Employer Perspectives Survey 2016

Scotland Slide Pack
Introduction

- This is the fourth survey in this biennial series
- A number of changes were made to the questionnaire to reflect changing policy requirements.
- The study focused on the following areas:
  - How to support the pipeline of talent into business
  - Employers’ approaches to recruitment
  - What employers look for in applicants and recruitment of education leavers
  - Employer engagement with work experience
  - Staff development and employers’ decisions on this
  - Skills initiatives and vocational qualifications
  - Employer engagement with and attitudes towards apprenticeships

Employer Perspectives Survey 2016

- Covers all business sectors of the economy
- Scotland: 4,009 interviews
- 22 minute telephone interviews
- With person responsible for training and HR issues
- Sites with 2+ employees were eligible
- Fieldwork carried out between May and August 2016

Questionnaire Coverage

- Scotland: 4,009 interviews
- Fieldwork carried out between May and August 2016
- Covers all business sectors of the economy

Produced by IFF Research
## Achieved interviews and confidence intervals

<table>
<thead>
<tr>
<th>Population</th>
<th>Number of interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>150,876</td>
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</table>

### By size of establishment

<table>
<thead>
<tr>
<th>Size</th>
<th>Population</th>
<th>Number of interviews</th>
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</thead>
<tbody>
<tr>
<td>2-4</td>
<td>75,002</td>
<td>1,004</td>
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<tr>
<td>5-9</td>
<td>35,123</td>
<td>983</td>
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<tr>
<td>10-24</td>
<td>24,665</td>
<td>905</td>
</tr>
<tr>
<td>25-49</td>
<td>8,575</td>
<td>519</td>
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<tr>
<td>50-99</td>
<td>4,184</td>
<td>289</td>
</tr>
<tr>
<td>100+</td>
<td>3,327</td>
<td>309</td>
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### By sector

<table>
<thead>
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<th>Sector</th>
<th>Population</th>
<th>Number of interviews</th>
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<tr>
<td>Primary Sector &amp; Utilities</td>
<td>13,297</td>
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<tr>
<td>Manufacturing</td>
<td>7,000</td>
<td>187</td>
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<tr>
<td>Construction</td>
<td>12,882</td>
<td>252</td>
</tr>
<tr>
<td>Wholesale &amp; Retail</td>
<td>29,634</td>
<td>847</td>
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<tr>
<td>Hotels &amp; Restaurants</td>
<td>15,477</td>
<td>448</td>
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<tr>
<td>Transport &amp; Comms</td>
<td>8,835</td>
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<td>Financial Services</td>
<td>2,871</td>
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<td>Business Services</td>
<td>29,665</td>
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<tr>
<td>Public Admin.</td>
<td>2,416</td>
<td>109</td>
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<td>Education</td>
<td>4,738</td>
<td>172</td>
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<tr>
<td>Health &amp; Social Work</td>
<td>11,260</td>
<td>463</td>
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<tr>
<td>Arts &amp; Other Services</td>
<td>12,801</td>
<td>281</td>
</tr>
</tbody>
</table>

All the figures presented in this slide pack are subject to a margin of error; 2 percentage points at the overall level and typically between 2 and 6 percentage points across the establishment size and sector sub-groups.
Survey population: size

% of all establishments

- 2 to 4 employees: 16%
- 5 to 9 employees: 23%
- 10 to 24 employees: 6%
- 25 to 49 employees: 3%
- 50 to 99 employees: 2%
- 100+ employees: 2%

% of all employment

- 2 to 4 employees: 43%
- 5 to 9 employees: 15%
- 10 to 24 employees: 12%
- 25 to 49 employees: 12%
- 50 to 99 employees: 10%
- 100+ employees: 8%

Source: ONS Inter-Departmental Business Register (IDBR), March 2015
Survey population: sector

Source: ONS Inter-Departmental Business Register (IDBR), March 2015
# Employer attitudes

## Staff happiness is as important as organisational performance
- **10%** Disagree strongly
- **27%** Disagree slightly
- **58%** Neither agree nor disagree
- **10%** Agree slightly
- **10%** Agree strongly

**86%** AGREE

## Staff ability to do job is more important than formal qualifications
- **11%** Disagree strongly
- **25%** Disagree slightly
- **58%** Neither agree nor disagree
- **9%** Agree slightly
- **5%** Agree strongly

**82%** AGREE

## Happy to pay towards training and development
- **6%** Disagree strongly
- **6%** Disagree slightly
- **20%** Neither agree nor disagree
- **24%** Agree slightly
- **42%** Agree strongly

**66%** AGREE

## Always looking for new opportunities
- **8%** Disagree strongly
- **11%** Disagree slightly
- **24%** Neither agree nor disagree
- **22%** Agree slightly
- **33%** Agree strongly

**55%** AGREE

## Investing in management skills is a top priority
- **9%** Disagree strongly
- **12%** Disagree slightly
- **26%** Neither agree nor disagree
- **24%** Agree slightly
- **28%** Agree strongly

**52%** AGREE

Base: All establishments (4,009)
Entry to work
Employers with vacancies in the last 12 months

Scotland: 49% of employers had vacancies in the last 12 months

Base: All Scotland establishments (4,009)

- 26% for 2-4 establishments
- 62% for 5-9 establishments
- 77% for 10-24 establishments
- 90% for 25-49 establishments
- 91% for 50-99 establishments
- 95% for 100+ establishments

