respondents who cited anything other than very useful, and who were asked why they gave this response, the negative explanation given most often was that the advice had been too general/not relevant (8%).

Some typical quotes from the one in thirteen (8%) respondents who made this negative comment were as follows:

"Because they don't solve our individual problems or needs. They generally give general advice and don't move beyond that. They seem to have features that prevent them from giving specific advice."

"Because when I contacted them they didn't have a clue about what I was talking about."

"Took more phone calls than we needed… trying to track someone down … took quite a while/but quite helpful."

"Told us what course we needed to do but did not give us enough information about it."

Table 47: Reasons why help/advice from education or training institutions was less than very useful

	%
Gave good/helpful/relevant advice/information	22
Good training course/found the right/relevant courses	13
Told us where to look/who to contact/pointed us in the right direction	8
Information/advice not relevant/specific to our company/advice too general	8
Gave us what we asked for/required	5
Other positive comments	5
Experienced/know what they are talking about/understand our company	4
Other negative comments	4
Good communication/easy to contact/keep us updated	3
Gave a lot of information/found out extra information	3
No good/appropriate/relevant training courses available	3
Don't know/No answer	9

Base: All that thought advice was less than very useful (unweighted 384, weighted 354).
Note: Open/multiple response question. 'Other' not shown. Overall responses of 3% plus shown.
Negative comments have been highlighted by shading.

4.5.6 Usefulness of advice from the Welsh Development Agency (WDA)

Three quarters of the respondents who had used the WDA for help and advice about how to access training reported that the help was either very useful (37%) or quite useful (38%). However, one in fourteen (7%) indicated the advice was not very useful, and a further one in thirteen (8%) not at all useful. Respondents who did not rate the advice as very useful were asked to clarify why.

The majority of criticism was that the information and advice was not relevant (9%). The comment that the WDA did not deal with their sector was made by one in seventeen (6%) respondents, with one in twenty (5%) saying they couldn't help. Comments that the WDA were too slow or that their communication was poor were made by one in twenty five (4%).



Some typical quotes from this sample of respondents were as follows:

"Not very relevant to our needs – was not useful advice. It would have necessitated spending money which we did not have."

"Too bureaucratic."

"Tried to get hold of someone – could do with more access to advisors."

Table 48: Reasons why help/advice from Welsh Development Agency was less than very useful

	%
Gave good/helpful/relevant advice/information	24
Told us where to look/who to contact/pointed us in the right direction	11
Information/advice not relevant/specific to our company/advice too general	9
Gave us what we asked for	6
They don't deal with our sector/companies like ours/turned us away	6
Couldn't help/no information/advice given	5
Good training course/found the right/relevant course	5
Experienced/know what they are talking about/understand our company	4
Poor communication/difficult to contact/don't get back to us	4
Too slow/took too much time	3
Good communication/easy to contact/keep us updated	3
Don't know/No answer	10

Base: All that thought advice was less than very useful (unweighted 156, weighted 153).
Note: Open/multiple response question. 'Other' not shown. Overall responses of 3% plus shown.
Negative comments have been highlighted by shading.

4.5.7 Usefulness of advice from the Welsh Assembly Government (WAG)

Nearly three quarters of those who had used the WAG for advice or help about accessing training had found them to be either very (37%) or fairly (36%) useful. However, just under one in ten (9%) reported them as not very useful, and a further one in twenty five (4%) as not at all useful. Of the half (49%) who rated them as less than very useful one in eight respondents said that the information or advice provided by the WAG was not relevant (13%). About half as many said that the WAG couldn't help (7%) and 3% said they were either too slow, they did not know what they were talking about, they did not understand the respondent's business, or that some of their advice was helpful and some of it was not.

Some typical quotes from this sample of respondents were as follows:

"They have a lot of experience and offer good support"

"Not very relevant to our needs…was not useful advice…necessitated spending money which we did not have"

"They directed us to the right useful place…/they also informed us of funding available"

Table 49: Reasons why help/advice from Welsh Assembly Government was less than very useful

	%
Gave good/helpful/relevant advice/information	19
Information/advice not relevant/specific to our company/advice too general	13
Told us where to look/who to contact/pointed us in the right direction	7
Couldn't help/no information/advice given	7
Gave us what we asked for/required	6
Helped us get/provided us with funding	6
Good communication/easy to contact/keep us updated	4
Too slow/took too much time	3
Not experienced/know what they are talking about/don't understand our business	3
Some information/advice is helpful/useful, some is not	3
Don't know/No answer	14

Base: All that thought advice was less than very useful (unweighted 152, weighted 149).
Note: Open/multiple response question. Overall responses of 3% plus shown. 'Other' responses not shown.



4.5.8 Usefulness of advice from Business Eye

Just under seven in ten of those who had sought advice about accessing training or help from Business Eye indicated it was either very (33%) or fairly (36%) helpful. However, one in ten (11%) reported that it was not very useful whilst a further one in twenty (5%) had found the advice or help not at all useful.

Of those who rated the help and advice as anything other than very useful the most cited negative comment about Business Eye was that the information was not relevant (17%). The other responses giving criticism of Business Eye were related to: relevancy; that they did not offer the training courses needed; that they did not deal with the respondents sector; and that they did not understand their business.

Some typical quotes from this sample of respondents were as follows:

"…because we didn't fit wholly into retail or agricultural. Business Eye wasn't able to help us – they are more retail orientated."

"They don't really understand our business."

"Well at the end of the day I found them very helpful but they couldn't help out our company – they were unable to help purely because of the business we are in."

"Just that they don't have what we require... training in book keeping and marketing… not anything we wanted."

4.6 Current contact with training providers in local area

All respondents were asked what contact, if any, they had with providers in their local area in the last year. By far the most common form of contact with was through information sent by the post, phone calls or email (63%). Around a third mentioned the following:

- they had received visits from representatives (35%)
- providers had arranged placements in their organisation (35%)
- as employers they had sent staff on training courses at a provider (34%)
- they had provided feedback on training course content where staff had used services (33%)

Three in ten had attended networking events arranged by the provider (29%) and 6% sat on the Board of a local college.

Table 50: Reasons why help/advice from Business Eye was less than very useful

	%
Gave good/helpful/relevant advice/information	18
Information/advice not relevant/specific to our company/advice too general	17
Told us where to look/who to contact/pointed us in the right direction	15
Good/satisfied/found them helpful/useful (unspecified)	5
They don't deal with our sector/companies like ours/turned us away	5
No good/appropriate/relevant training courses available	5
Gave a lot of information/found out extra information	4
Not experienced/know what they are talking about/don't understand	4
Provided an external perspective/insight	3
Already knew the information that they told us/not new information	3
Couldn't help/no information/advice given	3
Don't know/No answer	14

Base: All that thought advice was less than very useful (unweighted 133, weighted 128).
Note: Open/multiple response question. 'Other' not shown. Overall responses of 3% plus shown.
Negative comments have been highlighted by shading.

