Research Report
No 209

A Survey of Employers' Awareness of NTOs

Questions Answered Ltd

The Views expressed in this report are the authors' and do not necessarily reflect those of the Department for Education and Employment.

ISBN 1 84185 298 8
August 2000

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Acknowledgements

Questions Answered Ltd (QA), authors of this report on behalf of the Department for Education and Employment would like to acknowledge the valuable support provided by a range of organisations, which have enabled this baseline study of employers' views of NTOs to be fulfilled successfully.

Firstly, we would like to thank Peter Weller, DfEE's Project Manager from Analytical Services Department for quality guidance and co-ordination of the various members of the Steering Group. We would like to thank members of the Steering Group for contributing throughout the project from inception through to analytical stages. These individuals are Claire Anderton (NTO National Council); Jim Dimond (NTO Division at the start of the project), Jock McCann (NTOD), Debra Bell (DfEE Analytical Services), Suzanne Gerard (NTOD Marketing and Publicity Division), Terry Caine (NTOD), Mervyn Humphries (NTOD) and Tony Kearsey (NTOD).

We would also like to thank NTO Chief Executives and their Research Managers (or equivalent officers) for contributing to the project prior to fieldwork commencing. Their views towards methodology were incorporated in the final survey, as were their views towards the phraseology of questions. We hope these organisations will get value from the research, not only in this inaugural year, but in years to come also.

And perhaps most importantly, we would like to acknowledge the kind participation in this survey by 3,507 individuals from businesses of all sizes across the UK, without whom of course there would be no report.

Executive Summary

National Training Organisations (NTOs) were launched in May 1998 by The Secretary of State to be “unique organisations – owned and driven by employers and recognised by Government.”[1] The vision for the NTO network, which at the time of this study comprised 70 recognised organisations including 6 all-sector NTOs, is for each NTO to become the automatically preferred point of reference for strategic leadership and practical guidance about skills and qualifications needs for a defined employment sector and / or range of occupations. Priority areas for action include taking action on skill needs and shortages; making lifelong learning a reality; serving the whole United Kingdom and building a stronger NTO network.

This survey was established in 1999 as the first dedicated piece of research to determine baseline data on the percentage and profile of UK employers who are aware of NTOs, understand the purpose of NTOs, and use their services. A representative sample of 3,507 employers were interviewed by telephone in September and October 1999 for this study.

Key findings

- **7.5%** of UK employers demonstrated an **unprompted** awareness of National Training Organisations when asked who they would contact in relation to training or skills locally, regionally, nationally or for their type of business.

- In addition to this unprompted awareness, a further **30.1%** of UK employers had heard of NTOs, their actual NTO or their predecessing Industry Training Organisation, Lead Body or Occupational Standards Council when prompted.

- The baseline percentage of employers aware of NTOs has therefore been determined as **37.6%** of all UK employers as at October 1999.

- Only **12%** of all businesses in the sample could articulate what they thought or understood to be the role of NTOs without being prompted. Of those that could provide a description, the vast majority did allude to at least one of the many broad functions of NTOs, but there were some misperceptions too. NTOs were perceived by employers to have a role of: providing advice and information; developing training frameworks; influencing partners, providers and their industry; encouraging new entrants into their industry; being the guardians of standards and to be training enablers.

- Of those businesses that had demonstrated an awareness of NTOs (37.6%), when prompted by a list of NTO functions the most popular perceptions were that NTOs were responsible for encouraging employers to train their workforce and influencing education and training providers to offer relevant courses and qualifications. If this is a true reflection of what employers feel NTOs are responsible for, then it underlines the necessity for the NTO Network to build up a robust and accurate level of awareness and understanding amongst all employers.

- NTOs have been more proactive at initiating contact with employers in their scope during the past 12 months than employers have been in contacting an NTO. Only 12% of employers aware of NTOs had actually contacted an NTO in the previous 12 months, whereas 22% of aware employers stated that they had received contact from their NTO in the same time period.

- Employers that did contact an NTO tended to want information about Modern Apprenticeships or to establish the availability of training courses.

[1] Foreword by David Blunkett, NTO Prospectus 1999-2000

- On the basis of the responses made by the small sample of 151 businesses that had contacted an NTO and used a service such as gaining information or advice, it is clear that levels of satisfaction are generally good. Furthermore, of these business that had experienced contact with an NTO almost nine in ten would recommend that NTO to others.

- A fifth of employers that had been aware of NTOs stated that they had received contact, mostly by way of letters or mailshots, from an NTO during 1999 / 2000.

- General attitudes towards NTOs are neither hugely positive nor negative. Arguably, employers were quite apathetic towards the role of NTOs since very few had had direct experience of or use of their services to date. Based upon their perceptions of NTOs though, a significant proportion of respondents felt that employers, employees or both would be the key beneficiaries.

- Employers felt that NTOs ought to be solely funded by Central Government (57% of all responses), although 13% felt that employer contribution coupled with Government funding was the most sensible regime for their existence. Few seemed to suggest that NTOs be self-funding. 25% of employers did not know, or did not have an opinion as to how NTOs should be funded.

- Improving business practices, keeping up with competition, tackling skills shortages and improving IT were the most important (prompted) business issues for employers in the forthcoming 12 months. Around a third of all employers stated these kind of issues as priority for their business in 1999/2000, and encouragingly between 41% and 54% of those with such issues felt that NTOs might be able to assist.

- A greater proportion of employers perceived that NTOs might be able to assist them with core business needs, than the actual number of employers that had contacted NTOs, suggesting a latent demand for assistance coupled with apathy to contacting an NTO to seek their help.

- 16% of employers said they were very or quite likely to contact an NTO in the next 12 months, which is a higher proportion than have contacted NTOs in the past year (12%). But nearly seven in ten employers were very or quite unlikely to make contact with an NTO in the next 12 months.

- Overall, those employers that have used their NTOs’ services have had a “good” experience that they would commend to others. But the main implication of this study appears to be that unless not just awareness, but actual understanding, of NTOs’ roles is engendered amongst the business community, their ability to truly develop a strategy that represents the industries within their scope to Government is seriously flawed. Furthermore, until awareness levels are higher and understanding greater, the likely influence that NTOs can exert with and through employers to other individuals or employees is likely to be limited.

Methodology

The Department for Education and Employment (DfEE) commissioned Questions Answered Ltd (QA) in July 1999 to undertake a survey of the views of a representative sample of employers in the United Kingdom (UK) towards National Training Organisations.

This survey intended to provide a baseline of employers' awareness, understanding and use of NTO services. A key factor in the future success of all NTOs will be how well employers know about and use them. Therefore it was important to assemble evidence about the level of employers' engagement with NTOs. This report is intentionally descriptive and factual and aims to summarise the key findings for a wider audience.

QA interviewed 3,507 employers by telephone during September and October 1999. The sample was designed in such a way to be representative of the UK's business population by sizeband and industry classification. Regional and country distribution of the sample was consistent with the actual distribution of businesses in the United Kingdom.

Awareness of NTOs

The baseline total awareness statistic for the 1999 Survey is 37.6% of all UK businesses aware of NTOs / ITOs. The approach of this survey has been to be very "inclusive" in terms of assessing awareness. As a point of reference ITOs no longer exist, and yet clearly an amount of awareness is still residual amongst some employers possibly to the disbenefit perhaps of NTOs trying to establish their new branding and stronger strategic remit.

Employers more likely to be aware of NTOs were larger (200+ employees) and in the construction or finance industries. Businesses located in Wales and the North East region of England were more likely to be aware of NTOs than other regions. Headquarter sites of businesses were more likely to know of NTOs than other sites. Businesses recognised or committed to Investors in People were more likely to be aware than non-recognised firms. The same was true for businesses with a recognised quality standard such as BS5750 or ISO9000 compared to those without; businesses with a training plan and training budget compared to those without.

Lowest levels of NTO awareness were found amongst businesses employing less than 10 people and amongst businesses in the transport / storage industries followed closely by businesses in the wholesale / retail industry. Interestingly, firms located in Merseyside consistently demonstrated the lowest levels of awareness and understanding of NTOs throughout this study. Awareness was also well below the baseline of 37.6% in Northern Ireland (30%).

Understanding of the Role of NTOs

When asked what they thought to be the role of NTOs only 31% of the 1,275 "aware" employers could provide a meaningful response. In turn, this equates to only 12% of the entire employer sample surveyed in 1999. It is our opinion that employers found it difficult on the whole to articulate what they felt NTOs were about.