Base: All Scotland establishments: Public Admin. (109), Education (172), Health & Social Work (463), Hotels & Restaurants (448), Wholesale & Retail (847), Arts & Other Services (281), Financial Services (91), Manufacturing (187), Transport & Comms (233), Business Services (669), Construction (252), Primary Sector & Utilities (257)
Recruitment channels used

- **Word of mouth or personal recommendations**: 77%
- **Placed adverts on your own website using internal resources**: 55%
- **Placed adverts on social media using internal resources**: 47%
- **Another form of paid-for recruitment service, including the press**: 40%
- **Government recruitment service or scheme**: 38%
- **School, college or university job fairs or careers services**: 20%
- **Paid someone to place adverts on your website or social media**: 9%

**Internal resources**
- **ANY**: 91%
- **SOLE**: 29%

**External resources**
- **ANY**: 67%
- **SOLE**: 5%

Base: All Scotland recruiting employers (2,605)

Note: Multiple responses were allowed.

“Any recruitment channel” refers to employers who used an internal or external recruitment channel, in conjunction with others. “Sole recruitment channel” refers to those employers who used either internal or external resources as their only method of recruitment.
What employers look for when recruiting

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<th>No value</th>
<th>Small amount of value</th>
<th>Significant</th>
<th>Critical</th>
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<td>Relevant work experience</td>
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<tr>
<td>Maths &amp; English GCSE</td>
<td>17%</td>
<td>25%</td>
<td>36%</td>
<td>20%</td>
</tr>
<tr>
<td>Vocational qualifications</td>
<td>19%</td>
<td>29%</td>
<td>34%</td>
<td>14%</td>
</tr>
<tr>
<td>Academic qualifications</td>
<td>21%</td>
<td>30%</td>
<td>31%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Base: All Scotland employers (2016: 4,009, 2014: 4,015)
What employers look for: relevant work experience

Scotland: 67% of employers look for relevant work experience

Base: All Scotland establishments (4,009)

Department for Education

Produced by IFF Research
What employers look for: maths and English

Scotland: 56% of employers look for maths and English

Base: All Scotland establishments (4,009)

Base: All Scotland establishments: Financial Services (91), Business Services (669), Public Admin. (109), Education (172), Transport & Comms (233), Manufacturing (187), Health & Social Work (463), Construction (252), Wholesale & Retail (847), Arts & Other (281), Primary Sector & Utilities (257) Hotels & Restaurants (448)

Base: All Scotland establishments: 2-4 (1,004), 5-9 (983), 10-24 (905), 25-49 (519), 50-99 (289), 100+ (309)
What employers look for: vocational qualification

Scotland: 48% of employers look for vocational qualifications

Base: All Scotland establishments (4,009)

Base: All Scotland establishments: 2-4 (1,004), 5-9 (983), 10-24 (905), 25-49 (519), 50-99 (289), 100+ (309)

<table>
<thead>
<tr>
<th>Sector</th>
<th>2-4</th>
<th>5-9</th>
<th>10-24</th>
<th>25-49</th>
<th>50-99</th>
<th>100+</th>
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</thead>
<tbody>
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<td>69%</td>
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<td>53%</td>
<td>51%</td>
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<td>57%</td>
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<td>Public Admin.</td>
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<td>53%</td>
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<tr>
<td>Primary Sector &amp; Utilities</td>
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<td>48%</td>
<td>54%</td>
<td>52%</td>
<td>57%</td>
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<tr>
<td>Construction</td>
<td>48%</td>
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<td>48%</td>
<td>54%</td>
<td>52%</td>
<td>57%</td>
</tr>
<tr>
<td>Transport &amp; Comms</td>
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<td>54%</td>
<td>52%</td>
<td>57%</td>
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<tr>
<td>Manufacturing</td>
<td>49%</td>
<td>49%</td>
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<td>Financial Services</td>
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<td>Wholesale &amp; Retail</td>
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<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Base: All Scotland establishments: Education (172), Primary Sector & Utilities (257), Health & Social Work (463), Construction (252), Arts & Other (281), Transport & Comms (233), Business Services (669), Financial Services (91), Public Admin. (109), Manufacturing (187), Wholesale & Retail (847), Hotels & Restaurants (448)
Scotland: 47% of employers look for academic qualifications

Base: All Scotland establishments (4,009)
Recruitment of young people (aged under 25)

Scotland: 64% of recruiting employers had taken on a young person in the last 12 months

Base: All Scotland employers who had recruited (2,470)

Base: All Scotland establishments who had recruited: 2-4 (220), 5-9 (573), 10-24 (669), 25-49 (460), 50-99 (258), 100+ (290)

Department for Education

Produced by IFF Research
Channels used to recruit young people

**Internal resources**
- Word of mouth or personal recommendations: 60%
- Placed adverts on your own website using internal resources: 37%
- Placed adverts on social media using internal resources: 28%
- Another form of paid-for recruitment service, including the press: 18%
- School, college or university job fairs or careers services: 14%
- Government recruitment service or scheme: 11%
- Paid someone to place adverts on your website or social media: 8%

**External resources**
- ANY: 78%
- SOLE: 51%

**Internal resources**
- ANY: 40%
- SOLE: 15%

Base: All Scotland establishments that have taken on a young person in the last year (1,738)

Note: Multiple responses were allowed.