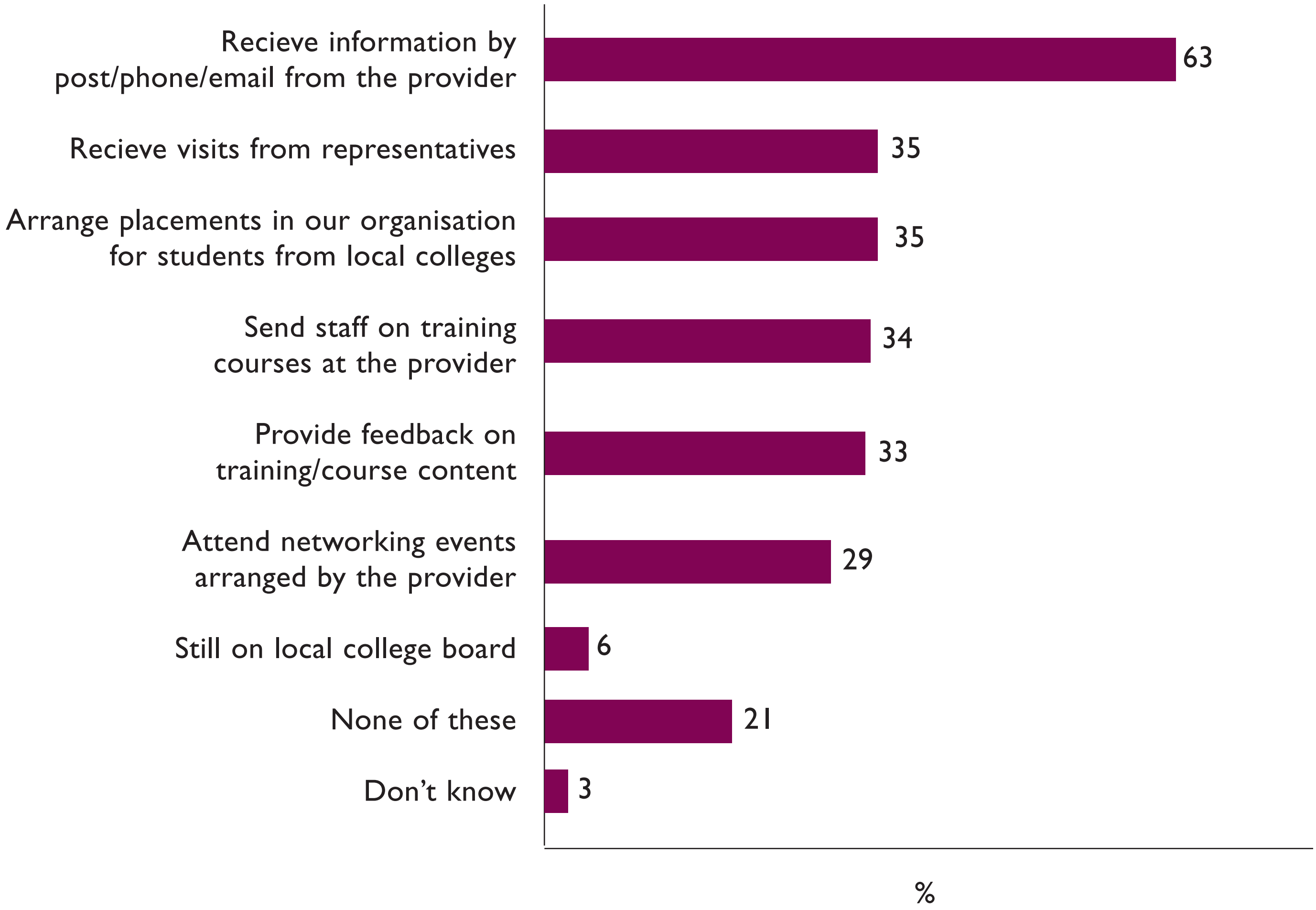
There were striking differences between employment sectors. There was a relative lack of contact with establishments of 2-9 employees, and with those in the private sector. Those providing public administration were far more likely to send staff on training courses at the provider (62%), attend networking events arranged by the provider (53%), receive information in the post or via phone calls and emails (81%), and receive visits from representatives (49%). Likewise, those in establishments with 25 plus employees were far more likely to have each of these forms of contact. Other than for utilities, this was also true within each sector.

Respondents based at their organisation's head office of a multi-site establishment were slightly more likely to have each type of contact as in most cases, were those who provided both on and off-the-job training. The longer established organisations were more likely to receive information (by post, phone or email) from providers or to arrange placements for students from local colleges.

There were slight differences by region, with those in North Wales the most likely to send staff on training courses at the provider (40%), to receive visits from representatives (41%) and to provide feedback on training/course content (39%).



Chart 21: Current forms of contact with training providers in local area



Base: All respondents (unweighted 2059, weighted 2059). Multiple response question.
Overall responses of 3% plus shown. 'Other' responses not shown.

Table 51: Current forms of contact with training providers in region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Receive information by post/ phone/email from the provider	63	65	60	64	60	58	58	53	52	65	81	58	73	78
Receive visits from representati- ves	35	41	27	38	31	29	34	27	32	28	49	30	48	55
Arrange placements in our establishment for students from local colleges	35	41	33	32	35	18	27	21	27	29	60	29	48	58
Send staff on training courses at provider	34	40	32	32	28	22	27	23	21	31	62	27	50	60



Table 51: Current forms of contact with training providers in region, sector and size of establishment (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Provide feedback on training/ course content	33	39	25	31	31	21	27	24	22	30	58	27	49	53
Attend networking events arranged by the provider	29	32	28	28	29	22	15	22	18	34	53	26	36	44
None of these	21	17	20	22	24	26	25	29	27	19	8	25	10	7

Note: Multiple response question. 'Don't know' and 'Other' not shown.
Overall responses of 21% plus shown.

4.7 Summary

Just over a quarter of establishments that had delivered on or off-the-job training in the last year had received financial support (27%). The figure was lowest in the wholesale/retail/hotels/restaurants sector (14%) and highest for the public administration sector (46%). It was also highest for establishments with 25 plus employees (41%) and those providing both on and off-the-job training (36%).

The type of financial support most commonly received was with training courses/free/subsidised training (24% of those receiving financial support). Other mentions were support from ELWa (12%), funding or grants from other sources (10%), funding grants unspecified (9%), Construction Industry Training Board grants (7%), Government/Council funding (8%), support from the Welsh Development Agency (6%) and support from Local Education Authority/social services/health authority (7%).

Training courses/free/subsidised training were more likely to have been provided for establishments with 2-9 employees (27%). Support from ELWa was more likely to have been received by those in the largest establishments (30%), multi-site establishments (22%) and those who provide both on and off-the-job training (15%).

Establishments classified as neither public nor private sector were the most likely to have obtained funding or grants from other sources (30%). The most likely to have received a Construction Industry Training Board grant were those in the private sector (11%), with a single site (10%) and in manufacturing/construction (37%).

Establishments in Mid Wales (18%) or who provided only on-the-job training (16%) were particularly likely to have received support from the Welsh Development Agency. Receipt of financial support or training from Local Education Authorities/social services/health authorities and Welsh Assembly Government was highest for establishments providing public administration (14%).

The most common source of help and advice on how to access training for staff was contacts in other businesses or suppliers (40%). A third said they had received help and advice from a representative at an education or training institution (35%) and just under a quarter, from the Welsh Development Agency (23%). Approximately one in six had received help from ELWa (20%), representative bodies such as Sector Skills Councils, Confederation of British Industry, Federation of Small Businesses or Chambers of Commerce (19%) or a bank manager/accountant (18%).

