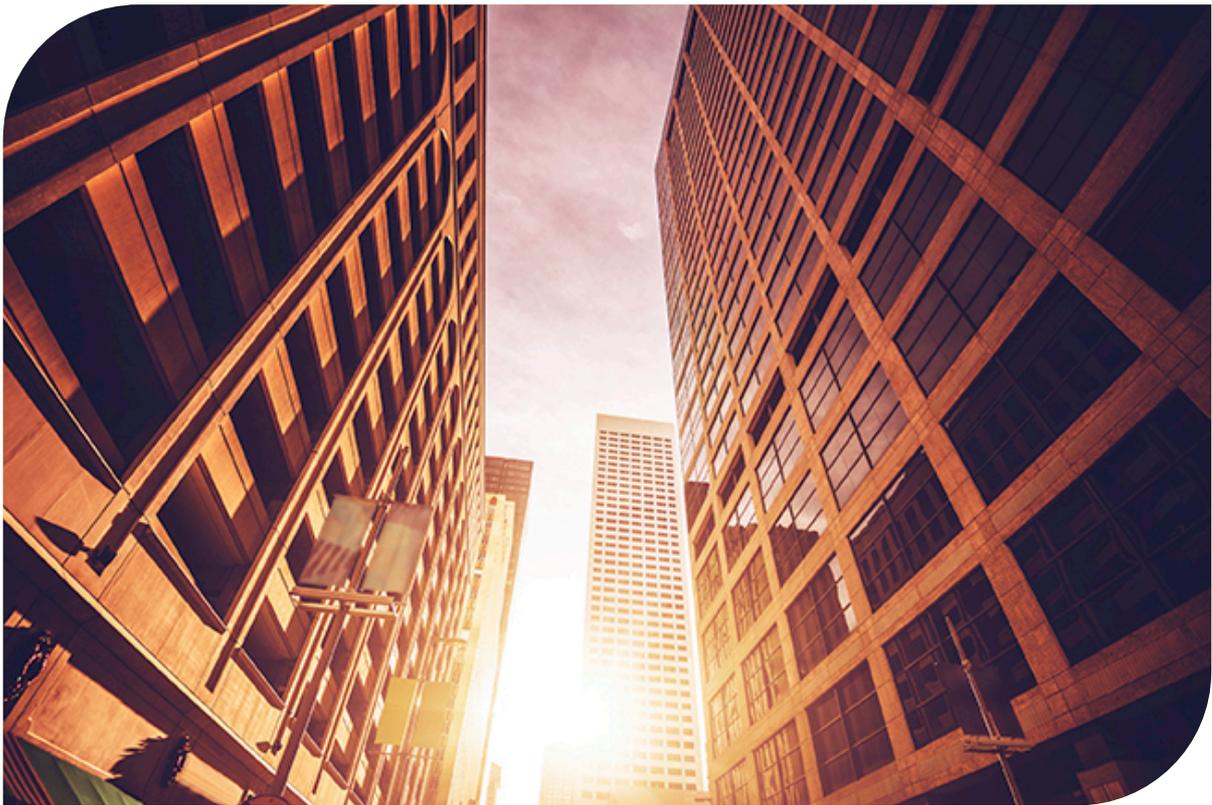


# Employer Attitudes and Motivations regarding Learning and Training, Wave 18

Prepared for **CITB NI**

**September 2018**



## Contents

<b>Management Summary</b>	<b>4</b>
Introduction	4
Methodology	4
Key Business Challenges	4
Turnover Levels	4
Health and Safety	4
Apprentices	5
<b>1 Methodology and Respondent Profile</b>	<b>6</b>
Introduction	6
Methodology	6
Caution in interpretation	7
Size and use of Labour only sub-contracting	7
Client base	7
Project Types	7
Federation Membership	8
Age of business	8
<b>2 Key Business Challenges</b>	<b>9</b>
Introduction	9
Overall trends	9
The impact of Brexit	10
Recruiting suitably skilled staff	11
<b>3 Turnover levels</b>	<b>12</b>
Introduction	12
Recent changes in turnover	12
Expected turnover for the next 12 months	12
<b>4 Health and Safety</b>	<b>14</b>
Introduction	14
Knowledge and awareness of CDM 2015	14
Health and safety co-ordination	15
Principal Designers	16
<b>5 Apprentices</b>	<b>18</b>
Introduction	18
Current patterns of employment of apprentices	18
Reasons for not offering apprenticeships	18
Future plans	18

## Introduction

This report outlines the findings of the 18<sup>th</sup> wave of employer consultation for CITB and CITB NI, the first of which took place in 2005. In addition to providing headline indicators UK-wide, the survey was designed to allow sub-group analysis of employers (e.g. by size and sub-sector), and the identification of regional differences, with the results for Northern Ireland (based on 107 responses) the focus of this report.

As well as providing an overview of the main challenges facing companies in the sector, the report explores topical issues including current and future involvement in apprenticeships, and awareness and knowledge of legislative changes to health and safety practices.

# Management Summary

## Introduction

This report presents the findings of the 18<sup>th</sup> wave of research into the views of businesses operating in Construction and in Professional Services, carried out for CITB and CITB Northern Ireland (CITB NI), the latest in a series dating back to 2005.

## Methodology

Wave 18 consisted of 1,800 structured quantitative telephone interviews with employers and the self-employed, covering the Construction trades sector and the Professional Services sector. Businesses based in Northern Ireland accounted for 107 of these responses and the results detail in this report are based on this subgroup. The fieldwork for the quantitative element was carried out in May and June 2018.

## Key Business Challenges

The most common challenge faced by employers in Northern Ireland is finding suitably skilled staff (38% mention this spontaneously), followed by a need to increase sales (16%) and clients being slow to pay (14%). The proportion of employers reporting difficulties finding suitable staff has increased significantly from 20% in 2017.

When all types of demand side challenges and supply side challenges reported are considered, equal proportions of businesses mentioned challenges of each type (39%). Compared with 2017, results suggest an increase in supply side challenges (up from 28% in 2017).