"Any recruitment channel" refers to employers who used an internal or external recruitment channel, in conjunction with others. "Sole recruitment channel" refers to those employers who used either internal or external resources as their only method of recruitment.
Recruitment of education leavers

Scotland: 32% had recruited an education leaver in the last 12 months

Base: All Scotland employers (4,009)

- 2-4: 19%
- 5-9: 34%
- 10-24: 49%
- 25-49: 62%
- 50-99: 64%
- 100+: 74%

Base: All Scotland establishments: 2-4 (1,004), 5-9 (983), 10-24 (905), 25-49 (519), 50-99 (289), 100+ (309)

Department for Education

Base: All Scotland establishments: Education (172), Manufacturing (187), Public Admin. (109), Hotels & Restaurants (448), Wholesale & Retail (847), Arts & Other (281), Health & Social Work (463), Construction (252), Transport & Comms (233), Business Services (669), Primary Sector & Utilities (257), Financial Services (91)
Preparedness of education leavers for work

Secondary school leavers
- Very poorly prepared: 5%
- Poorly prepared: 25%
- Well prepared: 53%
- Very well prepared: 12%

FE leavers
- Very poorly prepared: 2%
- Poorly prepared: 12%
- Well prepared: 63%
- Very well prepared: 17%

University/HE leavers
- Very poorly prepared: 3%
- Poorly prepared: 9%
- Well prepared: 59%
- Very well prepared: 25%

Base: All Scotland establishments that have recruited each type of education leaver in the previous 2-3 years: Secondary school leavers (1052), FE leavers (707), University/HE leavers (827)
Work experience offered in last 12 months

39% of employers in Scotland offered work placements

- **Education placements**: 18%
  - Students at school: 21%
  - Students at FE or 6th Form College: 10%
  - Students at University: 13%

- **Broad Adult Placements**: 15%
  - Work trials: 9%
  - Placements for unemployed: 7%
  - Voluntary work (unprompted*): 1%
  - Special needs/Disability programme: <1%

- **Internships**: 7%
  - Internships, either paid or unpaid: 7%

- **Work Inspiration**: 13%
  - Employers engaged with schools, colleges or universities to offer ‘work inspiration’ activities, such as mentoring, holding site visits and visiting educational institutions to talk with students about careers

*Where respondents had offered other types of work experience which did not fit within the pre-coded answer options, they were able to provide detail for an “other” type of work placement experience.*

Base: All Scotland establishments (4,009)
Work placement offering, by sector

ANY PLACEMENT

39% 74% 61% 55% 47% 39% 37% 33% 32% 30% 30% 28% 24%

ANY EDUCATION PLACEMENT

Total: 70%
Health & Social Work: 53%
Public Admin.: 44%
Arts & Other Services: 44%
Business Services: 39%
Hotels & Restaurants: 33%
Construction: 23%
Wholesale & Retail: 23%
Manufacturing: 22%
Transport & Comms: 21%
Primary Sector & Utilities: 21%
Financial Services: 20%

ANY BROAD ADULT PLACEMENT

Base: All establishments: Total (4,009), Education (172), Health & Social Work (463), Public Admin. (109), Arts & Other (281), Business Services (669), Hotels & Restaurants (448), Construction (252), Wholesale & Retail (847), Manufacturing (187), Transport & Comms (233), Primary Sector & Utilities (257), Financial Services (91)
Work placement offering, by establishment size

<table>
<thead>
<tr>
<th>Establishment Size</th>
<th>ANY PLACEMENT</th>
<th>ANY EDUCATION PLACEMENT</th>
<th>ANY BROAD ADULT PLACEMENT</th>
<th>ANY INTERNSHIP</th>
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</thead>
<tbody>
<tr>
<td>Total</td>
<td>30%</td>
<td>15%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>2-4</td>
<td>21%</td>
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<tr>
<td>5-9</td>
<td>30%</td>
<td>30%</td>
<td>16%</td>
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<td>10-24</td>
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<td>25-49</td>
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<td>50-99</td>
<td>58%</td>
<td>58%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>100+</td>
<td>67%</td>
<td>67%</td>
<td>30%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Base: All Scotland establishments: Total (4,009), 2-4 (1,004), 5-9 (983), 10-24 (905), 25-49 (519), 50-99 (289), 100+ (309)
Types of work placement offered

- Placements for students from school: 21%
- Placements for students from university: 13%
- Placements for students from FE College or 6th form: 10%
- Work trials for potential new recruits: 9%
- Placements targeted at the unemployed: 7%
- Internships, either paid or unpaid: 7%
- Voluntary work (unprompted): 1%

Taken on individual into a job

Base: All Scotland employers (4,009)

Base: Establishments who had each type of placement in the last 12 months: school (1,045), university (710), FE College (589), work trials (471), unemployed (371), internships (401), voluntary (33)

* denotes a base size of 25-49 employers and should be treated with caution
Mean number of work placements offered in the last 12 months, by establishment size

Base: All Scotland establishments: 2-4 (281), 5-9 (382), 10-24 (469), 25-49 (339), 50-99 (194), 100+ (237)
Mean number of work placements offered in the last 12 months, by sector

Base: All Scotland establishments who have had placements in the last 12 months: Education (487), Health & Social Work (672), Public Admin. (111), Hotels & Restaurants (494), Financial Services (105), Wholesale & Retail (840), Transport & Comms (314), Arts & Other (322), Business Services (879), Primary Sector & Utilities (160), Manufacturing (264), Construction (199)
Employers offering work inspiration activities to students

Scotland: 13% of employers offered work experience activities to students

Base: All Scotland establishments (4,009)

Bar chart showing the percentage of employers offering work experience activities to students across different size categories and industries.