Establishments with 10 plus employees were far more likely to have gained help and advice from contacts in other businesses and suppliers (48%) and from a representative at an education or training institution (49%) than establishments with 2-9 employees. Similarly, those in the public administration sector (55%) and those who provide both on and off-the-job training (51%) reported gaining help and advice from representatives at an education or training institution. Public administration establishments (39%) and agriculture/mining/quarrying (26%) received more help from ELWa, as did those with 25 plus employees (39%) and those based in North Wales (25%). A similar pattern was evident for help and advice from Welsh Assembly Government.

Establishments with up to 9 employees (19%) and those in the private sector (20%) were the most likely to say they had gone to their bank manager/accountant for help and advice. Those in public administration, a head office of multi-site establishment (33%), with 10 plus employees (24%) or providing both types of training were the most likely to have received help from representative bodies (28%).



The Welsh Assembly Government was the most frequently mentioned source of help and advice for establishments in the public or other sector (31% for both); in agriculture/mining/ quarrying (20%); in public administration (38%) and those providing both types of training (21%).

The most useful source of help or advice was a bank manager/accountant (64% of users rating them very useful). This was followed by: contacts in other businesses/suppliers (rated very useful by 48% of users), and ELWa (49%); representative bodies (48%); and representatives at an education or training institution (44%). The most common criticism of all sources of help and advice was a lack of relevance.

By far the most commonly received current form of contact with training providers in the local area was information sent via post/ telephone/email (63%). About a third said they received visits from provider representatives (35%), arranged placements in their organisation for students from local colleges (35%), sent staff on training courses at the provider (34%), or had provider feedback on training course content where staff had used services (33%).

Establishments providing public administration, those with 25 plus employees, those who are the head office of multi-site establishment, and who provide both on and off-the-job training, were more likely to have each of these forms of contact with training providers.

5.0 ATTITUDES TO TRAINING

5.1 Introduction

This section tested levels of agreement with a series of statements exploring the establishment's attitude towards training. The issues covered included:

- The adequacy of the amount of training provided for staff roles
- Seeking training information and assessment of staff skills
- The impact of time pressures and difficulty of providing staff cover on training provision
- Working with providers to develop training programmes
- Mandatory training within the training budget
- The priority that training takes
- The impact of training on staff confidence
- Encouragement to staff to keep up to date with industry developments
- The problem of staff disinterest in training
- The value placed on staff
- The role of training in maintaining competitiveness

5.2 Current attitudes towards on-the-job training

Attitudes to training were first explored in a question recording levels of agreement or disagreement with statements about training at the respondent's location (the agreement scale was strongly agree to strongly disagree). Nine statements were read out and the ranked order of agreement is shown in the next table.

The highest level of agreement was with the statement that 'our staff get about the right amount of training for their roles' (79% agreed, of whom 44% agreed strongly). Just over seven in ten agreed that: 'we actively seek advice or information about training that is relevant to our industry/profession' (73% agreed, of whom 42% agreed strongly); and also that 'we formally assess people's skills on a regular basis' (72% agreed, of whom 42% agreed strongly). Two thirds agreed that 'time pressures make it difficult to accommodate training for staff' (66% agreed, of whom 36% agreed strongly), whilst just over two in ten (22%) disagreed. Four in seven agreed that 'it is difficult to arrange cover whilst staff are undertaking training' (58%), with three in ten disagreeing (29%).

Four statements gained agreement from less than half of the sample. Just under half agreed that 'we tend to work with providers to develop our own training programmes' and 'not much changes in our organisation so apart from training new staff there is not much need for training' (both 47%). However, a third disagreed with the former statement (32%), and disagreement with the latter was as high as 45%.

40% agreed that 'most of our training budget is spent on mandatory training', with more than a third (36%) disagreeing. 'Training is not one of our priorities' was the one statement for which disagreement exceeded agreement (66% compared to 27%), with more than four in ten (44%) disagreeing strongly.



Table 52: Agreement with statements about training at the location

Base: All respondents	All agree	Strongly agree	All disagree	Strongly disagree
	%	%	%	%
Our staff get about the right amount of training for their roles	79	44	11	2
We actively seek advice or information about training that is relevant to our industry/profession	73	42	12	5
We formally assess people's skills on a regular basis	72	42	17	6
Time pressures make it difficult to accommodate training for staff	66	36	22	9
It is difficult to arrange cover whilst staff are undertaking training	58	36	29	14
We tend to work with providers to develop our own training programmes	47	22	32	15
Not much changes in our organisation so apart from training new staff there is not much need for training	47	26	45	26
Most of our training budget is spent on mandatory training	40	20	36	16
Training is not one of our priorities	27	14	66	44

Note: single response (level of agreement) per statement.

In order to explore the statements easily, the above list has been split into sub-sections:

Statements related to the priority/provision of training:

- Our staff get about the right amount of training for their roles
- Time pressures make it difficult to accommodate training for staff
- Not much changes in our organisation so apart from training new staff there is not much need for training
- Most of our training budget is spent on mandatory training
- Training is not one of our priorities

Statements related to the planning of training:

- We actively seek advice or information about training that is relevant to our industry/profession
- We formally assess people's skills on a regular basis
- It is difficult to arrange cover whilst staff are undertaking training
- We tend to work with providers to develop our own training programmes

5.1.1 The priority/provision of training

Looking at the statements in detail, the following points have been observed:

- agriculture/mining/quarrying as a sector was least likely to agree strongly that staff are getting the right amount of training, or that most of their budget is spent on mandatory training. Conversely, they are most likely to agree that training is not one of their priorities.
- the establishments with 25 plus employees were least likely to agree strongly that time pressures create problems, and that apart from training new staff there is not much need for training.
- the utility sector was least likely to strongly agree that time pressures made it difficult to accommodate training for staff.

5.1.2 The planning of training

Points to be made from the examination of responses are that:

Most sectors had lower levels than average of respondents who strongly agreed (compared to the average) that they sought advice about training that is relevant; in contrast, levels of strong agreement were extraordinarily high in public administration

The public administration sector and the establishments with 25 plus employees were most likely to agree strongly that they formally assessed people's skills

The wholesale/retail/hotels/restaurants sector was most likely to agree strongly that finding cover for training is a problem

Agriculture/mining/quarrying and also finance/business services were least likely to agree strongly that providing cover is a problem and that they worked with providers to develop programme to fit their needs.



Table 53: Priority/provision of training by region, sector and size of establishment (groups expressing higher or lower levels of strong agreement than the average)

	High levels of agreeing strongly (at least 5% points above average)	Lower levels of agreeing strongly (at least 5% points below average)
Our staff get about the right amount of training for their roles	Sector: Wholesale/retail/hotels/restaurants	Size: 10-24 Region: SW Wales Sector: Agriculture/mining/quarrying
Time pressures make it difficult to accommodate training for staff	Region: Mid Wales	Size: 25 plus Sector: Utility
Not much changes in our organisation so apart from training new staff there is not much need for training	Sector: Wholesale/retail/hotels/restaurants Sector: Utility Sector: Manufacturing/construction Region: Mid Wales	Sector: Finance/business services Sector: Public Administration Size: 10-24 Size: 25 plus
Most of our training budget is spent on mandatory training		Sector: Agriculture/mining/quarrying
Training is not one of our priorities	Sector: Agriculture/mining/quarrying	Sector: Public Administration Size: 10-24 Size 25 plus