The perceived role of NTOs differs amongst businesses that showed prompted awareness of NTOs and those who showed unprompted awareness of NTOs. As a crude indicator, those with unprompted awareness also had the best understanding of what NTOs were about. Conversely, the greater majority of those who had had to be prompted for awareness of NTOs had a less informed view of what NTOs were responsible for.

The assumption therefore that awareness of NTOs is not enough to encourage use of their services is, whilst perhaps extremely obvious, very well made. The challenge for NTOs is not simply to generate an awareness of their name or brand, but to engender and promote an understanding of what they are responsible for, and what they can do for businesses. Otherwise, at best, this baseline survey indicates that less than 12% of businesses that are actually aware of NTOs will ever make contact.

Two Way Communication and selling the benefits of NTOs to business

NTOs have been nearly twice as proactive as employers in initiating contact. There is, however, a direct correlation between businesses that have an unprompted awareness of NTOs and their proactive contact with NTOs. Those who demonstrated prompted awareness of NTOs, were much less likely to have contacted an NTO since they had a less informed understanding of what NTOs could do for them.

NTO communication with businesses appears to have been through traditional, impersonal methods including mostly mailshots or letters, but has it been effective. Questions Answered believes that communication by NTOs to employers needs to have a “direct call to action” wherever possible, whereby employers are encouraged to contact their NTO for reasons that meet their core business needs such as tackling skills shortages or improving IT or business practices.

The benefits of NTOs to businesses may need to be made more plainly in future, and the forthcoming publication of NTO Skills Foresights will perhaps provide NTOs with a particularly strong reason to initiate, maintain and engage the hearts and minds of employers within their scope. Knowing that the majority of businesses made contact with an NTO last year to get advice about Modern Apprenticeships, to establish the availability of training courses, or to obtain funding for training, may help NTOs to focus on key messages and services that are more likely to appeal to a larger proportion of businesses.

Wesbite developments, will no doubt ultimately provide an effective medium through which to reach a UK-wide base of businesses that need to be represented by NTOs. Meantime there is a call for further communication using direct mail, telephone and fax communication and personal methods where the relationship is more mature between NTOs and employers.

Using employer commendation and influence

Those who contacted an NTO were asked how satisfied they were with the “service” (advice / information) received. The overall calculations indicate that the service received is between “adequate” and “good” tending towards “good. Despite the small sample involved, 85% of the 151 businesses that contacted an NTO in 1998 / 1999 and used said they would recommend using an NTO to other employers. This level of recommendation is extremely high and needs to be nurtured over time with a greater proportion of businesses learning about and using the services that NTOs can provide. Employers are the best advocates of any service to other employers.

Attitudes towards NTOs

Beneficiaries

Whilst over 20 types of beneficiary were mentioned by respondents by far was the prevailing throughout that businesses, employees or both would most benefit from NTOs. A significant proportion of respondents did state that they felt NTOs would benefit young people, trainees or apprentices supporting the perception that one of the roles of NTOs was to encourage new entrants into their industry. Presumably, case studies will be or can be built up to demonstrate that these perceptions are well placed and that bottom-line benefits can be felt by individuals and businesses by being aware of and making use of NTO services.

When asked about their own business needs for the next 12 months, around a third of respondents said that tackling skills shortages, improving IT or business practices or keeping up with competition were central issues that they would need to overcome. Encouragingly, between 41% and 54% of businesses with these priority issues felt that NTOs could help them. There is an obvious opportunity it would seem to develop materials and messages that demonstrate how NTOs could practically help businesses develop solutions to these issues. A menu of over 25 “other” ways in which NTOs might help were recorded, the most significant ones being training, NVQ / SVQ specific issues, help with expansion and general development plans.

Funding

Nearly six in ten respondents felt that NTOs should be solely Government-funded. Those paying levies to their NTO were divided in their opinion as to its fairness. Few respondents talked of memberships, subscription or non-governmental funding streams such as Europe. Some felt that funding ought to change over time, with initial Government pump-priming moving towards self-funding, supported perhaps by the sale of services or courses used by businesses or individuals.

The Future

Almost 70% of all businesses aware of NTOs would be quite or very unlikely to contact their NTO in the next 12 months. There is a substantial minority of employers (14%) that could not say whether they would be in contact, but encouragingly 16% of businesses aware of NTOs are very or quite likely to contact their NTO in the next 12 months. This would indicate a forthcoming increase of enquiries compared to the 12% of employers that made contact in the past year. Interestingly 2,011 of the 3,507 employers interviewed for this study did express interest in knowing more about NTOs having been given a concise description of their remit, and asked for general printed information as a result of the survey. The challenge across the board presumably is to generate this kind of level of interest (nearly 60%) and convert that initial interest into understanding and ultimately usage of the NTO Network.

The final report produced for this survey includes all baseline statistics relating to awareness, understanding, usage and rating of NTOs and their services, which will be monitored in the future.

Chapter 1: Introduction

1.1 Background

The Department for Education and Employment (DfEE) commissioned Questions Answered Ltd (QA) to undertake a survey of the views of a representative sample of employers in the United Kingdom (UK). This survey intended to provide a baseline of employers' awareness, understanding, use and rating of National Training Organisation (NTO) services. A key factor in the future success of all NTOs will be how well employers know about and use them. Therefore it was important to assemble evidence about the level of employers' engagement with NTOs. This report is intentionally descriptive and factual and aims to summarise the key findings for a wider audience.

National Training Organisations were launched in May 1998 by The Secretary of State to be "unique organisations – owned and driven by employers and recognised by Government."[2] At the time of this survey there were 70 recognised NTOs including a number of "all sector" NTOs that represent all businesses. At the same time of this survey, NTOs were creating a Skills Foresight in order to be authoritative about the anticipated future skills and training needs and demands of the industries they represent.

Previous Surveys of Employers

The 1998 Skill Needs in Britain Survey (SNIB) included a question, which asked its sample of 4,000 employers whether they had heard of National Training Organisations or Industry Training Organisations. 42% confirmed they had. Of these aware employers, 16% had made contact with their NTO/ITO in the previous 12 months – a figure which was nearly half as low as the 1997 Skills Needs in Britain Survey had recorded. The most common reason for contacting an ITO / NTO was to learn about sources of education and training (7%) and to obtain advice about NVQs (7%).

The Skills Needs in Britain Survey provided the Department with useful contextual data when preparing for this 1999 Survey of Employers' Views of NTOs, but important changes in research methodology and sampling would be needed to provide a "truer", more representative level of awareness and usage by businesses. As such, whilst SNIB was a GB-wide survey of a sample of 4,000 from the 150,000 employers with over 25 employees, this survey is a UK-wide sample of 3,507 employers of all sizes including businesses employing less than 25 employees. As such, the sample for the 1999 Survey has been devised in such a way to be representative of the 3.7million businesses in the UK.

The results of the two surveys are therefore limited in terms of the extent to which data can be compared. Furthermore, SNIB did not seek to qualify awareness, nor probe for interviewees' understanding of the role of NTOs in the same way as this survey.

Chapter Two of the report provides a detailed description of the methodology for the survey and the approach taken for the fieldwork, which was conducted by telephone between 20 September and 29 October 1999. The next few paragraphs summarise some key points relating to method that should be useful context for the reader.

Sample Design

The sample frame was designed so as to be representative of all UK businesses, of which there are an estimated 3.7 million. The universe of businesses was established using two key sources, namely the DTI's SME Statistics Unit Report and the Inter Departmental Business Register

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[2] Foreword by David Blunkett, NTO Prospectus 1999-200

(IDBR)[3]. Their suitability and the particular issues associated with designing the sample frame using these sources are detailed in Chapter Two of this report.

A preferred sample of 3,500 businesses was agreed with the Steering Group. This sample was designed in order to over-sample larger establishments (businesses employing more than 50 people), and yet still be as inclusive as possible with regards to interviewing smaller businesses. Whilst previous employers survey such as SNIB had not included interviews with businesses employing less than 25 people, this survey did. The sample was also stratified by the Standard Industry Classification (SIC), which we shall refer to as "industry" throughout the report. Further detailed explanation of the sampling approach is provided in the methodology section of this report (Chapter Two).

Choosing the Database of Businesses for the Survey

BT Business Pages provided the project with business contact details, extracted from their extensive database, which contains 1.7 million contact addresses and telephone numbers. This is a coverage of approximately 46% of all UK business establishments and is the largest single independent source for business contact details. The decision to purchase a database of 10,500 contacts from BT Business Pages was driven by two factors. Firstly, as the largest database of its kind in the UK it would be the most reliable database from which it would be more likely to obtain details for local offices, and not just business' headquarters. Secondly, there was the assumption that roughly one in three employers telephoned would participate in the survey.