## Turnover Levels

Half of employers (50%) reported that their turnover had stayed the same over the last year, similar to 2017 (47%) and to the 2018 figure across GB (46%). Although more have experienced an increase in turnover (31%) than a decrease (18%) over the last 12 months, results suggest a slight 'tightening', with the net the balance of those reporting an increase over a decrease lower in 2018 than found in 2017 or 2016.

Firms remain optimistic in terms of expected turnover in the next 12 months. Two-fifths (40%) expect their turnover to increase, compared with 13% expecting a decrease (although only 2% expected it to decrease significantly). Results are very similar to those found in 2016 and 2017.

## Health and Safety

Employers were asked about the CDM regulations that came into force in April 2015. Most businesses (73%) had at least some knowledge of CDM 2015, with 28% reporting having 'good knowledge' and 37% 'reasonable knowledge'. Many more Professional Services companies felt they had good or reasonable knowledge (100%) than Construction companies (68%). Levels of knowledge of CDM 2015 were very similar in Northern Ireland to that found UK-wide.

Almost half (46%) of the businesses surveyed had changed how they co-ordinate their health and safety procedures since the introduction of CDM 2015 (comparable with the 48% found UK-wide).

Firms in Northern Ireland were more positive about the changes brought about by CDM 2015 than firms in the rest of the UK: 46% believed health and safety co-ordination was better under CDM 2015 than CDM 2007 (compared with 29% of firms in GB), while just 1% thought it was worse.

Compliance with CDM 2015 has a cost and time implication for firms. In comparison with CDM 2007, the new regulations are taking more time for a third of businesses (33%) and less time for just 8%. Similarly the requirements of CDM 2015 have led to increased project costs for 42% of businesses - less than 1% said project costs had decreased. The findings were in line with the UK-wide figures regarding impacts on project costs.

Despite this, the overall impact of CDM 2015 is seen as broadly positive. Over half (55%) of businesses who knew something about CDM 2015 were positive about its overall impact. This sentiment was stronger in Northern Ireland than in Great Britain, where fewer businesses consider the impact positive (39%). Two in five businesses (41%) consider the impact of the legislation to be negligible, and just 2% thought its impact had been negative.

## Apprentices

One third (33%) of firms in Northern Ireland offer apprenticeships, and 17% were employing apprentices at the time of the survey. These figures are almost identical to the proportions found across GB, at 34% and 17% respectively). The likelihood of employing any apprentices increases with the size of the firm (from 12% among those with 2-9 direct employees, to 42% where 10-99 staff are employed and to 62% among those with 100+ staff), and is higher among Construction firms (18%) than those operating in Professional Services (9%). The proportion of Construction firms employing apprentices (18%) has not changed significantly in recent years (20% in 2016 and 13% in 2017).

Amongst firms which do not offer apprenticeships, the most commonly cited reason were that apprenticeships are not available in the business's line of work (30%) and that they have not been recruiting at any level (20%). The former suggests there is potential to increase uptake of apprenticeships with a greater range of appropriate construction-related apprenticeships.

A quarter (26%) of firms in Northern Ireland were at least quite likely to take on an apprentice in the next 12 months, around half of whom (14%) felt this was definite or very likely. The proportion of employers expecting to take on any apprentices in the next 12 months is a little higher compared with 2017, when 19% thought it at least quite likely, of whom 6% thought it definite or very likely.

# 1 Methodology and Respondent Profile

## Introduction

- 1.1 This document reports on the 18<sup>th</sup> wave of employer consultation carried out for CITB and CITB Northern Ireland (CITB NI), the latest in a series dating back to 2005.
- 1.2 Wave 18 consisted of 107 structured quantitative interviews with employers (103) and the self-employed (4) across Northern Ireland operating in the Construction trades sector (82) and the Professional Services sector (25).
- 1.3 The sample for the first wave of the survey was drawn from a number of sources: CITB NI's databases of levy and non-levy payers, supplemented by Experian's employer database, specifically for the Professional Services sector and to extend coverage of the self-employed. Much of the sample for Wave 18 came from those agreeing at previous waves to take part in further research, supplemented this year with fresh sample from Market Location.

## Methodology

- 1.4 For the quantitative phase, at a UK-wide level, quotas for telephone interviews were set by sector, geography, and employer size (based on the number of staff employed directly in the UK). Results for this element were then weighted to ensure that on these variables survey results were representative, using ONS 2017 Business Population Estimate data.
- 1.5 Where comparable data exists, results in this report are compared with results from earlier waves. These adopted almost the same methodologies, other than the fact two waves were Construction sector only and excluded Professional Services firms (waves 9 and 13).
- 1.6 The list below shows the main month of quantitative fieldwork for each wave – for Wave 18, quantitative fieldwork took place from 8th May to 14th June 2018.
  - Wave 1: February 2005
  - Wave 2: September 2005
  - Wave 3: June 2006
  - Wave 4: December 2006
  - Wave 5: August 2007
  - Wave 6: March 2008
  - Wave 7: July 2008
  - Wave 8: March 2009
  - Wave 9: November 2009 (Construction sector only)
  - Wave 10: August 2010
  - Wave 11: August 2011
  - Wave 12: May 2012
  - Wave 13: September 2013 (Construction sector only)
  - Wave 14: September 2014
  - Wave 15: August 2015
  - Wave 16: July 2016
  - Wave 17: May 2017
  - Wave 18: May 2018

## Caution in interpretation

- 1.7 Results presented in this report are based on a relatively small number of interviews (107) and should be treated as indicative. On a base of 107 interviews, sampling error, in the worst-case scenario from a statistical reliability angle of a survey result of 50%, is approximately +/- 9.5, which means that statistically we are 95% confident that the true result lies within the range 40.5% - 59.5% range. In the case of a survey result of 25% or 75% the sampling error falls to +/- 8.2%.
- 1.8 Furthermore, results were not weighted to be representative of each geography individually, hence there is no guarantee that the results presented are fully representative of the sector in Northern Ireland. Hence again some caution is needed with the interpretation of the results.