Table 54: Agreement with statements related to priority/provision of training by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Our staff get about the right amount of training for their roles														
Strongly agree	44	45	45	46	39	33	42	44	51	38	40	45	39	41
Tend to agree	35	29	37	35	39	35	36	37	32	38	35	33	39	41
Tend to disagree	9	12	8	8	10	6	10	5	8	12	11	9	12	10
Strongly disagree	2	2	2	2	3	4	2	2	1	2	4	2	3	3
Time pressures make it difficult to accommodate training for staff														
Strongly agree	38	35	44	39	35	36	41	33	39	35	36	39	37	29
Tend to agree	28	27	26	28	31	20	28	30	26	31	29	27	32	34
Tend to disagree	13	15	12	13	14	11	11	18	14	10	16	13	15	17
Strongly disagree	9	10	11	8	8	8	8	6	9	12	8	9	7	11



Table 54: Agreement with statements related to priority/provision of training by region, sector and size of establishment (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Not much changes in our organisation, so apart from training new staff there is not much need for training														
Strongly agree	26	22	31	28	24	30	35	32	33	21	10	30	14	9
Tend to agree	21	18	23	20	23	30	26	29	25	17	11	24	13	10
Tend to disagree	19	20	13	19	23	14	14	16	16	26	24	17	25	27
Strongly disagree	26	30	24	26	21	13	18	15	17	28	46	20	41	48
Most of our training budget is spent on mandatory training														
Strongly agree	20	20	17	22	22	15	23	22	21	21	19	20	20	22
Tend to agree	20	24	29	16	18	21	24	28	22	12	20	19	25	23
Tend to disagree	20	23	16	19	20	16	18	14	16	26	22	18	23	26
Strongly disagree	16	11	14	20	16	17	14	10	15	20	18	17	13	14

Table 54: Agreement with statements related to priority/provision of training by region, sector and size of establishment (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Training is not one of our priorities														
Strongly agree	14	11	17	15	15	25	18	14	18	12	5	17	7	5
Tend to agree	13	10	18	12	17	24	16	22	16	9	9	16	7	5
Tend to disagree	22	23	20	22	21	20	20	22	22	30	15	22	21	19
Strongly disagree	44	48	38	44	41	21	35	33	35	43	68	37	60	67

Note: Single response question. 'Don't know' and 'Other' responses not shown.



Table 55: Planning of training overview by region, sector and size of establishment

	High levels of agreeing strongly (at least 5% points above average)	Lower levels of agreeing strongly (at least 5% points below average)
We actively seek advice or information about training that is relevant to our industry/profession	Sector: Public administration Size: 10-24 Size: 25 plus	Region: Mid Wales Sector: Agriculture/mining/quarrying Sector: Manufacturing/construction Sector: Utility Sector: Wholesale/retail/hotels/rest.
We formally assess people's skills on a regular basis	Sector: Public administration Size: 10-24 Size: 25 plus	Region: Mid Wales Sector: Agriculture/mining/quarrying Sector: Manufacturing/construction Sector: Utility Region: SW Wales Sector: Finance/business services
It is difficult to arrange cover whilst staff are undertaking training	Sector: Wholesale/retail/hotels/restaurants	Region: North Wales Sector: Agriculture/mining/quarrying Sector: Finance/business services
We tend to work with providers to develop our own training programmes		Sector: Agriculture/mining/quarrying Sector: Finance/business services Region: SW Wales

Table 56: Agreement with statements related to the planning of training by region, sector and size of establishment

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
We actively seek advice or information that is relevant to our industry/profession														
Strongly agree	42	43	33	45	40	33	37	35	36	38	59	39	47	51
Tend to agree	31	26	35	30	34	33	30	34	32	31	27	30	32	29
Tend to disagree	9	8	12	11	7	11	12	10	9	14	4	10	7	7
Strongly disagree	5	5	8	5	5	9	7	4	8	4	1	6	4	4
We formally assess people's skills on a regular basis														
Strongly agree	42	46	33	45	37	19	35	30	40	36	61	38	54	57
Tend to agree	30	29	38	25	31	31	31	35	31	32	23	30	30	26
Tend to disagree	11	9	14	12	12	18	15	17	9	17	6	12	8	9
Strongly disagree	8	3	6	8	8	6	8	5	6	7	3	7	3	1



Table 56: Agreement with statements related to the planning of training by region, sector and size of establishment (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
It is difficult to arrange cover whilst staff are undertaking training														
Strongly agree	36	31	40	39	33	30	34	37	41	25	38	36	37	32
Tend to agree	22	24	18	20	25	22	19	21	21	24	24	21	25	25
Tend to disagree	15	17	12	15	18	14	17	16	10	22	17	13	20	22
Strongly disagree	14	16	11	14	12	9	12	9	16	17	11	15	10	13
We tend to work with providers to develop our own training programmes														
Strongly agree	22	20	24	25	16	17	21	18	24	17	24	21	24	21
Tend to agree	25	24	25	22	30	27	23	24	20	25	32	22	30	37
Tend to disagree	17	17	16	17	18	19	16	20	16	19	19	17	17	17
Strongly disagree	15	15	15	16	15	12	19	14	17	19	8	17	11	8

5.1.3 Relationship between training/investment and developing the business

A later question in the survey measured levels of agreement or disagreement with a series of further statements about how the investment in training impacted on development of the business. Of these, chart 22 shows that the statement generating greatest agreement was that 'our staff are the most valuable asset of this organisation'. Over four in five agreed strongly (81%), with another one in seven (14%) tending to agree. Three in five strongly agreed that 'we actively encourage staff to keep up to date with developments in our industry/profession' (60%), with another quarter tending to agree (26%).

The majority of respondents also agreed strongly that 'training and development of our staff is crucial to keep us competitive' (56%) and that 'training which leads to qualifications helps increase staff confidence' (51%). Around a quarter agreed with each of these two statements, and one in ten disagreed.

One statement produced a very different reaction though: just a third (32%) agreed in any way that 'some of our staff do not see themselves as training material and there is not much we can do about it'. Over a third disagreed strongly (35%), whilst a further over two in ten (22%) tended to disagree.

There were also clear differences between sub-groups for each of the particular statements.