- **2-4 (8%)**
- **5-9 (11%)**
- **10-24 (18%)**
- **25-49 (28%)**
- **50-99 (30%)**
- **100+ (47%)**

Bar chart showing the percentage of employers offering work experience activities to students across different industries:

- **Education (40%)**
- **Public Admin. (39%)**
- **Health & Social Work (21%)**
- **Arts & Other Services (16%)**
- **Financial Services (15%)**
- **Business Services (15%)**
- **Transport & Comms (14%)**
- **Manufacturing (11%)**
- **Primary Sector & Utilities (10%)**
- **Wholesale & Retail (7%)**
- **Hotels & Restaurants (7%)**
- **Construction (7%)**

Base: All establishments: Education (172), Public Admin. (109), Health & Social Work (463), Arts & Other (281), Financial Services (91), Business Services (669), Transport & Comms (233), Manufacturing (187), Primary Sector & Utilities (257), Wholesale & Retail (847), Hotels & Restaurants (448), Construction (252)
Reasons for offering work experience opportunities

**PLACEMENTS**

- **Altruistic (72%)**
  - Gives them experience
  - Doing our "bit" / uphold relations with the local community
  - Part of formal corporate social responsibility policy
  - Existing links with educational institutions

- **Direct benefit (39%)**
  - Helps with recruitment / as a trial
  - Helps with the workload
  - Raises our profile in the recruitment market
  - Beneficial to the company (e.g. fresh ideas/up to date skills etc.)

- **Circumstantial (10%)**
  - Approached by student or educational institution
  - Favour for family member or friend

**INSPIRATION**

- **77%**

Base: All Scotland establishments who have had work placements / offered work inspiration in the last 12 months (1,902 / 722)

Note: Multiple responses were allowed.
Reason for not offering work experience

- No suitable roles: 35%
- Do not have the time / resource to manage: 22%
- No one has approached us: 15%
- Not suitable due to the size of the establishment: 11%
- Recruitment freeze: 9%
- Does not offer us any business benefits: 5%
- Regulatory requirements: 5%
- Never thought about it: 5%
- Company policy / Head Office decision: 5%
- Age restrictions: 4%
- Recruit experienced staff through other avenues: 3%
- No need (unspec.): 3%
- Don't have the work to offer them: 3%

Base: All Scotland establishments offering no work experience opportunities in the last 12 months (1,918)
Note: Multiple responses were allowed.
People development
Summary of approach to training

73% had provided training for staff

63% provide internal training
38% provide both external & internal training
48% provide external training

27% don’t provide or fund any training

44% provide external training through private providers
10% provide external training through both private and public providers
13% provide external training through public providers

Base: All Scotland employers (4,009)
Scotland: 13% of employers who train used FE colleges as a source of training

Base: All Scotland establishments who train (3,288)

- Education: 28%
- Construction: 25%
- Health & Social Work: 21%
- Public Admin.: 19%
- Arts & Other Services: 16%
- Primary Sector & Utilities: 16%
- Manufacturing: 15%
- Business Services: 8%
- Hotels & Restaurants: 8%
- Wholesale & Retail: 7%
- Transport & Comms: 7%
- Financial Services: 1%

Base: All Scotland establishments who train: 2-4 (581), 5-9 (804), 10-24 (820), 25-49 (504), 50-99 (277), 100+ (302)
Higher Education Institutions as a source of training

Scotland: 9% of employers who train used Higher Education Institutions as a source of training

Base: All Scotland establishments who train (3,288)

Base: All Scotland establishments who train: Education (162), Public Admin (105), Health & Social Work (438), Business Services (540), Arts & Other (222), Manufacturing (147), Construction (197), Financial Services (82), Primary Sector & Utilities (192), Transport & Comms (184) Wholesale & Retail (654), Hotels & Restaurants (365).
Commercial organisations as a source of training

Scotland: 49% of employers who train used commercial organisations as a source of training.

Base: All Scotland establishments who train (3,288)

Base: All Scotland establishments who train: 2-4 (581), 5-9 (804), 10-24 (820), 25-49 (504), 50-99 (277), 100+ (302)

<table>
<thead>
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<th>Industry</th>
<th>2-4</th>
<th>5-9</th>
<th>10-24</th>
<th>25-49</th>
<th>50-99</th>
<th>100+</th>
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<tbody>
<tr>
<td>Primary Sector &amp; Utilities</td>
<td>58%</td>
<td>56%</td>
<td>55%</td>
<td>54%</td>
<td>49%</td>
<td>42%</td>
</tr>
<tr>
<td>Education</td>
<td>56%</td>
<td>56%</td>
<td>55%</td>
<td>53%</td>
<td>47%</td>
<td>45%</td>
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<tr>
<td>Construction</td>
<td>58%</td>
<td>56%</td>
<td>55%</td>
<td>54%</td>
<td>49%</td>
<td>42%</td>
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<tr>
<td>Business Services</td>
<td>56%</td>
<td>56%</td>
<td>55%</td>
<td>54%</td>
<td>49%</td>
<td>42%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>54%</td>
<td>53%</td>
<td>55%</td>
<td>47%</td>
<td>45%</td>
<td>39%</td>
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<td>Health &amp; Social Work</td>
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<td>Financial Services</td>
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<td>Wholesale &amp; Retail</td>
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</table>