## Size and use of Labour only sub-contracting

- 1.9 Most firms employed fewer than 10 staff directly (83%), indeed three-fifths employed fewer than 5 staff. Construction firms were asked if they currently employed any staff on a labour-only sub-contract (LOSC) basis, such as the self-employed or those taken on via an agency. Seven in ten (70%) were doing so (a figure which varied little by size of firm) – this is higher than recent waves, although proportions have fluctuated quite widely each year in Northern Ireland (Wave 17 – 50%; Wave 16 – 66%; Wave 15 - 44%).

## Client base

- 1.10 In line with last year, seven in ten firms worked for the general public (71%; the smaller the company the more likely they were to work for the public), while around half work as a sub-contractor for other firms (52%), for other commercial clients (57%) or for government or public-sector clients (50%). The pattern is similar to that found across the UK as a whole.
- 1.11 The general public and working for other lead contractors were the most frequently cited *main* client type (by 38% and 34% respectively), followed by working for other commercial clients (19%) and for government or public-sector clients (9%, though this was mentioned by just over half of those with 100+ staff – note a relatively low base of 13 survey respondents). Firms in Northern Ireland were more likely to say their main client type was working as a sub-contractor for other construction companies (34%) than those in Great Britain (24%).

## Project Types

- 1.12 Companies were asked about the project types they worked on (those accounting for more than about 10% of their turnover). Three-quarters (77%) carry out a significant amount of housing projects (84% of those with 2-9 staff do so, falling to 41% among those with 10-99 staff and 30% among those with 100+ staff), with many working across both new build housing (60%) and housing maintenance, repair and extensions (51%). Many more work on new build housing than said they did so GB-wide (33%).
- 1.13 Half work on offices or commercial property projects (51%), and around a third working on industrial construction (33%) or retail or leisure (34%). Fewer work on infrastructure projects (16%, though a majority (60%) of large firms with 100+ staff do so), and only 6% carry out a significant level of work on historic (pre-1919) buildings (lower than the 24% among GB companies).

## Federation Membership

- 1.14 Over half of companies are members of trade federations, industry bodies or professional institutions (55%), though this is higher among Professional Services firms (74%) and those with 10-99 staff (82%). The overall figure is similar to the GB level of 51%. The most frequently cited organisations were the Construction Employers Federation Northern Ireland (CEFNI), NICEIC (National Inspection Council for Electrical Installation Contracting) and the FMB (Federation of Master Builders).

## Age of business

- 1.15 Most firms were very long established. Three-quarters (78%) had been operating for more than 10 years, indeed almost three-fifths (58%) had been operating more than 20 years.

## 2 Key Business Challenges

### Introduction

2.1 Examining the challenges faced by construction businesses in Northern Ireland is essential in delivering effective policy for the sector. The following section explores what businesses consider to be the key challenges they face.

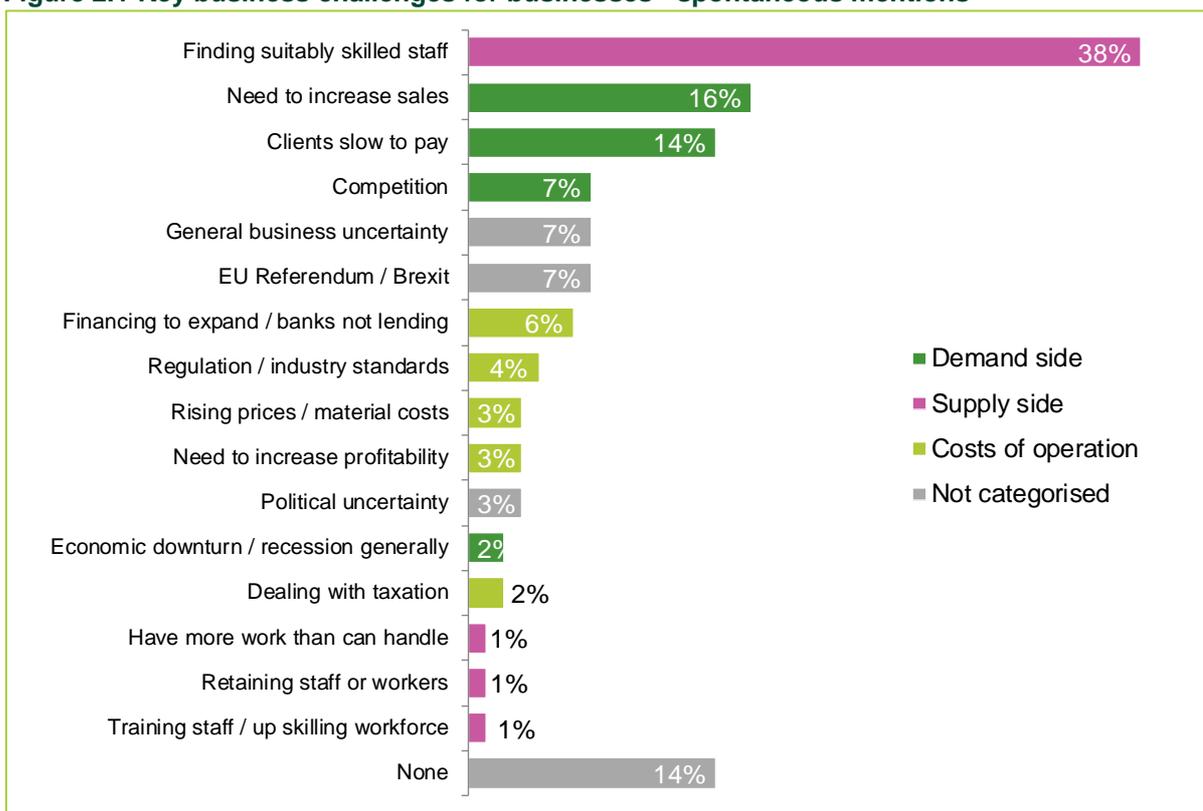
### Overall trends

2.2 Respondents were asked what key challenges their businesses were currently facing. The various challenges identified by employers can be classified into:

- Supply side issues relating to supply of staff or skills;
- Demand side issues relating to a lack of demand for work;
- Costs of operation issues relating to the profitability of their work.