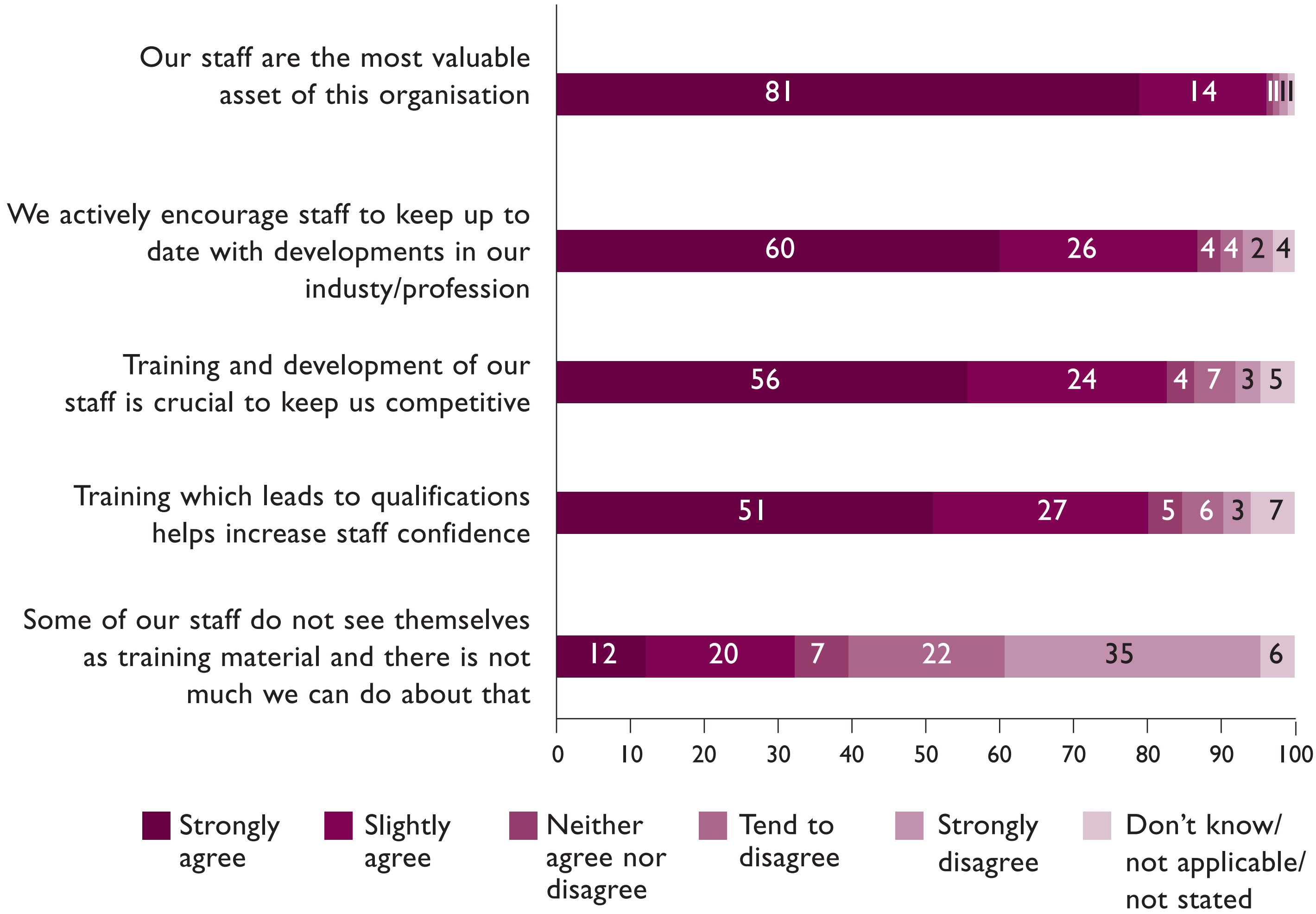
For the statement 'training which leads to qualifications helps increase staff confidence', respondents working in the public sector were clearly more likely to agree with the statement (91%), with two thirds (66%) agreeing strongly. This was also true of establishments with 10 plus employees: the majority (91%) agreed (63% of them agreeing strongly), compared to three quarters (74%) of establishments with up to 9 employees. This is a pattern similarly evident within each sector. Likewise, respondents at head offices of multi-site establishments or subsidiary sites showed higher levels of agreement (61% agreed strongly). Those who provided both on and off-the-job training were also more likely to agree (65%). There were no clear patterns by region or by time established.

Similar patterns were evident for the statement 'we actively encourage staff to keep up to date with developments in our industry/profession'. Once again, those in public administration were more likely to strongly agree (77%), as were respondents at head office of multi-site establishments or subsidiary sites (66% agreed strongly). Establishments with 10 plus employees once more recorded significantly higher levels of agreement (67% agreed strongly). Within sector though, the pattern of recording higher levels of agreement was only evident for wholesale/retail/hotels/restaurants, public administration and those who provided both on and off-the-job training (71%). There were again no clear patterns by region or by time established.

For the statement 'some of our staff do not see themselves as training material and there is not much we can do about it', the familiar patterns were reversed. Those in public administration (21%) or in the public sector (25%) generally were significantly less likely to agree at all. Establishments in South West Wales were slightly more likely to agree (38%). Those in head office of multi-site establishments or subsidiary offices (41%), or who provided both on and off-the-job training (43%) were slightly more likely to disagree strongly. Size of establishment did not reveal any significant differences.

There were very few significant differences between groups for 'our staff are the most valuable asset of this organisation'. Those in public administration were slightly more likely

Chart 22: Attitudes to training



Base: all respondents (unweighted 2,059, weighted 2,059). Single response (level of agreement) to each statement.

than other sectors to agree strongly (89%). This was also true of establishments with over 10 employees (89%). Those who provide both on and off-the-job training were slightly more likely to agree strongly than those who provided neither (86% compared to 75%).

Only those establishments in the private sector were asked about the final statement – 'training and development of our staff is crucial to keep us competitive'. Consequently the base sizes were not big enough for some differences between sub groups to be significant.

Table 57: Agreement with statements related to training and business development – % strongly agreeing

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Our staff are the most valuable asset of this organisation	81	85	80	80	81	69	82	81	77	82	89	79	89	89
We actively encourage staff to keep up to date with developments in our industry/ profession	60	62	60	59	56	46	43	57	51	70	77	57	66	68
Training and development of our staff is crucial to keep us competitive	56	61	56	54	53	36	42	46	54	65	75	51	71	75



Table 57: Agreement with statements related to training and business development – % strongly agreeing (Continued)

		Region				Sector						Size of establishment (number of employees)		
Base: All respondents	Total	North Wales	Mid Wales	SE Wales	SW Wales	Agriculture/mining /quarrying	Manufacturing/ construction	Utility	Wholesale/retail/ hotels/restaurants	Finance/business services	Public administration	2-9	10-24	25 plus
Unweighted	2,059	489	280	760	441	196	393	253	446	352	419	1,005	583	471
Weighted	2,059	468	291	797	436	63	312	86	729	386	482	1,535	342	182
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Training which leads to qualifications helps increase staff confidence	51	56	48	48	53	36	44	42	47	51	66	47	62	64
Some of our staff do not see themselves as training material and there is not much we can do about that	12	10	11	12	16	22	14	13	15	9	6	12	12	9

Note: Single response question. 'Don't know' and 'Other' not shown.

5.2 Summary

Of the statements tested, agreement was highest with 'our staff get about the right amount of training for their roles' (79%). Those in wholesale/retail/hotels/restaurants sector had the highest level of strong agreement (51%). Those in head offices of multi-site establishments were more likely to disagree with the statement (17% versus 12% or less).

Just over seven in ten (73%) agreed that 'we actively seek advice or information about training that is relevant to our industry/ profession' and that 'we formally assess people's skills on a regular basis' (72%). For both, the mean level of agreement was by far the highest amongst public administration establishments. Disagreement with the first statement was higher for establishments with 2-9 employees (16% versus 11% of less) and single-site establishments (17% versus 12% or less), the private sector (16% versus 9% or less). For the latter, strong agreement was lowest in the agriculture/mining/quarrying sector (19% versus 30% or more).

Two thirds agreed that 'time pressures make it difficult to accommodate training for staff' (66%); strong agreement was highest for those with fewer than 25 employees. 58% agreed that 'it is difficult to arrange cover whilst staff are undertaking training', and agreement was lower among the public sector (37% disagreed versus 27% in the private sector) and subsidiary offices of multi-site establishments (36% disagreed versus 27% in other establishment types).