Base: All establishments who train: Primary Sector & Utilities (192), Education (162), Construction (197), Business Services (540), Manufacturing (147), Health & Social Work (438), Transport & Comms (184), Public Admin (105), Arts & Other (222), Hotels & Restaurants (365), Financial Services (82), Wholesale & Retail (654)
Reasons for choosing to invest resource in public training providers

**Reasons for using**

- Relevant courses: 62% (2016), 66% (2014)
- Offer a regulated qualification*: 15% (2016), 10% (2014)
- Quality of courses: 10% (2016), 11% (2014)
- They are local: 9% (2016), 13% (2014)
- Courses tailored to needs: 10% (2016), 12% (2014)

* Added as a pre-code answer in 2016

**Barriers to using**

**FE Colleges**

- Courses not relevant: 40% (2016), 47% (2014)
- Subject matter not relevant: 17% (2016), 8% (2014)
- Do not know enough: 6% (2016), 7% (2014)
- Prefer to train in-house: 6% (2016), 7% (2014)
- Quality/standard unsatisfactory: 5% (2016), 3% (2014)

**HEIs**

- Courses not relevant: 42% (2016), 46% (2014)
- Subject matter not relevant: 13% (2016), 9% (2014)
- Do not know enough: 7% (2016), 5% (2014)
- Training more advanced than needed: 5% (2016), 5% (2014)
- Lack of information available: 5% (2016), 3% (2014)

Base (2016/2014): All Scotland employers who use FE Colleges or HEIs to deliver training (699/796)

Base (2016/2014): All Scotland employers who have not used FE colleges for external training and were asked why (986/944)

Base (2016/2014): All Scotland employers who have not used HEIs for external training and were asked why (1,163/1,215)
Take-up of vocational qualifications

Scotland: 26% of employers had arranged or funded training designed to lead to a recognised vocational qualification in the last 12 months.

Base: All Scotland employers (4,009)

- 2-4: 13%
- 5-9: 28%
- 10-24: 40%
- 25-49: 54%
- 50-99: 61%
- 100+: 70%

Base: All Scotland employers: 2-4 (1,004), 5-9 (983), 10-24 (905), 25-49 (519), 50-99 (289), 100+ (309)

- Education: 51%
- Health & Social Work: 48%
- Public Admin.: 44%
- Financial Services: 31%
- Arts & Other Services: 27%
- Hotels & Restaurants: 26%
- Construction: 24%
- Manufacturing: 24%
- Wholesale & Retail: 23%
- Business Services: 22%
- Primary Sector & Utilities: 20%
- Transport & Comms: 15%

Base: All Scotland employers: Education (172), Health & Social Work (463), Public Admin. (109), Financial Services (91), Arts & Other (281), Hotels & Restaurants (448), Construction (252), Manufacturing (187), Wholesale & Retail (847), Business Services (669), Primary Sector & Utilities (257), Transport & Comms (233),
Business benefits and impacts of vocational qualifications

**Business benefits of vocational qualifications**

- Can be adapted to business needs
  - 2014: 11% disagree strongly, 38% disagree slightly, 47% neither agree nor disagree, 6% agree slightly, 12% agree strongly
  - 2016: 6% disagree strongly, 11% disagree slightly, 35% neither agree nor disagree, 35% agree slightly, 12% agree strongly

- Offers good value for money
  - 2014: 4% disagree strongly, 14% disagree slightly, 35% neither agree nor disagree, 39% agree slightly, 11% agree strongly
  - 2016: 4% disagree strongly, 14% disagree slightly, 35% neither agree nor disagree, 39% agree slightly, 11% agree strongly

**Impact of vocational qualifications**

- Better business performance
  - 2014: 9% disagree strongly, 26% disagree slightly, 60% neither agree nor disagree, 11% agree slightly, 6% agree strongly
  - 2016: 9% disagree strongly, 26% disagree slightly, 60% neither agree nor disagree, 11% agree slightly, 6% agree strongly

- Improved staff retention
  - 2014: 7% disagree strongly, 13% disagree slightly, 27% neither agree nor disagree, 50% agree slightly, 6% agree strongly
  - 2016: 7% disagree strongly, 13% disagree slightly, 27% neither agree nor disagree, 50% agree slightly, 6% agree strongly

Base: All Scotland employers who had arranged/funded training towards vocational qualifications in the previous 12 months (2014/2016): 1,526/1,443

Figures will not add up to 100% as “don’t know” answers are not displayed.
Barriers of training staff to vocational qualifications

- VQs are too complicated for our needs: 21%
- VQs are too much bureaucracy: 21%
- VQs take too long to deliver: 20%
- Relevant VQs are not available to us: 14%
- VQs are not as rigorous as other qualifications: 12%
- Staff don’t want VQs: 30%
- The training we already provide is sufficient: 13%
- The government does not provide grants/funding to cover the costs: 29%
- VQs are too expensive to deliver: 24%
- Cutbacks in our training budget: 20%
- Lack of information/knowledge about VQs: 37%

Base (2014/2016): All Scotland employers who have not arranged training in the last 12 months that has led to a Vocational Qualification: (1,799/1,845)

Note: Multiple responses were allowed.
External help sought on skills and training

- **18%** Training Providers
  - Commercial or not for profit training provider: 14%
  - College: 7%
  - University: 4%

- **16%** Collectives & Representatives
  - Professional body: 11%
  - Other employers: 5%
  - Chamber of Commerce: 2%
  - Trade Union: 1%

- **15%** Public Sector
  - Local Authority: 6%
  - Sector Skills Council: 6%
  - Business Gateway: 3%
  - Scottish Enterprise: 3%
  - Highlands and Islands Enterprise: 1%

- **5%** Other Private
  - Consultancy: 4%
  - Suppliers: <1%

Base: All Scotland employers (4,009)

Produced by IFF Research
Scotland: 14% of employers have worked with others to develop skills or expertise in the workforce.