Results for Northern Ireland are presented in Figure 2.1.

**Figure 2.1 Key business challenges for businesses - spontaneous mentions**

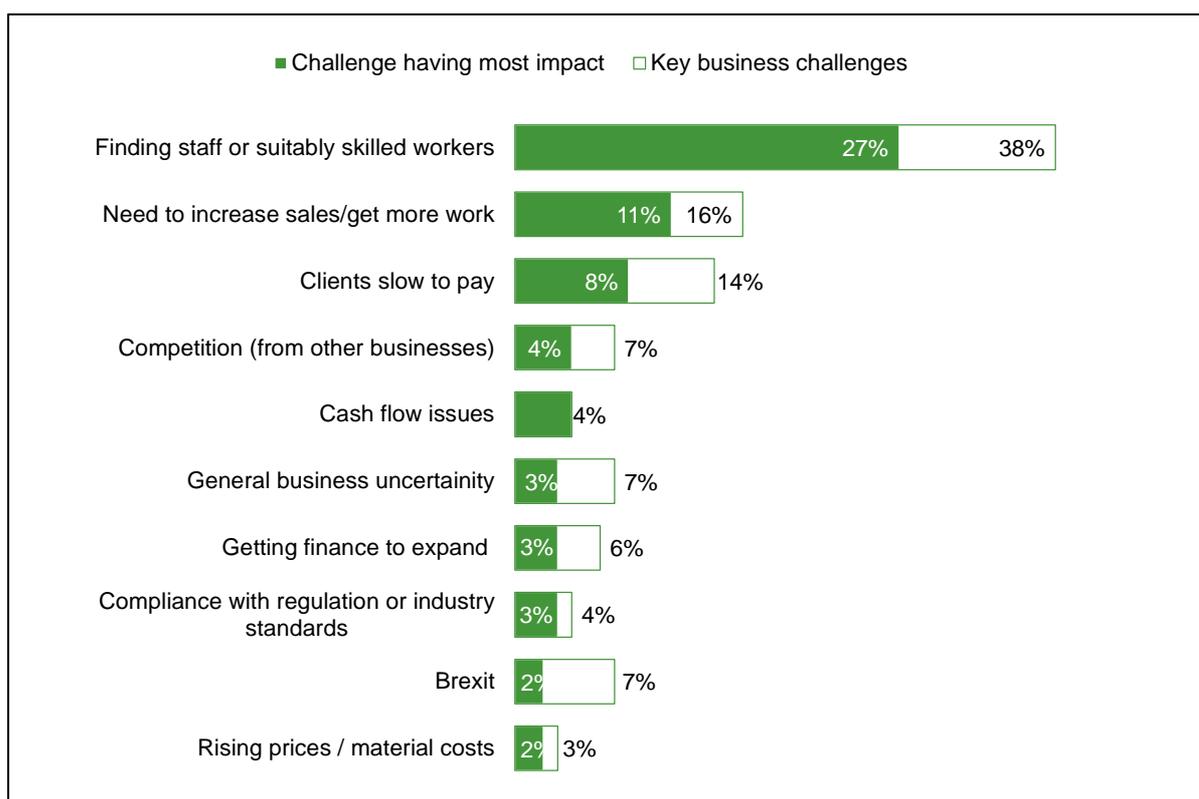


Base: All businesses (107)

2.3 The same proportion of employers are facing demand side as supply side challenges (each 39%). Around one in five (18%) reported at least one concern relating to the costs of operation. The balance of these challenges is very similar to GB as a whole (36%, 34% and 21% respectively).

- 2.4 Compared with 2017, results suggest an increase in supply side challenges (experienced by 39% in 2018, up from 28% in 2017).
- 2.5 The most common specific challenge faced by employers is finding suitably skilled staff, mentioned by 38% of those surveyed. This challenge has become more prominent since the last wave of research in 2017 when only 20% of firms reported it as a key challenge. This suggests a tightening of the labour market. Around one in six firms (16%) reported a need to increase sales as a key business challenge (very similar to the 20% in 2017), with clients being slow to pay the third most common challenge, reported by 14% of businesses (almost identical to the 13% in 2017).
- 2.6 In comparison, fewer were facing challenges from competition from other firms (7%), the consequences of Brexit (7%) and a lack of available finance for expansion (6%). None of these had significantly changed since the previous survey.
- 2.7 Employers were asked which challenge is having the most impact. Difficulties finding staff or suitably skilled workers was the most commonly reported issue (27%) followed by the need to increase sales (11%) and clients being slow to pay (8%). Other issues were reported as having the most impact by a smaller proportion of employers, as shown in Figure 2.2.

**Figure 2.2 Which challenge is having the most impact**



Base: All Businesses (107)

### The impact of Brexit

- 2.8 Fieldwork for 2018 took place approximately two years after the EU referendum. Northern Ireland clearly has a unique position in sharing a border with the EU, and businesses were asked about how the process of leaving the EU would affect them.

- 2.9 Overall, 7% of businesses spontaneously mentioned Brexit as a challenge that they were facing. This was not significantly more than across the UK as a whole (5%). Neither has there been any substantial changes from the 2017 survey in Northern Ireland, when 6% reported Brexit as a key challenge.
- 2.10 However, it is worth noting that 'general business uncertainty' and 'political uncertainty' were mentioned by 7% and 3% of employers respectively, and these responses may express underlying concern about Brexit. Nevertheless, clearly issues relating to skills, sales and payment are much more top of mind than Brexit.