Just under half of respondents agreed that 'we tend to work with providers to develop our own training programmes' (47%) and that 'not much changes in our organisation so apart from training new staff there is not much need for training' (47%). In the case of the former statement, agreement was highest amongst establishments in the public administration sector (56% versus 44% or less), those with 10 plus employees (54% with 10-24, 58% with 25 plus compared to 43% of establishments with 2-9 employees), and those providing both on and off-the-job training (53% versus 45% or less of those providing just one training type). For the statement 'not much changes in our organisation so apart from training new staff there is not much need for training', those in public administration were the least likely to agree (21% versus 38% or more in other sectors).

Exactly two in five (40%) agreed that 'most of our training budget is spent on mandatory training', with agreement slightly higher for those that provided only on-the-job training (47% versus 38% of those that provided only off-the-job training and 42% of those that provided both). Predictably, 'training is not one of our priorities' was the one statement for which disagreement exceeded agreement (66% compared to 27%). Strong disagreement was highest for public administration establishments (68% versus 43% or less), establishments with 25 plus employees (67% versus 60% or less) and those who provide both on and off-the-job training (63% versus 40% or less of those that provided just one training type).

Of the second set of attitude statements in the survey, agreement was highest for 'our staff are the most valuable asset of this organisation' (81%). This was slightly higher among those providing public administration (89% versus 82% or less) or with over 10 employees (89% versus 79% for those with 2-9 employees), as well as those who provide both on and off-the-job training (86% versus 80% or less for those establishments that provided just one type of training.

Three in five strongly agreed that 'we actively encourage staff to keep up to date with developments in our industry/profession' (60%). Those in public administration,



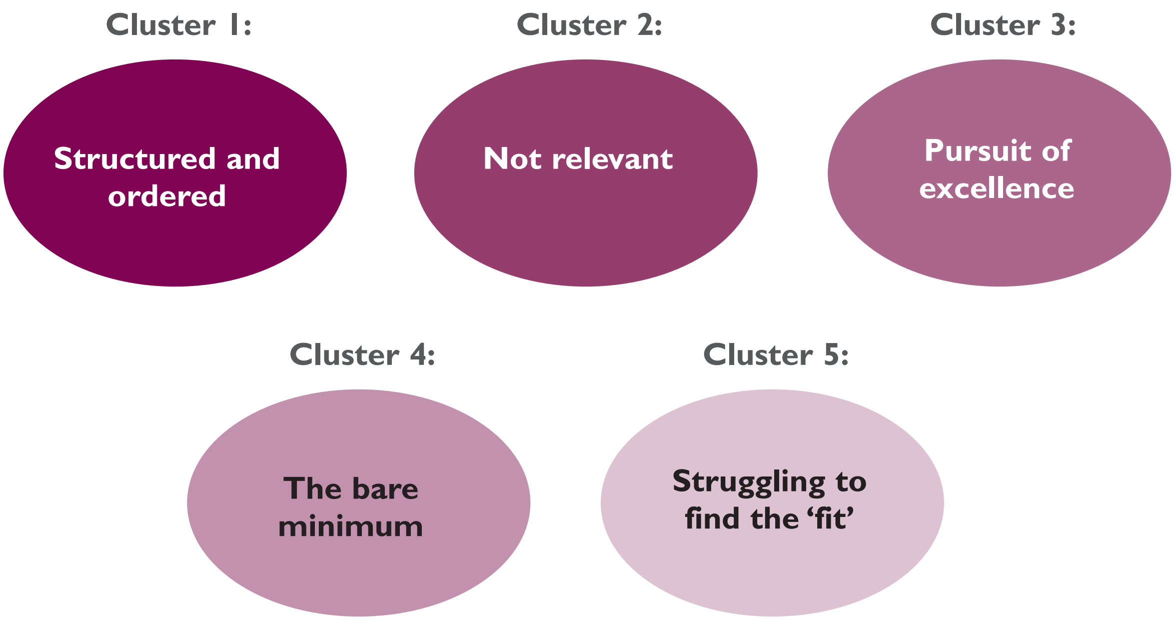
establishments with 10 plus employees, those at head or subsidiary offices of multi-site establishments or who provide both on and off-the-job training were the most likely to give this answer.

A majority agreed strongly that 'training and development of our staff is crucial to keep us competitive' (56%) and that 'training which leads to qualifications helps increase staff confidence' (51%). Both were higher among those in public administration, establishments with 10 plus employees, those at a head or subsidiary office of multi-site establishments or which provide both on and off-the-job training.

Nearly a third (32%) agreed that 'some of our staff do not see themselves as training material and there is not much we can do about it'. Those in public administration or were more likely to strongly disagree with this statement (50% versus 40% or less in other sectors), as were those in head or subsidiary offices of multi-site establishments (at least 40% versus 32% in single site establishments).

5.3 Segmentation of Employers

The information gathered about employer's attitudes to learning has enabled the panel population to be split, or 'segmented' into five clusters as follows:



1 Structured and ordered

This was the largest group in the panel. They had good training arrangements and had not experienced difficulties finding training providers. They provided slightly higher than average on-site and off-site training in the last year, and agreed that training was crucial for the company. However, they were less likely than average to develop their own training programmes, and they had sought less advice than average about it.

2 Not relevant for us

This group had provided the least amount of training in the last year and tended to agree that training was not a priority. They had not necessarily experienced difficulties finding trainers, however, time pressures could make it difficult to accommodate training. They were much less likely to believe that training was crucial for the strength of their company than the other clusters in the sample. With Cluster 4, this group had the highest proportion of establishments with up to 9 employees.

3 Pursuit of excellence

This group had provided the most training in the last year, and had excellent training structures in place. They were the most likely to develop training and had also sought advice from the most sources. They had the largest number of types of training planned for the next year. This group had the highest proportion of establishments with 25 plus employees compared with other clusters. This was the cluster where the highest proportion was classed as public sector (42%).

4 The bare minimum

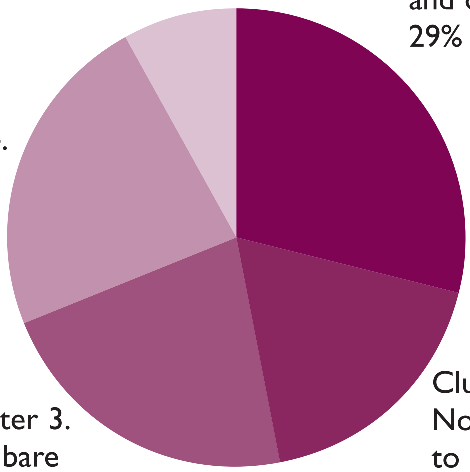
This group had provided lower than average training in the last year and had fewer training programmes planned. Although training was not a priority, they strongly believed that staff got the right amount of training for their roles and that their training budget was spent on mandatory training. They did have training structures in place, but experienced some time pressure and staff cover difficulties whilst accommodating training. They were more likely than average to agree that some staff did not see themselves as training material. Along with Cluster 2 this group contained the highest number of establishments with up to 9 employees. Over half (52%) of this cluster were identified as wholesale/retail/hotels/restaurants.

5 Struggling to find the 'fit'

This was the smallest group in the sample. They had provided higher than average amounts of training in the last year, and had more than average planned for next year. They were the group that had experienced the most difficulties finding an appropriate trainer, and had also experienced more than average difficulties with time pressures and staff cover whilst training. They had sought advice about training from a more than average number of sources. This group had a higher proportion of establishments classed as 'voluntary sector' than other clusters.