Interpreting the Data

The reader will see the results of the survey presented in numerous tables within this report. All the percentages (unless stated otherwise) have been **weighted** to be representative of all UK business establishments. We achieve this by taking the actual number of interviews completed in the survey, and carrying out calculations that ensure it is proportionally representative of the UK's distribution of businesses.

Example:

For illustrative purposes, if we had completed 350 interviews with construction firms from our achieved sample of 3,500 interviews (10%), but in real terms construction accounts for 20% of all UK businesses we would carry out a "weighting calculation". This calculation allows the value of those 350 responses to be increased by two times in order to bring it in line with the actual distribution of construction firms in the UK. This principle is applied throughout the study in order that we can be more confident that the data is representative of the UK business population.

1.2 Aims and objectives of the survey

The main aims of the project were to provide:

(i) baseline data on the percentage of employers who are aware of NTOs, understand the purpose of NTOs, use their services and are satisfied with the services used. This data will be presented by employer size, sector and region.

(ii) data in SPSS version 9 format which can be used by the Department for in-house analysis.

(iii) a basic report based on the data, which can be published in the Department's Research Report series, along with an Executive Summary.

[3] The IDBR provided us with universe data for public sector organisations, not including in DTI statistics.

(iv) a set of tried and tested questions that can be repeated in future years to monitor employers engagement with NTOs.

1.3 Reporting Conventions

Terms and their meaning

Unprompted awareness: This is explained at length in the methodology section of the report. It is the term used to describe any situation where an employer interviewed actually mentions the words National Training Organisation, Industry Training Organisation or the abbreviations NTO or ITO without such words being used by the interviewer prior to his or her response. Also, if the employer actually named his or her respective NTO / ITO without being prompted the employer is deemed to have demonstrated “unprompted awareness”.

Prompted awareness: This again is explained at length in the methodology section of the report. It is the term used to describe any situation where an employer interviewed has said that he or she has heard of the words National Training Organisation or Industry Training Organisation, or the abbreviations NTO or ITO when asked by the interviewer. Also, if the employer has heard of their named NTO / ITO, the employer is deemed to have demonstrated “prompted awareness”.

Unweighted data: This is a statistical term, which simply describes the real number of interviews that have been completed and the results arising. It means that the data has not been altered in anyway, and is therefore not reliably representative of the UK business population.

Weighted data: This is a statistical terms which means that data has been in some way altered to be representative of the UK business population. Weighted data is in fact the most reliable data upon which to interpret the results of our survey since each actual survey has been “weighted” to be more representative of the UK business population. Unless otherwise stated, all data presented in this report is weighted.

As an additional note relating to statistical conventions, if the number of responses to a question was greater than 1500, percentages are presented to one decimal place. If the number of responses to a question was less than 1500, all percentages have been rounded up to whole numbers. When the base number of responses has been less than 100 in later sections of the report, percentages are not used at all. The actual number of responses has been stated instead.

Names, abbreviations and acronyms

IDBR stands for the Inter Departmental Business Register which is a source of statistical information that provides an overview of the number of UK businesses operating PAYE or that are VAT registered.

DTI stands for the Department of Trade and Industry

SME stands for small to medium sized enterprise typically any business employing between 25 and 250 employees.

The Department for Education and Employment is referred to as either DfEE or The Department.

IiP stands for Investors in People, a national standard of good practice for a company’s investment in workforce development and training

SIC stands for Standard Industrial Classification

SOC stands for Standard Occupational Classification

This survey is based upon over 3,500 interviews with businesses from all sectors of the UK. The term sector will usually be referred to as industry throughout the report.

How industries have been classified for the purposes of this report.

We have considered both the SIC92 codes, and the DTI's SME Statistic Unit's sectoral codes to arrive at a fair description of industries that have participated in this survey. As such, the convention will be based upon the descriptions provided in the shaded column within the following table. The first two columns are provided as reference for the reader only.

UK SIC (92) Summary Structure		DTi SME Statistics Unit		Employer Awareness of NTOs Survey (QA Report title)	
A	Agriculture, hunting and forestry	A, B	Agriculture, forestry and fishing	A, B, C & E	**Primary sector**
B	Fishing				
C	Mining and quarrying	C	Mining and quarrying		
D	Manufacturing	D	Manufacturing	D	**Manufacturing**
E	Electricity, gas and water supply	E	Electricity, gas and water supply		
F	Construction	F	Construction	F	**Construction**
G	Wholesale and retail trade,; repair of motor vehicles, motorcycles and personal and household goods	G	Wholesale, retail and repairs	G	**Whole-sale/ retail/**
H	Hotels and restaurants	H	Hotels and restaurants	H	**Hotels/**
I	Transport, storage and communication	I	Transport, storage, communication	I	**Transport/ storage**
J	Financial intermediation	J	Financial intermediation	J	**Finance**
K	Real estate, renting and business activities	K	Real estate, business activities	K	**Real estate/ renting**
L	Public administration and defence, compulsory social security			L, M, N & O	**Educ/ Health/ Social***
M	Education	M	Education		
N	Health and social work	N	Health and social work		
O	Other community, social and personal service activities	O	Other social / personal services		

Tables

Sometimes the reader will see the letter "**N"** within a table heading. This simply refers to the sample of actual interviews achieved in the survey and is therefore presenting unweighted data. All tables in the main report from Chapter Three onwards are based on weighted data to be representative of UK employers by size and sector. Each table should include where appropriate:

- A title, which is referenced in the Index of Tables in the appendices
- The question within the employer survey to which the table relates
- Whether results represented prompted or unprompted response by interviewees
- The base number of employers answering the question presented in the table
- The overall base for the survey, which is 3,507.
- Sources used (for sampling frame tables in Chapter Two)

Chapter 2: Methodology

This chapter provides information on survey methodology, sample frame design, distribution of achieved sample, weighting, sources of information used to inform the research, questionnaire development, questions to establish level of awareness of NTOs and a profile of respondents. It also comments on the role of the Steering Group and the pilot exercise undertaken before fieldwork commenced.

2.1 Background

This survey of employers is one of a number of projects commissioned by the Department to investigate the effectiveness of NTOs in delivering their strategies and in evaluating their progress towards meeting overall objectives agreed with Government. One such study is the Evaluation of the NTO Network, a longitudinal study started in 1997 being completed by GHK Economics and Management. It is accepted that without significant levels of awareness employers will not access the services, advice and information that NTOs are responsible for and can offer. This survey should complement GHK's more widely embracing evaluation of NTOs.

This survey is the first and **only dedicated piece of research** to be commissioned by the Department, which looks specifically at NTO employer awareness, understanding and usage. The 1998 Skills Needs in Britain Survey had scratched the surface and suggested that 42% of employers with more than 25 employees were aware of NTOs / ITOs. This study sought to build on this data considerably and provide an overview of awareness amongst micro, small, medium and large employers in England, Wales, Scotland and Northern Ireland.

In effect, this study is seen to be a baseline study of awareness and usage of NTOs by employers, the results of which will be used to inform progress by NTOs when future evaluations are undertaken. With any baseline study, it is essential to get the core questioning fit for purpose and phrased in such a fashion that the questions are sustainable despite change anticipated within the NTO network itself.

To this end the Department established a Steering Group comprising representatives from DfEE's Analytical Services and NTO Division and NTO National Council. This Group provided ongoing support, guidance and feedback to Questions Answered throughout the process of questionnaire development and piloting and took pains to consult with others about the effectiveness of the survey to be administered.

As a matter of record, Questions Answered attended two steering group sessions before the final questionnaire was agreed. Drafts of the questionnaire were refined with each meeting until at last it was in a fit state for piloting with a small sample of employers.

2.2 The Pilot

The objectives of the pilot research were:

To complete 100 random employer telephone interviews using a sample frame stratified by sector and sizeband (a mini-version of the real frame).

To test the effectiveness of the questionnaire and recommend suitable changes.

To inform the Steering Group as to likely levels and type of employer awareness so that any implications for the overall project can be considered before the fieldwork went live in September 1999.

The pilot turned out to be a crucial exercise informing the Steering Group as to what did and did not work in practice. The main findings of the pilot were as follows.