Base: All Scotland establishments (4,009)
Scotland: 49% of employers who have arranged or funded external training in the past 12 months that was designed to lead to a Vocational Qualification have had some involvement in the design of its content.

Base: All Scotland employers who have trained staff using vocational qualifications in last 12 months (1,443)

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Employer involvement in designing content of vocational qualifications

- 2-4: 48%
- 5-9: 47%
- 10-24: 47%
- 25-49: 48%
- 50-99: 59%
- 100+: 57%

Base: All Scotland employers who have trained staff using vocational qualifications in last 12 months: 2-4 (132), 5-9 (275), 10-24 (365), 25-49 (277), 50-99 (179), 100+ (215)

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Employer involvement in designing content of vocational qualifications by sector:

- Hotels & Restaurants: 60%
- Business Services: 53%
- Manufacturing: 53%
- Transport & Comms: 51%
- Education: 50%
- Primary Sector & Utilities: 49%
- Health & Social Work: 47%
- Wholesale & Retail: 45%
- Construction: 44%
- Arts & Other Services: 43%
- Public Admin.: 40%
- Financial Services: 30%*

Base: All Scotland employers who have trained staff using vocational qualifications in last 12 months: Hotels & Restaurants (158), Business Services (211), Manufacturing (68), Transport & Comms (58), Education (96), Primary Sector & Utilities (76), Health & Social Work (274), Wholesale & Retail (228), Construction (92), Arts & Other (93), Public Admin. (58), Financial Services (31).

* denotes a base size of between 25-49 employers and should be treated with caution.
Employer involvement in designing content of external training

Scotland: 43% of employers who have arranged external training in the past 12 months have had some involvement in the design of its content.

Base: All Scotland establishments that provide external training (2,365)

Bar chart showing the percentage of employers involved in designing training content for establishments of different sizes:

- 2-4: 38%
- 5-9: 42%
- 10-24: 48%
- 25-49: 47%
- 50-99: 54%
- 100+: 52%

Bar chart showing the percentage of employers involved in designing training content by sector:

- Education: 59%
- Health & Social Work: 52%
- Public Admin. & Comms: 49%
- Transport & Comms: 47%
- Business Services: 46%
- Construction: 44%
- Manufacturing: 43%
- Arts & Other Services: 42%
- Wholesale & Retail: 38%
- Hotels & Restaurants: 37%
- Financial Services: 37%
- Primary Sector & Utilities: 32%

Base: All Scotland establishments that provide external training: Education (515), Health & Social Work (851), Public admin (165), Transport & Comms (389), Business Services (1,151), Construction (421), Manufacturing (394), Arts & Other (348), Wholesale & Retail (914), Hotels & Restaurants (455), Financial Services (125), Primary Sector & Utilities (244)
Awareness and use of the National Occupational Standards in Scotland

- Good knowledge: 5%
- Aware with some knowledge: 15%
- Aware but don't know what they are: 21%
- Not heard of NOS: 59%

Scotland: 40% any awareness of NOS (2014: 40%)

11% of all Scotland employers used NOS... (2014: 10%)

- To develop training plans to meet the establishment’s training needs: 8% (2014: 7%)
- For staff appraisals or performance management: 8% (2014: 6%)
- To develop job descriptions or guide recruitment criteria: 7% (2014: 6%)
- For succession planning or competency frameworks: 6% (2014: 6%)

Base (2016/2014): All Scotland establishments (4,009/4,015)
An overview

Scotland: 15% of establishments offered apprenticeships

Base: All Scotland establishments (4,009)

2-4: 9%
5-9: 15%
10-24: 19%
25-49: 34%
50-99: 35%
100+: 49%

Base: All Scotland establishments: 2-4 (1,004), 5-9 (983), 10-24 (905), 25-49 (519), 50-99 (289), 100+ (309)

Construction: 38%
Education: 35%
Public Admin.: 25%
Manufacturing: 22%
Wholesale & Retail: 16%
Financial Services: 16%
Health & Social Work: 12%
Arts & Other Services: 12%
Transport & Comms: 10%
Hotels & Restaurants: 9%
Business Services: 9%
Primary Sector & Utilities: 8%

Base: All Scotland establishments: Construction (252), Education (172), Public Admin. (109), Manufacturing (187), Wholesale & Retail (647), Financial Services (91), Health & Social Work (463), Arts & Other (281), Transport & Comms (233), Hotels & Restaurants (448), Business Services (669), Primary Sector & Utilities (257)
Apprenticeships by establishment size

- **2012**: Base for 2016: All Scotland establishments: 2-4 (1,004), 5-9 (983), 10-24 (905), 25-49 (519), 50-99 (289), 100+ (309)

Bar chart showing the percentage of establishments that have/offer apprenticeships by establishment size for 2012, 2014, and 2016.
Apprenticeships by sector

% of establishments that have/off apprenticeships

Base: All Scotland establishments: Construction (252), Education (172), Public Admin. (109), Manufacturing (187), Wholesale & Retail (847), Financial Services (91), Health & Social Work (463), Arts & Other (281), Transport & Comms (233), Hotels & Restaurants (448), Business Services (669), Primary Sector & Utilities (257)