The chart below reflects the proportion of establishments in each group. It shows that the size of the clusters was fairly evenly spread with 'Cluster 1: Structured and ordered' being the largest and 'Cluster 5: Struggling to find the fit' being the smallest.

Chart 23: Cluster Breakdown



Base: All whose number of employees at this location has decreased (unweighted 222, weighted 205). Single response question.

Cluster 1: Structured and ordered

Establishment Profile: Establishments in this group were generally medium sized with an average of 15.07 employees. They were part of a multiple site organisation but were not the head office (39%). On the whole this group was made up of private sector establishments (74%) – however it also encompassed a significant number of public sector establishments (17%). The majority were consumer-focused establishments which were particularly likely to employ staff in sales/customer service occupations (29%).

Provision of training: The majority of these establishments provided on the job (86%) and off-the-job (74%) training for their employees. These establishments had not experienced any difficulty in finding an appropriate trainer to meet their needs in the last year.

This group tended to have a positive attitude towards training. The majority:

- Formally assessed people's skills on a regular basis (76%)
- Actively sought advice or information about training that is relevant (72%)
- Agreed that 'our staff get about the right amount of training for their roles' (78%)
- Disagreed that 'training is not one of our priorities' (85%)

Attitudes to training: This group of establishments had a very positive attitude towards their staff and the provision of training. They recognised that training was important for their business to succeed. The majority agreed that:

- Their staff were the most valuable asset of their organisation (97%)
- Training and development of their staff was crucial to keep competitive (94%)
- They actively encouraged staff to keep up to date with developments in their industry/profession (92%)
- Training which leads to qualifications helped increase staff confidence (84%)

The majority (71%) disagreed that some of their staff did not see themselves as training material and there was not much they could do about that.

Future plans: One in ten (10%) of these establishments reported that they did not plan to provide any training to their employees in the next year. At least four in ten planned to provide other technical/practical skills (50%), team working skills (46%), customer handling skills (45%) and communication skills (44%).

Cluster 2: Not relevant to us

Establishment profile: This cluster was made up of smaller establishments with an average of 6.54 employees. The establishments were predominantly single site (83%) and private sector (88%). They were likely to be fairly static in terms of growth, and more likely (39%) than most other groups (excluding those in the Bare minimum cluster, at 34%) to have stayed roughly the same in terms of turnover/financial budget and number of employees.

In terms of types of employees these establishments were more likely than those in the Structured and ordered, Not relevant to us, and Struggling to find the 'fit' clusters to be comprised of managers and senior managers (27%) and skilled trade occupations (13%). They were also more likely (12%) than those in clusters Structured and ordered (10%), The bare minimum (8%) or Struggling to find the 'fit' (9%) to have administrative/secretarial occupations.

Provision of training: In this type of establishment training did not appear to be taken seriously with the majority of employees not receiving any training in the last year (on-the-job, 68% and off-the-job, 80%). Of the small number of establishments in the group who did provide training, more than four in ten (42%) indicated that they do not spend any of their turnover on training and more than half (52%) were spending the same on training per employee as they did three years ago. The vast majority (84%) who had provided training had not received any financial support for any types that they had delivered in the last year.

This group of establishments tended to be very apathetic towards training, with a significant number replying either 'don't know' or 'not applicable' when asked about their attitudes to training. For example:

- Three in ten responded 'don't know' or 'not applicable' to the statement 'most our training budget is spent on mandatory training' (28%)
- Three quarters agreed that 'not much changes in our establishment so apart from training new staff there is not a need for training' (74%)
- Two thirds agreed that 'training is not one of our priorities' (67%)

They were the least proactive in terms of developing their own training programmes (46% disagreed with the statement 'we tend to work with providers to develop our own training programmes') or seeking advice (45% disagreed with the statement 'we actively seek advice or information about training that is relevant to our industry or profession).

This group of establishments (43%) were the most likely to report that they had not used any of the suggested sources of help and advice on how to access training for their staff. They are also the most likely to report that they have not had any contact with any of the training providers in their area (41%).

Attitudes to training: The establishments in this cluster did not see the relevance of training to their business. They were the most likely to disagree that:

- They actively encouraged staff to keep up to date with developments (25%)
- Training and development of their staff was crucial to keep them competitive (40%)
- Training which leads to qualifications helped increase staff confidence (33%)

Although they did see their staff as important they were less likely than all the other clusters to strongly agree that their staff were the most valuable asset of the establishment (64%). They were also more likely to report that their staff did not see themselves as training material



and there was not much they could do about that (40%).

Future plans: These establishments were also the most likely (40%) to report that they were not planning on providing any training in the next year.

Cluster 3: Pursuit of excellence

Establishment profile: This group tended to be made up of larger establishments with an average of 26.28 employees. The establishments tended to be one of a multiple of sites (44%) and whilst the cluster predominantly contained private sector establishments (63%) it also contained a high proportion of public sector establishments (27%). They were more likely than the rest to produce goods and/or services for other parts of the establishment to which they belonged (21%). They were more likely (38%) than those in Structured and ordered (28%), Not relevant to us (15%) and The bare minimum (11%) to have increased the number of employees in the last year.

Provision of learning: This cluster took training more seriously than all the other clusters, with the vast majority of employees receiving either on-the-job training (91%) and/or off-the-job training (84%).
These establishments tended to be focused on the way forward, with objectives set in order to achieve future aims and goals.

This group was more likely than clusters Structured and ordered, Not relevant to us or The bare minimum to want to:

- Address skills levels of workforce (88%)
- Introduce new working practices (79%)
- Introduce new technology in the next year (67%)
- Source additional funding sources (54%)
- Reduce staff turnover (48%)

This group was the least likely to have not encountered difficulties finding an appropriate training provider to meet their needs (96%). They were also the second most likely (after Struggling to find the fit) to be investing more per employee in training than they were 3 years ago (51%). Similarly they were the second most likely (after Struggling to find the fit) to have received financial support (41%).

These establishments tended to be dynamic and to work in a changing environment. They took an active role in the development of their staff and organisation of appropriate training; the following list details that proportions that responded positively to key statements about training:

- Development of staff was a priority (80%)
- Not much changed in their establishment so apart from training new staff there was not much need for training (75% disagreed)
- They worked with providers to devise a training programme (79% agree)
- They actively sought advice or information that was relevant to them (93% agree)
- They formally assessed their staff's skills on a regular basis (69% strongly agree)

These establishments were the most likely to have had contact with the training providers in their local area. For example they had:

- Sent staff on training courses at the provider (61%)
- Provided feedback on training/course content (60%)
- Received visits from representatives (63%)
- Arranged placements in their establishments for students from local colleges (56%)
- Sat on the Board of a local college (15%)

Attitudes to learning: This group had a very positive attitude towards training. They understood that by encouraging and training their staff that their business would grow as a consequence. This cluster along with Struggling to find the 'fit' were the most likely to strongly agree with the following statements:

- Our staff are the most valuable asset of this organisation (92%)
- Training and development of our staff is crucial to keep us competitive (86%)
- We actively encourage staff to keep up to date with developments in our industry/profession (85%)
- Training which leads to qualifications helps increase staff confidence (78%)

Future plans: Overall this type of establishment was planning on providing an extensive range of training for their employees in the coming year; in fact they were planning more training than any other cluster.