"Trigger" words to describe NTOs key function

Unprompted awareness of NTOs was established by asking who an employer would contact (a) locally (b) regionally and (c) nationally for anything to do with training, skills or recruitment for their type of business. The word that seemed to skew employers' responses was recruitment and we found many employers responding that they would contact a job centre, an FE College or a recruitment agency. The Steering Group decided to change the wording of this question omitting recruitment as a key term to define the activities of NTOs. In the pilot, unprompted awareness of NTOs was zero.

The need to offer different questions to establish awareness

Employers could demonstrate awareness in different ways. For example, some said they had heard of NTOs but had not heard of their own actual NTO. Others had not heard of NTOs or their named NTOs but were aware of what NTOs used to be namely ITOs (Industry Training Organisations) or Lead Bodies. The Steering Group therefore decided that it was worthwhile to offer employers a number of opportunities to demonstrate awareness of either the brands – NTOs, ITOs, Lead Bodies – or the current NTOs which would represent the employer being interviewed. In the results of the study we see that if this approach had not been taken the aggregated baseline awareness would have been significantly lower, and a true picture would not necessarily have been produced.

How we pre-determined an employer's NTO / ITO

This particular decision to offer options for demonstrating awareness required Questions Answered to pre-determine for every single employer the likely NTO which represented him / her. In practice, this meant two things; firstly, there was a need to review some work undertaken by Pye-Tait for the Department, which sought to provide the SICs[4] and SOCs[5] of NTOs. These were lifted from all NTOs' original NTO bid recognition document. Where gaps existed QA scoped each NTO as best it could also using SIC. Secondly, it was necessary to create fields within the database of 10,500 records purchased by QA from BT Business Pages for this study and attach this new data (named NTOs) to each record so that before any telephone interview was started the interviewer already knew which named NTOs to prompt.

Why it was necessary to include all businesses

33% of employers demonstrated awareness of either NTOs / ITOs with awareness levels higher amongst employers of 50 people or more. This fact confirmed the Group's desire to create a sampling frame for the Survey, which would ensure that a suitable proportion of employers were interviewed from five sizebands namely: 1-9 (including sole traders or zero sized establishments), 10-49, 50-199, 200-499 and 500+.

How to describe the role of NTOs

For those employers that demonstrated awareness further questions were asked which related to their understanding of the role of NTOs. The pilot determined that it was useful to obtain this understanding first in an unprompted fashion to see what employers would say; and secondly, by providing a series of prompted descriptions which could all feasibly have been the roles of NTOs. The main learning point from the pilot was that the prompted descriptions were too jargonistic. The

[4] SICs – Standard Industrial Classification codes
[5] SOCs – Standard Occupational Classification codes

descriptions were therefore made simpler to understand. Also, within the list of descriptions, two "red herrings" were included. This would allow us to look at any misperception there was about the role of NTOs.

Being sensitive to interviewees'

Whilst a number of the interviewees in the pilot did feel confident to say what they thought the role of NTOs to be, a significant proportion could not. As such, it was agreed by the Steering Group that the questionnaire would give employers the option to say "heard of NTOs but have no understanding of their role". In practice, this saved interviewees from any embarrassment they might feel when asked to describe NTOs. It also saved the interviewer asking many further questions that would have reaped no further beneficial information from that interviewee.

Educating businesses and offering further information about NTOs

In the pilot questionnaire, we asked interviewees who had demonstrated awareness what they felt to be the role of NTOs. After they had provided their own understanding of NTOs' role, the interviewer read out a statement that as accurately as possible described the "real" role of NTOs, as defined by the Steering Group. This allowed for the interviewee to be educated as part of the survey and would clear up any misperceptions that the interviewee might have about NTOs. These people were also asked during the survey whether they would welcome further information about NTOs. The pilot proved this approach worthwhile, and it was felt that all interviewees (not just those demonstrating awareness) ought to be given the opportunity to have NTOs' role explained, and to have the offer of further information. This was agreed and changed within the final questionnaire. As a point of interest, over 2,000 interviewees requested information about NTOs as a result of this initiative.

Questions that did not work so well and new questions that were included

The pilot provided an excellent opportunity to try out questions and see whether they worked in practice. One question that did not work so well, subsequently dropped, sought to obtain employers' extent of agreement with a number of statements such as: "NTOs are in touch with the needs of businesses in its sector" or "NTOs represent businesses of all sizes in its sector" or "NTOs represent businesses in their sector effectively at national level." Conversely, having presented the results of the 100 pilot surveys, new questions were considered. One example was to ask interviewees how likely they were to contact their NTO in the next 12 months that might ultimately provide some forecasting data for The Department.

2.3 Consultation with the NTOs

In parallel with the piloting exercise, the Steering Group collaborated with Questions Answered to raise awareness of this survey amongst the Chief Executives and Research Managers of the 70 recognised NTOs. This would allow for a more widespread consideration of the survey, its aims and the proposed method for collecting data from employers by not only the Department, but also the NTOs whom the report would ultimately effect.

A range of information was sent throughout the project. Firstly, a letter was sent to all Chief Executives by Questions Answered to provide an overview of the study and why the Department was commissioning the research[6]. QA then followed this mail-out with a phone round of all Chief Executives willing to make comment about the study. Over 40 provided feedback on the survey's approach and oftentimes the Chief Executive had referred the correspondence to their Research Manager, who in due course made specific technical comments about sampling and the reliability of the findings.

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[6] A copy of this letter can be found in the annex of this report

The kind of correspondence and feedback we obtained from Chief Executives from this additional exercise is illustrated from a number of selected quotations below:

“It will be quiet difficult to get employers in our sector to respond because 70% will be SMEs.”

“Having just completed our own extensive labour market studies with employers, will there not be research fatigue?”

“I think it’s a good initiative and would support DfEE and Questions Answered disseminating the findings of the study through the Research Network.”

“I’m heartened by your approach to test for awareness not only of the NTO brand, but also awareness of ITOs and Lead Bodies. I don’t think some of the newer NTO brand names will have established themselves yet.”

“We expect that awareness will be low currently, although our plans to more actively promote ourselves through website development will hopefully raise awareness over time.”

QA’s activity was complemented by NTO National Council’s kind offer to include reference to the survey in their Friday mailings to all NTO Chief Executives. And even more innovatively, once a draft questionnaire had been agreed by the Steering Group (prior to pilot) the survey itself was actually posted up on the Members’ Only pages of the NTONC website inviting comment and feedback. In many ways, this 1999 Survey was founded upon a sound consultative process, which greatly improved the original aims and expectation for the study.

As the study progressed a number of NTOs took it upon themselves to keep informed about the survey, and a small number even provided results of similar surveys they had undertaken themselves. When the fieldwork was completed, draft headline results were disseminated to NTOs and again over 10 were eager to talk these through with either QA or the Department.

2.4 Sources used for Sampling

Since this survey needed to be representative of all businesses in the United Kingdom, it was clear from the outset that no single source of statistics would provide an adequate universe upon which to solely base the sample design. It was necessary to use two key sources to provide a more robust sampling frame design. These sources were:

The **IDBR** or Inter Departmental Business Register. This is a list of UK businesses maintained by the Office for National Statistics (ONS) and combines the former Central Statistical Office (CSO) VAT based business register and the former Employment Department (ED) statistics system. It includes businesses from all parts of the economy, but misses some very small businesses (self-employed and those without employees and low turnover) and some non-profit making organisations. There are around 3.7 million businesses in the UK of which 2 million are on the IDBR. The IDBR provides more than 98% coverage of economic activity, which was the key strength that attracted this study to the IDBR data.

However, its limitations were also of crucial importance to this Survey, since NTOs are not just there to serve larger firms or just those with employees or with a certain turnover (VAT registered). NTOs are inclusive organisations, there to represent their industries and businesses of all sizes across the United Kingdom. The best source it seemed for providing comprehensive data in this respect was The DTI's SME statistics report (August 1999). As the report notes in its own technical appendices:

"No single source is able to estimate the total number of businesses in the UK. The IDBR holds a record of around 2 million businesses, but its coverage is known to be incomplete amongst the very smallest businesses. Therefore these SME statistics include an estimate of the number of unregistered businesses, their employment and turnover."

Further technical notes within the DTI's SME Statistics Report explain how numerous sources of information including the IDBR, ONS Surveys, PAYE data, Customs and Excise data and the Labour Force Survey (LFS) have been brought together to provide the best estimates of total UK businesses including sole traders and non-registered businesses. Nevertheless, in its opening commentary, the Report is keen to point out that the smallest class of business, which contains an estimate of the number of businesses with no employees, is the greatest potential source of error. This is due both to assumptions necessary in estimating businesses that do not appear on the official register, and to sampling error within the self-employment data on which zero class estimates are based.