### Recruiting suitably skilled staff

- 2.11 Around four in ten (38%) employers spontaneously reported finding staff as a challenge. This proportion represents a statistically significant increase from 20% in 2017.
- 2.12 All employers who did not spontaneously mention the issue spontaneously were asked whether they find it difficult to find suitably skilled staff. Including both employers who said this spontaneously and when prompted, two-thirds (67%) of NI employers said that they found it difficult to find suitably skilled staff, almost double the proportion that reported this in 2017 (36%).
- 2.13 Firms having difficulties finding suitably skilled staff were asked which occupations these shortages were occurring in. Construction employers in Northern Ireland were most likely to mention a shortage of bricklayers, plasterers or carpenters / joiners (each mentioned by around three in ten of those experiencing skill shortages), followed by plumbers, electricians and painters/decorators (each mentioned by around one in seven of those experiencing skill shortages).
- 2.14 Nearly all businesses experiencing difficulties finding suitably skilled staff felt this was having a negative impact on their business (91%, the same proportion as across the UK as a whole). The most common impacts for businesses in NI were:
- Limiting growth of the business (30% of those experiencing difficulty recruiting suitably skilled staff)
  - Losing business to competitors (27%)
  - Projects over-running (22%) or starting late (17%)
  - Wage inflation or paying a premium (9%).

These results indicate that skill shortages are much more than an inconvenience, and instead often have serious implications for productivity, profitability and business growth.

### 3 Turnover levels

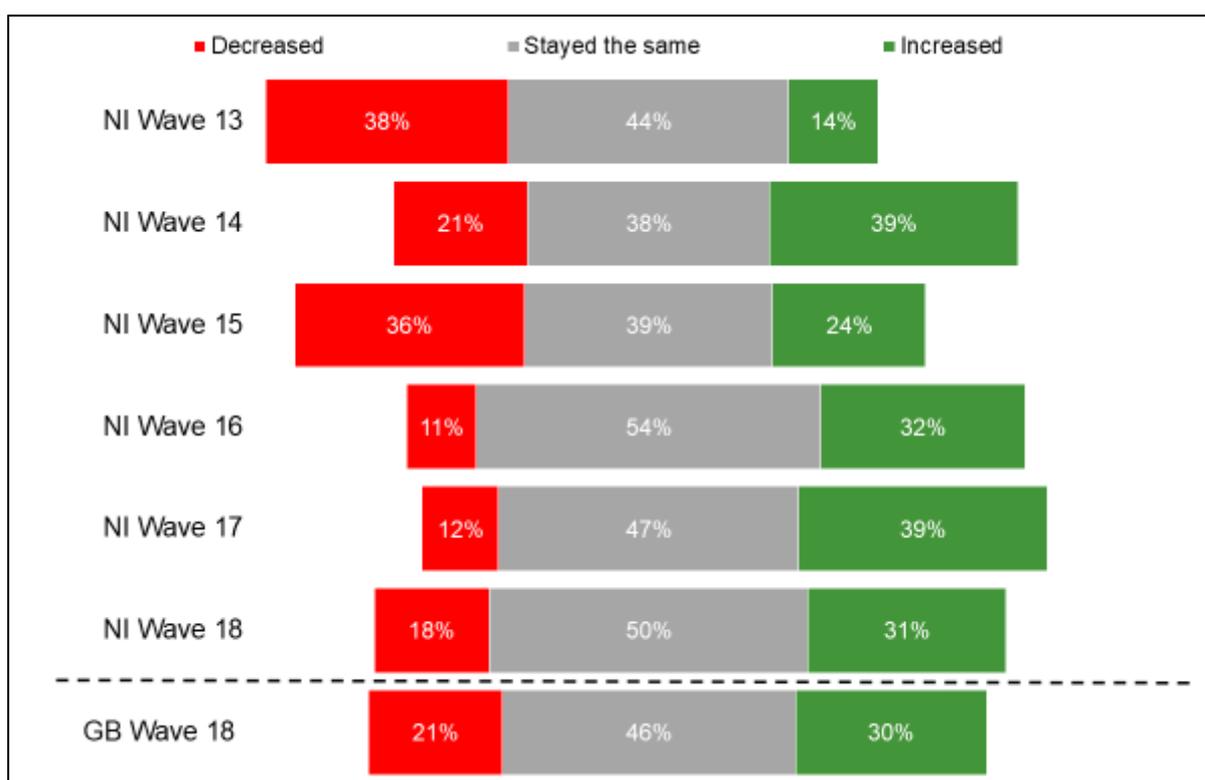
#### Introduction

3.1 This chapter examines the recent turnover of firms and their turnover expectations for the next 12 months. Comparisons are made with previous recent waves of panel research where possible.

#### Recent changes in turnover

3.2 Firms were asked how their turnover in the last 12 months compared with the 12 months before that. Half (50%) reported that their turnover had stayed the same over the last year, similar to 2017 (47%) and the 2018 figure across GB (46%). Although more have experienced an increase in turnover (31%) than a decrease (18%) over the last 12 months, results suggest a slight 'tightening', with the net the balance of those reporting an increase over a decrease lower in 2018 than found in 2017 or 2016.