Cluster 4: The bare minimum

Establishment profile: These establishments tended to be smaller than average, with on average 7.45 employees. They were predominantly private sector (88%) and single site establishments (77%). Their main business activity was described as producing goods/providing services for consumers (85%). Within this group there was an even split between the number of establishments who had increased their turnover/financial budget (35%) and those who had remained roughly the same (74%) for the majority.

Provision of learning: This cluster was the second most likely to not provide either on-the-job training (57%) or off-the-job training (76%). They had not experienced any difficulties in terms of finding an appropriate provider to meet their needs, with around a fifth (22%) reporting they had not experienced difficulty because they had not planned any training in the past year.

This cluster was more likely than all the other clusters except those in Not relevant to us to indicate that they spend about the same per employee on training than they did 3 years ago (48%). Again, along with the cluster Not relevant to us, these establishments were the most likely to have not received any financial support for any of the training they had delivered (79%).

This group provided training to their staff but they did not view it as essential. They worked with providers but they mainly provided mandatory training. For example the following details the proportion agreeing with key statements about training activity:

Our staff get about the right amount of training for their roles (88%)

- Not much changes in our organisation so apart from training new staff there is not much need for training (76%)
- We formally assess people's skills on a regular basis (76%)
- Training is not one of our priorities (48%)
- We tend to work with providers to develop our own training programmes (58%)
- We actively seek advice or information about training that is relevant to us (79%)
- Most of our training budget is spent on mandatory training (57%)

This cluster and Struggling to find the 'fit' were the most likely to strongly agree that they had encountered difficulties arranging cover whilst staff were undertaking training (50% and 58% respectively).

Attitudes to learning: Overall, in line with all the other clusters the majority of establishments in this cluster strongly agreed that their staff were the most valuable asset of their organisation (82%). However they were the most likely to indicate that some of their staff did not see themselves as training material and there was not much they could do about that (52%).



Future plans: A wide range of training was planned in the next year for the majority of companies. However, this group of establishments was the second most likely (after Not relevant to us) to indicate that they did not intend to provide their employees with any training in the next year (29%).

Cluster 5: Struggling to find the 'fit'

Establishment profile: This group contained establishments larger than the average (with a mean of 20 employees). Although still a small number, this group contained a higher proportion of charity establishments (12%) than all other groups. A third (34%) of the establishments in this group had turnover/financial budget of between £250K and £5 million. Nearly a half (47%) of the establishments in this group had experienced an increase in their turnover/financial budget over the last year.

Provision of learning and advice: This group had provided both on-the-job (80%) and off-the-job (76%) training for their staff. In terms of objectives they had set, this group was similar to the In pursuit of excellence cluster. They wished to:

- Address the skills levels of their workforce (83%)
- Introduce new working practices (72%)
- Secure additional funding (59%)
- Reduce staff turnover (47%)

This group have struggled the most over the last year in terms of finding an appropriate training provider to meet their needs (100%). They were, however, the most likely to have received financial support for training that they had delivered in the last year (46%). Similarly, they were the most likely to report that they have increased the amount they invest per employee on training (56%).

This cluster had had the following types of contact with training providers in their local area:

- Received information in the post/ via phone (80%)
- Sent staff on training courses at the provider (53%)
- Attended networking events arranged by the provider (45%)
- Provided feedback on training/course content (49%)
- Arranged placements in the organisation for students from local colleges (43%)
- Received visits from representatives (41%)

This group was very conscious of the importance of training. They were positive about the benefits that it could bring them and were attempting to provide training to staff. However, they were the most likely to feel that their staff did not get the right amount of training for their roles (30%). They were also the second most likely to disagree that training was not one of their priorities (89%).

This group agreed that they:

- Formally assessed people's skill levels on a regular basis (79%)
- Actively sought advice or information about training that was relevant to them (90%)
- Tended to work with providers to develop their own training programme (54%)

They disagreed that:

- Not much changed in their organisation so apart from training new staff there was not much else required (66%)
- Most of the budget was spent on mandatory training (49%)
- Training was not one of their priorities (89%)

However, overall this cluster was the most likely to experience difficultly in providing training because of time pressures (77%) and the difficultly of arranging cover (77%).

Attitudes to learning: This group of establishments had a positive attitude towards learning, and they saw their staff as the most valuable asset of their organisation (92% strongly agreed). This cluster was the second most likely to indicate that they strongly agreed:

- That training and development of their staff was crucial to keep them competitive (79%)
- They actively encouraged staff to keep up to date with developments in their industry/profession (74%)
- Training which leads to qualifications helped increase staff confidence (71%)

Future plans: This group of establishments planned to provide their employees with a wide range of training in the next year.

APPENDIX A: INTERPRETATION OF THE DATA & GLOSSARY OF TERMS



The sample of the Employer Panel survey was weighted at the analysis stage to ensure that they were representative of establishments by sector and number of employees:

Weighting matrix

Industry Sector^	Number of Employees		
	2 to 9 employees	10 to 49 employees	50 plus employees
	%	%	%
Agriculture	2.8	0.1	0.1
Production	5.0	2.2	1.1
Construction	5.9	1.0	0.2
Retail/wholesale/motor trades	20.1	4.7	0.7
Hotels/restaurants/catering	7.8	1.8	0.2
Transport/communications	3.1	0.9	0.3
Financial/business services	15.6	2.6	0.5
Public administration/education/health	14.4	7.2	1.8

Note: ^ industry sectors correspond to the standard breakdown used in the Interdepartmental Business Register, which was the source of the population counts for weighting purposes. The sector crossbreak in the report uses a slightly different sector breakdown.

The accuracy of estimates based on the survey data depends on two things: firstly the sample size; secondly, the actual survey result. For example, based on 2,059 interviews, a finding of 50% has a margin of error of +/- 2.2%. Hence if 50% of respondents in the survey agreed that most of their training was spent on mandatory training the true figure for the population as a whole would be between 47.8% and 52.2%. The margins of error were larger in the middle of the scale (i.e. for results around the 50% mark) and smaller at the top and bottom of the scale. A finding of 10% (or a finding of 90%) had a margin of error of +/- 1.3. Therefore if 90% of respondents agreed that most of their training was spent on mandatory training, the true finding in the population was between 88.7% and 91.3%.It is not advisable to analyse subgroups containing fewer than 100 respondents. This is because the margin of error on an unweighted sample containing fewer than 100 was +/- 10% or more, which would be generally too large to use as a reliable estimate for establishments in that subgroup.

GLOSSARY OF TERMS

Cluster – as part of a Segmentation analysis, we seek to find groupings of respondents who exhibit similar patterns in terms of the variables measured. The decision as to which variables to use and how many, will affect the results of the clustering. The principle of good clustering is that the clusters should have large distances between them, but that the members of each cluster should be close together. In the case of the Individuals Panel, the segmentation is based around the individual's attitude to learning and development.

Segmentation – a statistical means of understanding a population by examining the attitudinal differences between groups within that population. This technique is commonly used for targeting marketing messages.

Weighting – weighted/ unweighted
The tables in this report show unweighted and weighted bases. The weighted base is the number of interviews weighted to match the profile of Welsh employers. The unweighted base is the actual number of interviews that were carried out with this group of respondents. The percentages quoted in this report are all percentages that have been calculated using the weighted base, so that the data matches the profile of Welsh employers. However, if quoting/showing a base size (for example in a presentation), it is best practice |to quote the unweighted base i.e. the actual number of respondents who answered that question.