One source could not be used without the other. In defining the final sampling frame, QA agreed with the Steering Group and DfEE's Analytical Services to base the frame on the DTI SME Statistics Report universe of 3.66 million businesses. But since no estimates for public administration, defence and compulsory social security are included in the DTI Report, data for the universe of "public sector" organisations as defined were extracted from the IDBR and added to the final universe used for this study. Whilst in practice, there may be overlap in this approach, it was deemed important to include public sector organisations. All things considered, this approach appeared to be the best way in which to integrate the DTI and IDBR sources based on their relative strengths and weaknesses. As such, this study is based upon a universe of nearly 3.7 million businesses.

2.5 Sampling

Interviews with local offices and headquarters

This survey sought to provide a robust and reliable sampling frame that could be regarded as representative of the UK's 3.7 million businesses including zero-sized establishments and micro businesses. As described in Chapter One, BT Business Pages holds the single largest independent UK business database of its kind in the UK. It was anticipated therefore that by using this source we would be more likely to reach local offices as well as company headquarters. This is an important methodological point, since NTOs are not just there for headquarters – they are there to serve businesses of all sizes, structure and location.

To determine the universe of employers in the United Kingdom two sources were used as described in 2.4. These two sources were merged as far as possible in order to determine the proportions of employers in the UK by sizeband and sector. Region or location of businesses was seen as the least important of the three possible variables to be used for the sampling frame. It was accepted that by ordering a random sample of contacts from BT Business Pages it was likely that a robust and representative geographical spread of interviews would ultimately be achieved.

This was a tried and tested sampling method used in other surveys commissioned by The Department. As the results to this survey shows (please refer to Tables 5 and 6), the final achieved distribution of the sample was indeed a close match to the actual distribution of businesses in the UK both by region and by country. In fact, the distribution of the final sample by country almost precisely matched the overall proportion of businesses in England, Scotland, Wales and Northern Ireland. In effect this provides more reliability to the data when commenting on trends by country.

Table 1a: The distribution of employers in the United Kingdom by size and sector

1992 SIC Section	Sector description	1-9	10-49	50-199	200-499	500+	Totals
A,B,C & E	Agriculture, Fishing, Mining & Quarrying & Utilities	194,475	3,750	285	50	75	198,635
D	Manufacturing	288,970	32,040	7,900	2,070	1,150	332,130
F	Construction	715,930	11,290	1,160	200	130	728,710
G	Wholesale & Retail	512,750	35,755	4,050	675	485	553,715
H	Hotels	135,715	15,905	1,375	190	130	153,315
I	Transport	202,195	7,320	1,100	240	215	211,070
J	Finance	62,135	2,780	605	190	225	65,935
K	Real Estate	707,675	24,610	3,475	720	440	736,920
L	Public Sector	14,475	13,815	4,740	1,125	360	34,515
M,N & O	Education, Health & social work & other community services	646,680	26,645	3,130	390	590	677,435
Total		3,481,000	173,910	27,820	5,850	3,800	3,692,380
Proportion of all UK businesses		**94.28%**	**4.71%**	**0.75%**	**0.16%**	**0.10%**	**100%**

Sources used: DTI SME Statistics Unit Report, August 1999 and Inter Departmental Business Register (for public sector statistics).

From the universe of all UK businesses, a number of sampling frames were designed and proposed to the Department. The key determinants of the final frame designed were:

- The requirement to over sample medium and larger establishments across all industry sectors
- The desire to provide adequately reliable, yet proportionally lower samples of small and micro employers
- The margins or error encountered with each sample by sizeband
- The weighting calculations that would be needed to make this sample truly representative of UK employers by sizeband and industry

Table 1b shows the weighting profile used to weight the survey data and Table 2 illustrates the final agreed sample frame for the survey.

Table 1b: Weighting population profile

1992 SIC Section	Sector description	1-9 %	10-49 %	50-199 %	200-499 %	500+ %	Totals %
A,B,C & E	Agriculture, Fishing, Mining & Quarrying & Utilities	5.27	0.10	0.01	0.00	0.00	5.38
D	Manufacturing	7.83	0.87	0.21	0.06	0.03	9.00
F	Construction	19.39	0.31	0.03	0.01	0.00	19.74
G	Wholesale & Retail	13.89	0.97	0.11	0.02	0.01	15.00
H	Hotels	3.68	0.43	0.04	0.01	0.00	4.15
I	Transport	5.48	0.20	0.03	0.01	0.01	5.72
J	Finance	1.6	0.08	0.02	0.01	0.01	1.79
K	Real Estate	19.17	0.67	0.09	0.02	0.01	19.96
L	Public Sector	0.39	0.37	0.13	0.03	0.01	0.93

M,N & O	Education, Health & social work & other community services	17.51	0.72	0.08	0.01	0.02	18.35
Total UK		**94.28%**	**4.71%**	**0.75%**	**0.16%**	**0.10%**	**100%**

Table 2: Agreed sampling frame for the Employer Survey

1992 SIC Section	Sector description	1-9	10-49	50-199	200-499	500+	Totals
A,B,C & E	Agriculture, Fishing, Mining & Quarrying & Utilities	67	29	8	3	4	110
D	Manufacturing	100	245	227	119	55	745
F	Construction	247	86	33	11	6	384
G	Wholesale & Retail	177	274	116	39	23	629
H	Hotels	47	122	39	11	6	225
I	Transport	70	56	32	14	10	181
J	Finance	21	21	17	11	11	82
K	Real Estate	244	188	100	41	21	594
L, M,N & O	Education, Health & social work & other community services including public sector	223	204	90	22	28	567
Total		1,196	1,225	662	271	164	3,517
% of sample		**34.01%**	**34.83%**	**18.82%**	**7.71%**	**4.66%**	**100%**

Sources used: DTI SME Statistics Unit, August 1999 and Inter Departmental Business Register

The survey of employers was completed entirely by telephone research, conducted over a 6-week period between 20th September and 29th October 1999. The following tables provide an overview of the distribution of the final sample by size, sector, region and country.

Table 3: Size distribution of the final sample

Number of employees	Unweighted N	%	Weighted N	%
1-9	1,104	32	3,481,000	94.28
10-49	1,237	35	173,910	4.71
50-199	694	20	27,820	0.75
200-499	296	8	5,850	0.16
500+	176	5	3,800	0.10
Total	**3,507**		**3,692,380**	**100**

The sample achieved corresponds to the sample frame designed for the project with the largest proportion of interviews being completed with employers within the 10-49 sizeband. Nearly a third of all interviews were completed with smaller businesses employing 9 people or less.

Table 4: Sector distribution of the final sample

1992 SIC Section	Industry Sector	Unweighted N	%	Weighted N	%
A,B,C & E	Primary	71	2	198,635	5
D	Manufacturing	760	22	332,130	9

F	Construction	309	9	728,710	20
G	Wholesale & Retail	664	19	553,715	15
H	Hotels	245	7	153,315	4
I	Transport	194	6	211,070	6
J	Finance	82	2	65,935	2
K	Real Estate	578	16	736,920	20
L, M,N & O	Education, Social & Health	604	17	711,950	19
Total		**3,507**	**100**	**3,692,380**	**100**

Sectoral distribution was always intended to be close to the actual distribution of employers by sector in the UK, and the final sample achieved this aim, with one exception. A larger proportion of manufacturing employers were sampled than anticipated, whilst conversely a lower proportion of construction employers were interviewed. There was a significant amount of resistance to interview participation from this latter sector. As such, we have applied weighting to all data in order to make the achieved sample representative by sector as well as size. When one considers that as a sector, manufacturing actually provides employment for nearly three times as many people as construction in the UK, the final achieved sample is likely to be more representative than intended by employment than simply by sector.

Regional distribution

As agreed with the Steering Group at the outset, data was never intended to be weighted by region, but we think as a matter of record it is useful to establish what regional spread of interviews was achieved. As can be interpreted from the table below, the regional distribution of the sample has unwittingly been remarkably close to the actual UK regional distribution of employers. The only particular exceptions to this are London and the East of England where the sample distribution was proportionally lower than actual distribution in the UK. Conversely, there was an over-sampling of employers in the South East compared to the actual universe of UK employers.