**Figure 3.1 Change in turnover over the previous 12 months compared with the 12 months before that**

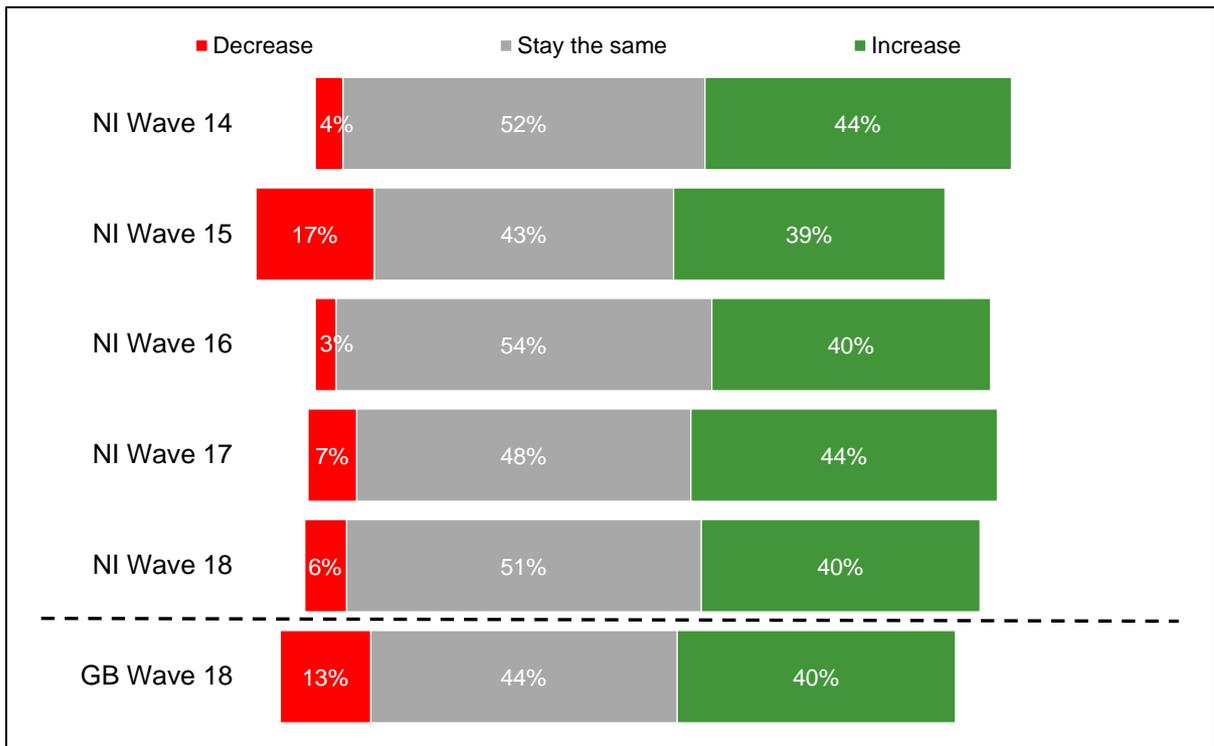


Base: All in operation for longer than 12 months: NI (bases vary: 98 – 108); GB (1,681).

#### Expected turnover for the next 12 months

3.3 Firms were asked whether they expected their turnover to increase, decrease or stay the same over the next 12 months. Overall, the expectations expressed were very similar to 2017, and firms were relatively optimistic. Two-fifths (40%) expected their turnover to increase, similar to the outlook in 2017 (44%) and found across GB in 2018 (40%). Overall 13% expected turnover to decrease (although only 2% expected it to decrease significantly). Half (51%) expected turnover to stay about the same.

Figure 3.2 Turnover expectations for the next 12 months



Base: All businesses: NI (bases vary: 98 – 118); GB (1,693).

3.4 Firms in Northern Ireland were more positive than businesses in GB about turnover in the immediate future, with 13% of firms in Northern Ireland expecting their turnover to increase significantly in the next 12 months, compared with 4% of GB firms. They were also less likely to foresee decreases in turnover (6% vs. 13% of GB firms).

## 4 Health and Safety

### Introduction

4.1 This section explores issues around the CDM Regulations 2015 which came into force in April 2015 and which introduced various new roles and duties in the management of the health and safety in the construction industry. Employers were asked about their awareness and knowledge of the CDM Regulations 2015, how they felt it impacted their business, and what changes they have put in place as a result.

### Knowledge and awareness of CDM 2015

4.2 Most businesses (73%) had at least some knowledge of CDM 2015, on par with the UK-wide average (76%). Just under three in ten (28%) reported they had 'good knowledge' and 37% 'reasonable knowledge'. Many more Professional Services companies felt they had good or reasonable knowledge (100%) than Construction companies (68%).

4.3 Around a quarter had either never heard of CDM 2015 (6%) or recognised the name but did not know any specifics (18%).

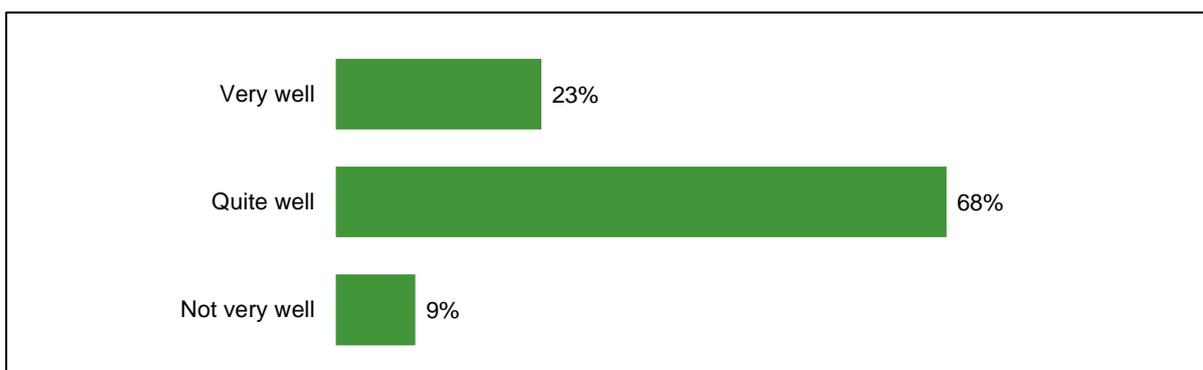
4.4 Levels of knowledge of CDM 2015 were very similar in Northern Ireland to that found UK-wide.

4.5 As part of the introduction of CDM 2015, some changes were made to roles within construction projects. These included:

- Removing the need for a CDM Co-ordinator, with these duties being distributed within the internal project team
- The creation of a new role of Principal Designer
- Requiring a Principal Designer and a Principal Contractor to be explicitly identified and appointed by the client in projects involving more than one contractor.

4.6 Among employers aware of CDM, most (68%) had some knowledge of these specific changes to project roles, and, as shown below, the majority of this group (91%) believed they had a good understanding of what the role changes involved.