* denotes a base size of between 25-49 employers and should be treated with caution
Whether approached by external agencies about offering apprenticeships

- Initiated by the establishment
- Approached by another individual or organisation
- A bit of both
- Don't know

Base for pie chart: All Scotland establishments that started offering apprenticeships in the last 3 years (221)

Base for bars: All establishments that were approached by an individual / organisation (56)
Reasons for offering apprenticeships, amongst employers who have recently started to offer them

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good way to get skilled staff</td>
<td>35%</td>
</tr>
<tr>
<td>Ensure young people continue to enter the company / industry</td>
<td>19%</td>
</tr>
<tr>
<td>Want to upskill current staff</td>
<td>13%</td>
</tr>
<tr>
<td>We could shape our own apprenticeship framework</td>
<td>4%</td>
</tr>
<tr>
<td>Demand among existing staff</td>
<td>4%</td>
</tr>
<tr>
<td>Improve staff morale / retention</td>
<td>4%</td>
</tr>
<tr>
<td>To train people from scratch / to our needs</td>
<td>2%</td>
</tr>
<tr>
<td>To improve general skills/knowledge of new and existing staff</td>
<td>1%</td>
</tr>
<tr>
<td>Good way to give young people a chance</td>
<td>19%</td>
</tr>
<tr>
<td>To help the community / corporate social responsibility</td>
<td>2%</td>
</tr>
<tr>
<td>Availability of grants</td>
<td>6%</td>
</tr>
<tr>
<td>Good value for money / cost effective</td>
<td>1%</td>
</tr>
<tr>
<td>Anticipating the apprenticeship levy</td>
<td>1%</td>
</tr>
</tbody>
</table>

Note: multiple responses were allowed.
Reasons for not offering apprenticeships

61% Perceived structural barriers

- Apprenticeships are not suitable for our size: 18%
- Not looking to recruit new staff: 15%
- Apprenticeships are not offered for our industry: 15%
- Cannot afford to: 8%
- Do not have the time to train them: 3%
- No need as all staff are fully skilled: 12%
- Does not suit our business model: 10%
- Prefer to recruit experienced staff: 5%
- Prefer other forms of training: 4%
- Past apprentices were of a poor standard: 1%
- Never have before so not considered it: 5%
- Do not know enough about them: 2%
- No one has enquired about doing one: 1%

31% Actively choosing not to

10% Lack of awareness

Base: All Scotland establishments not offering apprenticeships (3,192)
Note: multiple responses were allowed.
Types of external training providers used for apprenticeships

80% of establishments offering apprenticeships had used an external provider to deliver at least some of the training for their apprentices.

- A Further Education college: 49%
- A commercial training provider: 43%
- A professional body: 32%
- A university or higher education institution: 12%
- A non-profit making organisation: 11%
- Other: 1%

Base: All Scotland establishments who have or offer apprenticeships (817)

Base: All establishments whose apprentices receive external training (684)
Employer involvement in designing external training

Scotland: 52% employers whose apprentices receive external training have had involvement in the design of the content

Base: All Scotland establishments whose apprentices receive external training (684)

Base: All Scotland establishments whose apprentices receive external training: Manufacturing (52), Primary Sector & Utilities (32), Health & Social Work (58), Business Services (87), Construction (105), Transport & Comms (34), Wholesale & Retail (137), Hotels & Restaurants (54)

** denotes a figure not shown due to a base size of fewer than 25 employers
* denotes a base size of between 25-49 employers and should be treated with caution
Scotland: 31% employers not currently offering apprenticeships were aware of apprenticeships and had at least a (self described) good knowledge of what they involve.

Awareness and knowledge of apprenticeships

Base: All Scotland establishments not offering apprenticeships (3,192)

- 2-4: 32%
- 5-9: 29%
- 10-24: 30%
- 25-49: 30%
- 50-99: 36%
- 100+: 37%

Base: All Scotland establishments not offering apprenticeships: 2-4 (913), 5-9 (840), 10-24 (725), 25-49 (362), 50-99 (188), 100+ (164)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Awareness (51%)</th>
<th>Knowledge (43%)</th>
<th>Awareness (40%)</th>
<th>Knowledge (40%)</th>
<th>Awareness (32%)</th>
<th>Knowledge (32%)</th>
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<th>Knowledge (23%)</th>
<th>Awareness (17%)</th>
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<tr>
<td>Construction</td>
<td>51%</td>
<td>43%</td>
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</table>

Base: All Scotland establishments not offering apprenticeships: Construction (126), Public Admin. (77), Education (105), Manufacturing (127), Business Services (563), Arts & Other (245), Wholesale & Retail (1,614), Health & Social Work (399), Primary Sector & Utilities (218), Hotels & Restaurants (381), Transport & Comms (194), Financial Services (72)
Awareness of specific government-recognised apprenticeship schemes

- Modern apprenticeships: 62% (2016), 60% (2012), 57% (2014)
- Professional apprenticeships: 20% (2016), 21% (2014), 19% (2012)
- Advanced level apprenticeships: 20% (2016), 23% (2014), 22% (2012)

Base (2012/2014/2016): All Scotland establishments (2,000 / 4,015 / 4,009)
Awareness and use of Apprenticeship services

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<tr>
<td><strong>Skills Development Scotland</strong></td>
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<tr>
<td>2016</td>
<td>11%</td>
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<td>2014</td>
<td>9%</td>
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<td>2012</td>
<td>6%</td>
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<tr>
<td><strong>Adopt an Apprentice</strong></td>
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<td>2016</td>
<td>8%</td>
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<td>2014</td>
<td>7%</td>
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<td>2012</td>
<td>1%</td>
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<tr>
<td><strong>Group Training Associations</strong></td>
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<td>2016</td>
<td>1%</td>
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<td>2014</td>
<td>1%</td>
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<tr>
<td>2012</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base (2012/2014/2016): All Scotland establishments (2,000 / 4,015 / 4,009)

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Future demand for apprenticeships

All Scotland establishments

Base: 4,009

Offers apprenticeships 15%

Whether plan to offer in future?