Table 5: Regional distribution of the final sample

Region	Unweighted N	% of sample	UK Universe %	Variance
North East	124	3.5	2.7	0.8
North West	372	10.6	8.2	2.4
Merseyside	79	2.3	1.6	0.7
Yorkshire & the Humber	281	8.0	7.4	0.6
East Midlands	238	6.8	6.3	0.5
West Midlands	346	9.9	7.8	2.1
East of England	159	4.5	10.3	-5.8
London	358	10.2	15.5	-5.3
South East	792	22.6	16.8	5.8
South West	292	8.3	10.1	-1.8
Wales	127	3.6	4.2	-0.6
Scotland	255	7.3	6.8	0.5
Northern Ireland	84	2.4	2.3	0.1
	3,507	**100**	**3,692,380**	**-**

The distribution by country was extremely close to the actual distribution of employment in the UK as can be seen in Table 6.

Table 6: Distribution by Country

Country	Unweighted N	% of sample	UK Universe %	Variance
England	3041	86.7	86.7	0
Wales	127	3.6	4.2	-0.6
Scotland	255	7.3	6.8	0.5
Northern Ireland	84	2.4	2.3	0.1
	3,507	**100**	**3,692,380**	**-**

Tables 7 and 8 provide an overview of the distribution of the sample by the variables of site and Investors in People Status.

Table 7: Distribution by type of site

Country	Unweighted N	%	Weighted N	%
Headquarters	2,241	63.9	2,663	75.9
Other	1,266	36.1	844	24.1
	3,507	**100**	**3,507**	**100**

The majority of interviews were with Headquarters, however, a quarter (weighted) were with other offices.

Table 8: Distribution by IiP Status

Country	Unweighted N	%	Weighted N	%
Recognised for IiP	668	19.0	202	5.8
Committed to IiP	373	10.6	135	3.9
Neither recognised nor committed to IiP	2,466	70.4	3,170	90.3
	3,507	**100**	**3,507**	**100**

2.6 Reliability of the Results

We can be statistically confident that the characteristics of the sample will approximate the overall business structure in the UK. However, care will need to be taken when interpreting findings for each region and sector. The sample provides a 95% confidence interval with 1.7% margin of error. The error increases as the size of any sub group of businesses within the sample under examination declines.

2.7 NTO scoping

Questions Answered attempted to scope all businesses supplied on the BT database (10,500 records) using work undertaken on behalf of the Department by Pye-Tait. SIC codes were primarily used to scope each record, but this process was complicated by two facts. Firstly, any one business may in fact be represented by more than one National Training Organisation. Secondly, all businesses are represented, in theory, by each of the all-sector NTOs within the network. Whilst

QA has sought to pre-determine every single interviewees’ NTOs / ITOs representing them there is still the possibility of error in the absence of a totally robust SIC and SOC-scoped structure per NTO.

2.8 Other key issues regarding the methodology

Who was interviewed?

It was anticipated from previous experience of other similar employer surveys that we needed to be flexible about who we interviewed. Specifically, smaller employers tend not to have personnel or Human Resource sections. For employers with less than 50 employees (pre-determined on the database bought in from BT Business Pages, but checked as part of the interview), interviewers asked to speak to the owner / manager or person most responsible for staffing and training at the site / location being telephoned. For companies with 50 or more employees interviewers asked to be put through to the human resource / personnel manager or person most responsible for staffing and training at the site being telephoned.

It is worth highlighting, however, that despite these controls, respondents to the survey will have varied, and in some instances may not have heard of or be aware of NTOs, whilst others in the firm, if asked, might have been aware. There is no way of quantifying this unknown possibility.

Local Offices and Headquarters

The sites contacted included headquarters and other sites in order that the survey could be as inclusive as possible and not skewed towards just towards the larger sites – whom, the Group suspected were more likely to have a greater level of awareness than the other, local sites.

How the survey was introduced?

Once the correct person had been identified, the interviewer would give the following standard introduction being careful not to mention NTOs or the words national training organisations anywhere, which would otherwise have defeated the initial objective of testing unprompted awareness:

> Good morning/afternoon, my name is............ and I am calling from Questions Answered Ltd. We are conducting a major study for the Department for Education and Employment about **training and skills** and how your type of business sector is represented in this respect. The results of every survey will be used to help develop policies at both a national and regional level. Participation is entirely voluntary and no responses will be attributed to any individual or company. Results will be reported to the Department for Education and Employment on an aggregated basis only. The interview will take between 5 and 15 minutes. Would you like to participate in the survey?

How were the awareness questions asked?

Having established the most suitable person for interview the first few questions of the survey sought to establish entirely **unprompted** awareness of NTOs by asking:

Q1.1 If you want information about anything to do with training and skills for your type of business **LOCALLY** who would you contact?

Q1.2 If you want information about anything to do training and skills for your type of business **REGIONALLY** who would you contact?

Q1.3 If you want information about anything to do training and skills for your type of business **NATIONALLY** who would you contact?

Q1.4 What organisations in your **sector** or **industry** provide advice on **training** and **skills** (other than any mentioned already)?

Write in:……………………………………………………………………………

Any interviewee who said the words National Training Organisation or Industry Training Organisation in response to questions 1.1 through to 1.4 was deemed as having unprompted awareness. This is a fair interpretation, since the interviewee has simply reacted to some key words including: “training”, “skills”, “local”, “regional” and “national”. Furthermore, if an interviewee provided the correct name of either their NTO or previously called ITO or Lead Body as their response to question 1.4 they were deemed to have demonstrated unprompted awareness of National Training Organisations. This collection of responses is analysed in depth in Chapter 3 of this report.

Logically, any employer who demonstrated unprompted awareness did not have to be asked questions, which prompted them for awareness of National Training Organisations. The remainder, or those who had not shown unprompted awareness, were asked the next series of questions 2.1 through to 2.4 described next.

Prompted awareness questions

Q2.1 Have you heard of National Training Organisations or NTOs?

Yes	1	CONTINUE
No	2	CONTINUE

This question was used in the 1998 Skills Needs in Britain Survey and is seen to be the most direct and reliable question within this 1999 employer survey to report on awareness of the NTO brand. Regardless of whether an employer had heard of NTOs, they were all asked the next question which gave them opportunity to show awareness of their named NTO ready out by the interviewer.

Q2.2 Have you heard of your industry’s National Training Organisation?

Example: Have you heard of the Hospitality Training Foundation?

Yes	1	SKIP TO 3.1 (SECTION DEALING WITH UNDERSTANDING OF NTOS)
No	2	CONTINUE

ASK NEXT QUESTION 2.3 ONLY IF THE RESPONDENT HAS NOT HEARD OF NTOs at 2.1 or 2.2

As results will show later in this report, some employers had heard of NTOs but not their own NTO. Conversely, some had heard of their own NTO but not the NTO brand. This is explained by the fact that not all recognised NTOs actually have “NTOs” within their recognised organisational title, for example CITB (Construction Industry Training Board) is the NTO for construction companies.

For those employers who had not heard of the NTO brand, nor their named NTO, the following question 2.3 allowed them to show awareness of the ITO brand established over many years prior to 1998.

Q2.3 Have you heard of Industry Training Organisations (ITOs) or Lead Bodies (LBs)?

Yes	1	CONTINUE
No	2	CONTINUE

Finally, regardless of whether an employer had shown awareness of the ITO brand they were asked whether they had heard of their named ITO read out by the interviewer.

Q2.4 Have you heard of your industry’s ITO / LB ?

Example: Have you heard of the Hotel and Catering Training Company?

Yes	1	CONTINUE
No	2	CONTINUE

In effect, this cascaded approach of questioning allowed the interviewee a number of opportunities to demonstrate awareness of:

NTOs as a brand – “Have you heard of National Training Organisations or NTOs?”

Their actual NTO – “Have you heard of “your own (named) NTO?

ITOs as a brand – “Have you heard of Industry Training Organisations or ITOs?”

Their actual “previous” ITO – “Have you heard of your own (named) ITO?”

The Steering Group provided guidance to QA on this matter, and agreed that it was worth establishing to what extent the new NTOs were still perceived or known as their predecessor organisation – oftentimes an ITO, Lead Body or Occupational Standards Council. As such, when we have analysed the data it has been possible to build up a more sophisticated profile or awareness levels by **type** of awareness, as much as by **volume** of awareness.

The next chapter begins to present the key findings of the survey.

Chapter 3: Unprompted Awareness of NTOs

Introduction

Having identified the correct person within a business establishment for interview the telephone survey was commenced. The starting point for all surveys was to establish the level of **unprompted** awareness that employers might have of National Training Organisations. As such, the introductory script read out by the interviewer made no mention of these particular words.