**Figure 4.1 Extent to which businesses understand CDM 2015 changes to roles within construction projects**

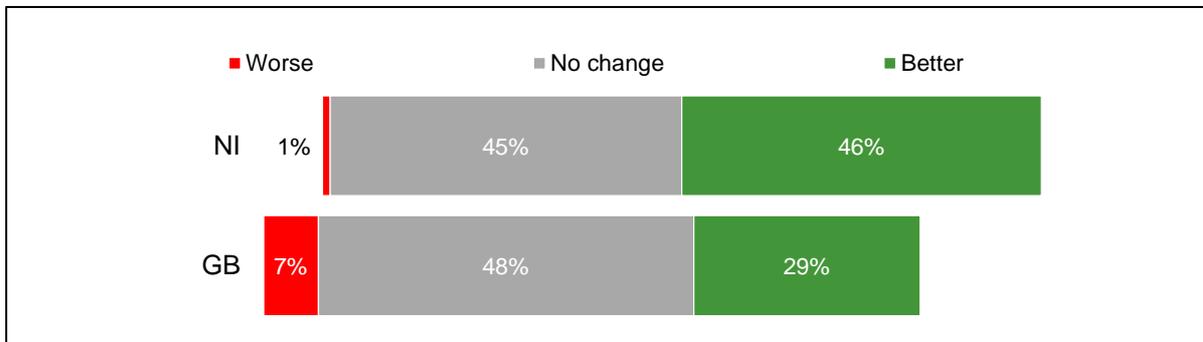


Base: All businesses aware that role changes part of CDM 2015 changes (67)

## Health and safety co-ordination

- 4.7 One of the main changes under CDM 2015 was removing the need for health and safety co-ordination to be done by someone external such as a CDM Co-ordinator. Instead, these duties could be done internally via the Principal Designer and/or the Principal Contractor. Three-fifths (61%) of businesses now manage their health and safety co-ordination internally, either for all projects (38%, rising to four-fifths among firms with 100+ staff) or usually for most projects (23%), very similar to the practices of GB firms. In addition, around one in five (18%) said the internal / external balance was roughly 50/50. This leaves one in six employers saying health and safety coordination was always or usually managed externally.
- 4.8 Almost half (46%) of the businesses surveyed had changed how they co-ordinate their health and safety procedures since the introduction of CDM 2015 (comparable with the 48% found UK-wide). The most common changes were greater awareness of health and safety (47% of employers making changes), more regular updates or training for employees (19%), appointing a Principal Designer for projects (11%) and amending their policies and practices to align with the new regulations (9%).
- 4.9 Businesses were asked for their opinions of how CDM has impacted health and safety co-ordination. As shown below, firms in Northern Ireland were more positive than firms in the rest of the UK: 46% believed co-ordination was better under CDM 2015 than CDM 2007, compared with 29% of firms in GB. A similar proportion (45%) felt that co-ordination was unchanged, leaving just one percent thinking it was worse.

**Figure 4.2 Whether health and safety co-ordination under CDM 2015 is better, worse or no different than under CDM 2007**



Base: All businesses with some knowledge of CDM 2015 (83)

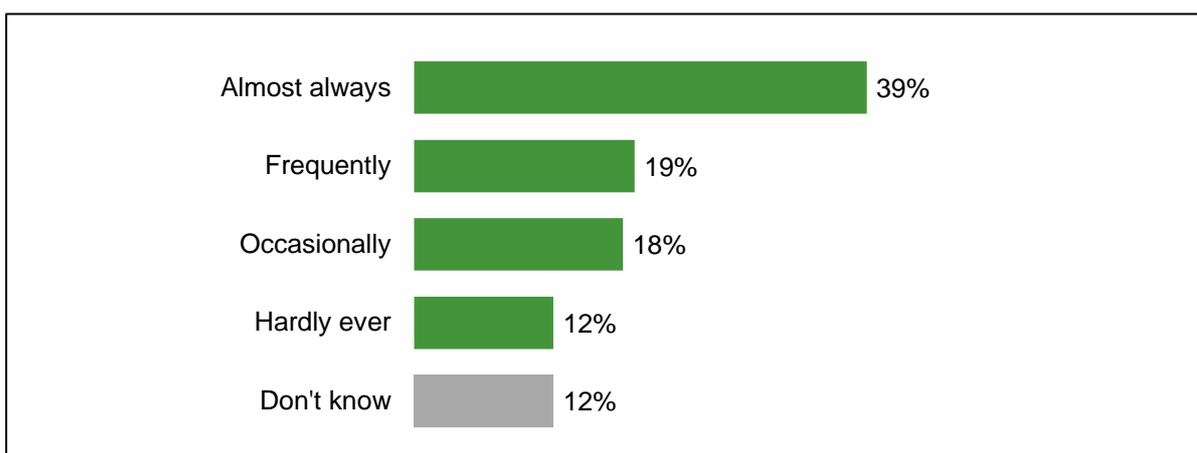
- 4.10 Businesses gave an array of answers for what was better under CDM 2015. Top of the list was increased awareness of health and safety resulting in fewer incidents (24%), followed by making the process easier to manage and simpler for everyone (18%), clarifying roles and responsibilities (13%), and the system moving to be less reactive and more proactive (10%).
- 4.11 Compliance with CDM 2015 has a cost and time implication for firms. In comparison with CDM 2007, the new regulations are taking more time for a third of businesses (33%, including much more for 14%) and less time for 8%. These findings suggest that CDM 2015 regulations are slightly more onerous than the previous iteration for some, though half (50%) of firms have observed no change in how much time compliance takes.