Yes, plan to offer in future 87%

No 6%

Don’t know 6%

Base: 817

Does not offer apprenticeships 85%

Whether plan to offer in future?

Yes, plan to offer in future 17%

No 69%

Don’t know 13%

Base: 3,192

25% of all Scotland establishments plan to offer apprenticeships in future
Reasons for planning to start offering apprenticeships

66% Acquiring talent
- Good way to get skilled staff: 31%
- To expand the business: 23%
- Ensure young people continue to enter the company/industry: 22%
- Good way to give young people a chance: 14%

18% Altruistic
- To help people into work: 5%
- To train people from scratch/to our needs: 5%
- Want to upskill current staff: 4%
- Improve skills/knowledge of new and existing staff: 4%

17% Nurturing talent
- Demand among existing staff: 3%
- We can shape our own apprenticeship framework: 2%

4% Financial
- Availability of grants: 2%
- Good value for money/cost effective: 1%
- Anticipating the apprenticeship levy: <1%

Base: All Scotland establishments that plan to start offering apprenticeships in future (480).
Note: multiple responses were allowed.
Change in apprentice numbers (past and future)

Change since first started offering apprenticeships
- Increase: 21%
- Stay about the same: 66%
- Decrease: 4%
- Don’t know: 9%

Expected change in next 2 years
- Increase: 24%
- Stay about the same: 69%
- Decrease: 4%
- Don’t know: 3%

Base: All Scotland establishments with current apprentices (569)

Note: breakdowns by region and sector are not show due to low base sizes.
Conclusions
How establishments support the pipeline of talent into businesses and entry routes into employment

- Despite persistent issues relating to hard-to-fill and skill-shortage vacancies (as reported in ESS 2015), employers use a fairly limited number and range of recruitment channels to bring talent into their business.

  - The majority of employers who recruited someone (77%) used word of mouth / personal recommendations to access the potential labour market. (10% used this as their sole method of recruitment).

  - As well as limiting the range of potential applicants that employers have access to, this has the impact of restricting jobseekers’ routes to employment.

- Employers value work experience above qualifications (whether academic or vocational) as a means of gauging the quality and potential of new recruits.

- Developing forms of work experience and work inspiration that genuinely respond to employers’ needs to develop and access experienced new recruits offers potential to improve individuals’ entry to the labour market.
How to increase the provision of apprenticeships

- In light of recent policy initiatives to increase the uptake of apprenticeships (including the Scottish Government’s target of supporting 30,000 Modern Apprenticeships starts per year by 2020), EPS 2016 presents a positive picture in terms of increases in the proportion of establishments offering apprenticeships and the number of apprentices taken on.

- Among employers that had started offering apprenticeships in the last three years, the most common reasons for having done so related to them being viewed as a means to acquire new talent. Among employers not offering apprenticeships, perceived structural barriers were common (e.g. perceiving apprenticeships to be unsuitable for their size or sector).

  - The findings on reasons why employers engage or not engage with apprenticeships may serve as useful tools to inform communications with employers to support increased engagement with apprenticeships.

- A quarter (25%) of Scotland establishments were planning to offer apprenticeships in future.

- Potential to increase apprenticeship numbers also exists among establishments already offering them. Almost a quarter (24%) of these employers with plans to continue offering apprenticeships expected to increase the number of apprentices they employ over the next two years.
How to stimulate employer input into the design, delivery and content of skills initiatives

- New for EPS 2016, the survey provides a measure of the extent of collaboration and employer input into the skills system.

- Just over half (52%) of employers in Scotland using an external training provider to deliver some of their apprenticeship training reported that they had some involvement in designing or tailoring the training content. This is similar to the 49% that had arranged training for their staff leading to a vocational qualification (VQ) being involved in designing the training content, both higher than the 43% of employers that had arranged external training in general for their staff that were involved in designing the training content.

- The higher level of involvement of employers in designing the training content delivered to their apprentices and for VQs suggests that employers providing these types of training for their staff were more engaged, or there is greater receptiveness among training providers to receive employer input for VQs and training for apprentices.
Sector differences

- Offering work placements was most common in the ‘non-market services’ sectors: 70% of Education employers had offered them, followed by 61% of Health and Social Work, and 55% of Public Administration employers.

- Offering apprenticeships was also most common in the Education sector (35% were offering apprenticeships at the time of the survey). The offering of apprenticeships was lowest among employers in Hotels and Restaurants and Primary Sector and Utilities (9% and 8% respectively).

- Employers in ‘non-market services’ sectors (Education, Public Administration, and Health and Social Work) were more likely than other sectors to have arranged or funded training leading to VQs for their staff.

- Employers in these sectors were also more likely than others to have collaborated with other employers on skills and training practices.