The first three questions, which all 3,507 interviewees were asked, sought to provide an adequate description of the key words and functions that you would expect to be associated with the role or perception of National Training Organisations. These key words were **training** and **skills**.

The first three questions of the survey were as follows.

Q1.1 If you want information about anything to do with training and skills for your type of business **LOCALLY** who would you contact?

Q1.2 If you want information about anything to do training and skills for your type of business **REGIONALLY** who would you contact?

Q1.3 If you want information about anything to do training and skills for your type of business **NATIONALLY** who would you contact?

Each of these questions was asked without any prompts from the interviewer. Whatever organisations the employer mentioned were recorded in a pre-coded menu of likely responses ranging from Training and Enterprise Councils and Job Centres through to local authorities, private training providers, trade associations and naturally, National Training Organisations and Industry Training Organisations. A total of 19 types of organisation were pre-coded, and anything not included in the menu was recorded as “other” and coded up as part of the analysis for this report. The results of this question are presented in Table 3.1 and the reader should note that the data has been weighted to be representative of the UK business population.

Just to be absolutely clear, the interviewee was deemed to have shown unprompted awareness of National Training Organisations if he or she mentioned any of the following words or abbreviations in their response to any of questions 1.1 to 1.3 when asked who they would contact (locally, regionally or nationally) for anything to do with training or skills for their type of business:

- National Training Organisation
- NTO
- Industry Training Organisation
- ITO
- Lead Body
- Occupational council

There is a possibility, however, that an employer may have been **aware** of National Training Organisations, but consciously decided not to say so because he / she would not “**contact**” an NTO about skills or training as phrased in the opening questions. This scenario might have occurred if say, for example, that employer had had a bad experience of contacting or using their NTOs’ service. There was no anecdotal evidence or interviewer feedback to suggest that this situation was actually taking place in the 1999 Survey.

Table 3.1a Unprompted identification of organisations to help with training and skills issues

Sector	Local	Rank	Regional	Rank	National	Rank
Unprompted Awareness	%	(local)	%	(regional)	%	(national)
In house / head office	22.7	1	10.8	1	10.1	1
FE College	17.3	2	2.8	5	1.5	6
Jobcentre	8.7	3	1.1	8	0.3	13
Training & Enterprise Council	7.5	4	2.3	6	0.6	8=
Private Training Company	6.1	5	2.9	4	2.3	4
Professional Body	5.2	6	4.3	2	4.9	2
Local Authority	4.4	7=	0.6	12	0.4	12
Higher Education Institution	4.4	7=	0.8	10	0.6	8=
National Training Organisation	**3.2**	**9**	**3.7**	**3**	**3.9**	**3**
Chamber of Commerce	3.0	10	0.4	13=	0.0	15=
Business link	2.8	11	0.4	13=	0.2	14
Trade Association	2.1	12	1.8	7	1.9	5
Industry Training Organisation	**1.7**	**13**	**0.7**	**11**	**0.6**	**8=**
Press / journals	1.4	14	0.9	9	1.1	7
Regional Development Agency	0.9	15	0.0	19	0.0	15=
Careers Service	0.8	16=	0.1	18	0.1	15=
Government Office	0.8	16=	0.3	15	0.5	11
Recruitment Agency	0.7	18	0.2	16=	0.0	15=
Group Training Association	0.5	19	0.2	16=	0.0	15=

Base: All employers 3,507
Data has been weighted to be representative of the total UK business population
Results relate to questions 1.1, 1.2 and 1.3 of the questionnaire (see Appendices)
The table presents data for unprompted awareness of NTOs / ITOs (shaded for the reader)

In-House

Clearly the interviewees always start “ at home” for getting information, that is to say their first port of call or contact to do with training or skills would be in-house staff or head office (where applicable). It is relatively safe to presume that this would be the first contact point however for any range of issues, not just training and skills.

Local Organisations

Locally, nearly one in five interviewees said they would contact their Further Education College for anything to do with training and skills and nearly one in ten would contact their local job centre. 3.2% of all 3,507 interviewees (weighted) would think to contact a National Training Organisation. This is interesting, because an NTO may not in fact have been physically local to those employers saying they would think of NTOs in this way. This is after all, perception that has been recorded.

Regional Organisations

Regionally, other than making in-house enquiries, nearly one in twenty employers would contact a professional body. Employers seemed to have fewer ideas about whom they might contact regionally for skills and training for their type of business, and interestingly more said they would contact an NTO regionally than they would think of contacting them locally. In fact 3.7% (weighted) of all 3,507 employers said they would contact an NTO for anything to do with skills or training. This set of employers includes the vast majority of respondents who also said they would contact an NTO locally though. Perceptions exist, it would seem that NTOs are accessible to be contacted locally or regionally, which for some areas of course is true as all NTOs do have a base or office in the UK. The largest concentration of these NTO offices is in and around London. Employers stating that they would contact NTOs locally or regionally, however, were located in many regions, particularly the South East (not London), the North West and the East Midlands.

National Organisations

Encouragingly, a greater proportion of employers said they would contact an NTO, without any prompting, than they would locally or regionally. In fact, 3.9% of all 3,507 employers stated they would contact an NTO for this type of issue. This response ranked third out of 19 rankings. In-house / head office would be the first starting point for one in ten employers (top ranking) whilst one in twenty employers would think of and contact a professional body (second ranking).

Looking at all those respondents who said the words "Industry Training Organisation" (and not including those who had already demonstrated their awareness by saying National Training Organisation) we found that an additional 0.7% (weighted) could be justly interpreted to have shown awareness of the concept of National Training Organisations.

As such, a total of 4.6% of employers had said unprompted that they would contact an NTO or ITO for anything to do with skills or training. These employers were asked no further questions in relation to awareness, and would go on instead to answer questions relating to their understanding of the role of NTOs.

However, there had still been the possibility that employers who really knew about NTOs or ITOs had not had chance to demonstrate their awareness simply because they did not tune in to the phrasing of the first few questions. As such, we then asked employers who had not already demonstrated their awareness of NTOs or ITOs in the initial questions:

Q1.4 What organisations in your sector or industry provide advice on training and skills (other than any mentioned already)?

Not including any employer who said he / she couldn't think of any particular organisation when asked this question, unprompted responses were obtained from 2,506 employers. Virtually all of these responses (97%) were names of specific associations, local organisations in relation to that employer, societies and / or industry federations. But amongst the organisations named was a very small proportion of NTOs and ITOs (3%), which produced **additional unprompted** awareness than had already been established in the first questions 1.1, 1.2 and 1.3 of the survey. Results were as follows.

Table 3.1b Unprompted awareness of NTOs by size of employer

Who provides advice on training and skills?	Unweighted		Weighted	
	No. of responses	%	No. of responses	%
NTO	52	2.1	51	**2.2**
ITO	30	1.2	17	**0.7**
Other	2,424	96.7	2,269	97.1
Total (base)	2,506	100	2,337	100

Base: Indicated in the table. Base for unweighted data is 2,506 employers making a response to question 1.4. Base for unweighted data is 2,337 employers making a response to this question "What organisations in your sector or industry provide advice on training and skills"
The table presents data for "additional" unprompted awareness of NTOs.

What Table 3.1b demonstrates is that the different way in which the questions relating to unprompted awareness of NTOs / ITOs were phrased have been significant for this survey. In fact, if question 1.4 had not been asked or created, we would not have picked up on the additional 2.2% of employers who did know about their NTO, nor would we have picked up on the additional 0.7% of employers who did know about their previous ITO.

When we analysed the results of all questions relating to unprompted awareness of NTOs / ITOs (1.1 through to 1.4) our conclusion was that:

- **257** of the 3,507 employers interviewed showed unprompted awareness **(unweighted)**

- **264** of the 3,507 employers interviewed showed unprompted awareness **(weighted)**

The true baseline for The Department to monitor over time is:

Baseline statistic for unprompted awareness:

7.5% of all employers demonstrated awareness of NTOs / ITOs without being prompted.

Weighted data, national survey of employers 199

To make this statistic useful to the NTO network and The Department we need to understand which type of employers were showing unprompted awareness of NTOs / ITOs and which were not. The following section therefore analyses the baseline statistic of unprompted awareness – 7.5% of all UK employers – by size, industry, region, type of site (HQ or local office) and Investors in people status. Where appropriate we have also been able to draw out awareness by actual NTO[7]

[7] Analysis by NTO has only been undertaken where samples have been deemed more reliable and robust. Please see technical annex for further guidance.

Unless otherwise stated, all data presented in the following tables have been weighted to be representative of the UK business population.