- 4.12 In terms of project costs, the requirements of CDM 2015 have led to increased project costs for 42% of businesses surveyed. Virtually all the other firms reported that costs had not changed (57%); less than one percent said project costs had decreased. The findings were in line with the UK-wide figures regarding impacts on project costs. The cost increases are seen as a result of such aspects as increased time, often in relation to admin and/or record keeping, and also training.
- 4.13 The overall impact of CDM 2015 is seen as broadly positive. Over half (55%) of businesses who knew something about CDM 2015 were positive about its impact. This sentiment was stronger in Northern Ireland than in Great Britain, where fewer businesses consider the impact positive (39%). Two in five businesses (41%) consider the impact of the legislation to be negligible, and just 2% thought the impact had been negative.
- 4.14 Moreover, 86% of businesses in Northern Ireland think that legislation such as CDM 2015 is necessary to ensure health and safety on construction projects, higher than the UK-wider proportion (76%). Only 8% did not consider legislation necessary. The importance of CDM 2015 is clearly widely recognised in both Northern Ireland and Great Britain.

### Principal Designers

- 4.15 Another change brought about with CDM 2015 is that all projects with more than one contractor must have a Principal Designer and Principal Contractor appointed and a health and safety file. Businesses were asked how this had affected their business.
- 4.16 Four in ten (39%) businesses reported that their clients almost always appoint Principal Designers at the outset or concept stage of the project and before design stages start. In addition, a fifth (19%) said they did this frequently. In contrast 12% said clients hardly ever did so.

**Figure 4.3 Frequency of clients appointing Principal Designers at the outset of a project since the introduction of CDM 2015**



Base: All businesses with some knowledge of CDM 2015 (83)

- 4.17 Most businesses reported that Principal Designers get embedded in the appointed project team, at least to some extent. Only 6% of firms reported that this never happens, with 41% saying it happens to some extent and 18% to a large extent. Just over one in five (23%) say Principal Designers are completely embedded in the appointed project team.

## CONIAC and CONIAN

- 4.18 The role of the Construction Industry Advisory Committee (CONIAC) and the Construction Industry Advisory Committee (CONIAN) is to advise the Health and Safety Executive on health and safety within the building, civil engineering and engineering construction industry.
- 4.19 As in GB, awareness of both organisations was low. Just under one in five (18%) of businesses had heard of CONIAC (24% in GB), and 11% were aware of CONIAN (13% in GB).

## 5 Apprentices

### Introduction

- 5.1 This chapter explores issues surrounding current and likely future recruitment of apprentices. Comparisons are made with the previous recent waves of the panel research where possible.

### Current patterns of employment of apprentices

- 5.2 One third (33%) of firms in Northern Ireland offer apprenticeships, and 17% said they employed any at the time of the survey (almost identical to the proportions found across GB, 34% and 17% respectively). The likelihood of employing any apprentices increases with the size of the firm (from 12% among those with 2-9 direct employees, to 42% where 10-99 staff are employed and to 62% among those with 100+ staff), and is higher among Construction firms (18%) than those operating in Professional Services (9%).
- 5.3 The proportion on Construction firms employing apprentices (18%) remains similar to the level found in 2016 (20%) and 2017 (13%).
- 5.4 In terms of recent recruitment of apprentices, around one in eight (13%) Construction firms reported externally recruiting an apprentice in the last 12 months, unchanged from 2017 (14%). Fewer Construction firms (4%) had started an existing employee on an apprenticeship, although this was in line with the previous year (3%). Among Professional Services firms 6% had recruited someone externally to start an apprenticeship in the last 12 months and 2% had started an existing employee on an apprenticeship in that time.
- 5.5 One in nine Construction firms (11%) said they had an apprentice on the payroll of another construction company, rising to around a quarter of those with 100+ staff (27%). Results suggest this is a more prevalent practice than in GB (3%)

### Reasons for not offering apprenticeships

- 5.6 Amongst firms not offering apprenticeships, the most commonly cited reasons were that apprenticeships are not available in their particular line of work (30%) or they had not been recruiting at any level (20%; all of these small firms with fewer than 10 staff). Other less common reasons included a preference for recruiting experienced staff (10%), not seeing the need for any apprentices (10%), difficulties finding suitable applicants (8%) and bad experiences in the past (6%).

### Future plans

- 5.7 A quarter (26%) of firms in Northern Ireland reported that they were at least quite likely to take on an apprentice in the next 12 months, around half of whom (14%) felt this was definite or very likely. Reflecting the pattern of recent engagement with apprenticeships described above, the likelihood of anticipating taking on any apprentices in the next 12 months was higher among Construction firms (16% were definite or very likely, compared with 2% of Professional Services firms) and larger firms (62% of those with 100+ staff said it was definite or very likely).
- 5.8 The proportion of employers in 2018 expecting to take on any apprentices in the next 12 months is a little higher compared with 2017, when 19% thought it at least quite likely, of whom 6% though it definite or very likely.

- 5.9 A quarter of firms (25%) said that they think there are more people wanting to become apprentices than there are positions available. This is much lower the proportion in 2017 (46%), perhaps partly indicative (as just discussed) of anticipated increased demand for apprentices expected over the next 12 months.

“IFF Research illuminates the world for organisations businesses and individuals helping them to make better-informed decisions.”

Our Values:

### 1. Impartiality and independence:

IFF is a research-led organisation which believes in letting the evidence do the talking. We don't undertake projects with a preconception of what “the answer” is, and we don't hide from the truths that research reveals. We are independent, in the research we conduct, of political flavour or dogma. We are open-minded, imaginative and intellectually rigorous.

### 2. Being human first:

Whether employer or employee, client or collaborator, we are all humans first and foremost. Recognising this essential humanity is central to how we conduct our business, and how we lead our lives. We respect and accommodate each individual's way of thinking, working and communicating, mindful of the fact that each has their own story and means of telling it.

### 3. Making a difference:

At IFF, we want to make a difference to the clients we work with, and we work with clients who share our ambition for positive change. We expect all IFF staff to take personal responsibility for everything they do at work, which should always be the best they can deliver.



Chart House  
16 Chart Street  
London N1 6DD  
Tel: +44(0)20 7250 3035  
Website: [iffresearch.com](http://iffresearch.com)

Contact details: Mark Winterbotham and Sam Morris  
[mark.winterbotham@iffresearch.com](mailto:mark.winterbotham@iffresearch.com)  
[sam.morris@iffresearch.com](mailto:sam.morris@iffresearch.com)