Table 3.2 Unprompted awareness of NTOs by size of employer

Size of employer	1-9	10-49	50-199	200-499	500+	All
	%	%	%	%	%	%
Unprompted awareness of NTOs	7.6	6.0	6.4	10.8	17.1	**7.5**

Base: All employers 3,507
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to questions 1.1, 1.2, 1.3 and 1.4 (see Appendices)
The table presents data for unprompted awareness of NTOs / ITOs

Table 3.2 shows unprompted awareness of NTOs by size (number of employees). The figures suggest that just over 17% of businesses employing more than 500 employees were aware of NTOs / ITOs without having to be given any information other than key words such as “skills” or “training”. Nearly 11% of businesses with 200-499 employees demonstrated similar unprompted awareness.

Surprisingly perhaps, is the finding that micro businesses with less than 10 employees demonstrated higher levels of unprompted awareness (7.6%) than businesses employing 10-49 employees (6.0) or even larger businesses employing 50-199 employees (6.4%).

Unprompted awareness of NTOs / ITOs by industry

Table 3.3 provides analysis of unprompted awareness of NTO / ITO by industry. It illustrates higher than average levels of unprompted awareness amongst three industry groupings: construction, manufacturing and the primary sector.

Table 3.3 Unprompted awareness of NTOs by industry

Industry	Primary sector	Manuf-acturing	Const-ruction	Whole-sale/ retail/	Hotels/	Trans-port/ storage	Finance	Real estate/ renting	Educ/ Health/ Social*	All sectors
	%	%	%	%	%	%	%	%	%	%
Unprompted Awareness	20.0	9.7	24.3	1.0%	0.2%	0.1	0%	2.9	0.2%	**7.5**

Base: All employers 3,507
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to questions 1.1, 1.2, 1.3 and 1.4 (see Appendices)
The table presents data for unprompted awareness of NTOs / ITOs

From employer responses, the only industry reporting significant unprompted awareness of NTOs /ITOs was “Construction” (24.3%). This comes of perhaps little surprise given the relatively long period of time that CITB (the NTO that represents the construction industry) has been established and the fact that a levy system operates within this sector.

The high construction industry response distorts the average level of unprompted awareness across all industries in the UK. In practice therefore, if we were to remove the construction responses, the “true” level of unprompted awareness in the UK (all industries) would be significantly reduced. One in five businesses in primary sector showed unprompted awareness of NTOs / ITOs. Just under 10% of businesses in the manufacturing sector also demonstrated unprompted awareness. All other industries, however, demonstrated less than average or negligible unprompted awareness of NTOs / ITOs.

Unprompted awareness of NTOs / ITOs by region

Table 3.4 provides unprompted awareness of NTOs / ITOs by region. The highest levels of unprompted awareness were recorded in the East of England (13.9%), in Wales (13.5%) and in Scotland (10.6%). Of the English regions, businesses interviewed in Merseyside (0.6%) and London (1.9%) showed the lowest levels of unprompted awareness of NTOs / ITOs.

Table 3.4 Unprompted awareness of NTOs / ITOs by region

Region	North East	North West	Mer sey-side	Yorks. & Humb	East Mids.	West Mids	East	London	South East	South West	Wales	Scotland	N. Ireland	All
	%	%	%	%	%	%	%	%	%	%	%	%	%	
Un-prompted **Aware-Ness**	3.4	7.1	0.6	8.0	12.1	2.8	13.9	1.9	9.1	4.4	**13.5**	**10.6**	**10.3**	**7.5**

Base: All employers 3,507
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to questions 1.1, 1.2, 1.3 and 1.4 (see Appendices)
The table presents data for unprompted awareness of NTOs / ITOs

Unprompted awareness of NTOs / ITOs by country

When we analysed unprompted awareness by country we found that businesses in Wales (13.5%) were most likely to have known about NTOs / ITOs and businesses in England (6.9%) were least likely to have known about NTOs / ITOs. Businesses in Scotland (10.6%) and Northern Ireland (10.3%) demonstrated very similar levels of unprompted awareness.

Table 3.5 Unprompted awareness of NTOs / ITOs by country

Country	England	Wales	Scotland	N. Ireland	All
	%	%	%	%	%
Unprompted awareness	**6.9**	**13.5**	**10.6**	**10.3**	**7.5**

Base: All employers 3,507
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to questions 1.1, 1.2, 1.3 and 1.4 (see Appendices)
The table presents data for unprompted awareness of NTOs / ITOs

Unprompted awareness of NTOs / ITOs by type of site

Our survey bears out the finding that headquarters of businesses are more likely to know about NTOs / ITOs than other sites such as local offices or even regional offices. Table 3.6 provides the results to justify this statement.

Table 3.6 Unprompted awareness of NTOs / ITOs by site

Site	Headquarters	Other Site	All
	%	%	%
Unprompted awareness	**9.5**	**1.3**	**7.5**

Base: All employers 3,507
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to questions 1.1, 1.2, 1.3 and 1.4 (see Appendices)
The table presents data for unprompted awareness of NTOs / ITOs

Unprompted awareness of NTOs / ITOs by IiP Status

Investors in People is a national standard to recognise companies that invest in the staff it employs and the way in which it conducts itself in relation to the training and development of its workforce through a shared vision and understanding of a company's objectives. 5.8% of our sample of interviews (weighted) were with companies who were recognised for IiP. We were interested to know whether these types of company would be more likely to know about NTOs / ITOs than non-recognised companies. Table 3.7 illustrates that in fact the opposite behaviour was found.

Table 3.7 Unprompted awareness by IiP status of businesses

Site	IiP recognised	Not recognised	All
	%	%	%
Unprompted awareness	**2.1**	**7.9**	**7.5**

Base: All employers 3,507
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to questions 1.1, 1.2, 1.3 and 1.4 (see Appendices)
The table presents data for unprompted awareness of NTOs / ITOs

Chapter 4: Prompted Awareness of NTOs

4.1 Introduction

The 1998 Skill Needs in Britain Survey had indicated that 42% of all employers with more than 25 employees in Great Britain had heard of National Training Organisations when asked that direct question. Whilst not strictly comparable to the data that follows, it does provide a context for the series of questions analysed in this chapter of the report which deal with the level of **prompted awareness** of NTOs by businesses.

It will describe the level of prompted awareness of the NTO “brand”, the respective industry NTO and, where employers were not aware of NTOs, their awareness of Industry Training Organisations, Lead Bodies or Occupational Councils.

Baseline Statistic

This chapter will describe in detail how the following baseline statistic for prompted awareness has been calculated. Please bear in mind, that this does not include the 7.5% of employers who had already demonstrated unprompted awareness (see Chapter Three).

Baseline statistic for prompted awareness:

30.1% of all employers demonstrated awareness of NTOs / ITOs when prompted.

Weighted data, national survey of employers 1999

For the reader’s reference, all data presented in this chapter is weighted to be representative of the UK business population unless otherwise stated.

4.2 Have you heard of National Training Organisations?

Of the 3,243 employers asked whether they had heard of National Training Organisations, a total of 19.8%[8] said they had, but 80.2% had not.

Table 4.1 Recognition and awareness of the NTO brand by size of employer

Size of employer	1-9	10-49	50-199	200-499	500+	All
	%	%	%	%	%	%
Have you heard of National Training Organisations?	19.5	23.6	30.0	36.9	41.7	**19.8**

Base: 3,243 employers asked question 2.1 “Have you heard of National Training Organisations”.
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to question 2.1, prompted awareness of National Training Organisations – the brand

The larger the employer, the more likely they are to have been aware of National Training Organisations. On the one hand, less than 20% of micro businesses had heard of National Training Organisations, whilst on the other, over 40% of businesses employing more than 500 people had heard of National Training Organisations.

NTO brand awareness by industry

Table 4.2 provides prompted awareness of the NTO brand by industry. Highest levels of awareness of the NTO “brand” were recorded as “Finance” (34.6%), “Hotels” (30%) and the Education / Health (27.0%).

Industries with lowest levels of prompted awareness appear to be in transport and storage. The relatively low construction (14.3%) and manufacturing (14.4%) awareness figures are easily explained, because so many employers had already demonstrated unprompted awareness of NTOs in these industries. The figures in this chapter for prompted awareness are always additional to figures described in chapter three for unprompted awareness. When we combine the two sets together, we will find the truest overall awareness statistics upon which to base our judgements.

Table 4.2 Recognition and awareness of the NTO brand by industry

Industry	Primary sector	Manuf-acturing	Const-ruction	Whole-sale/ retail/	Hotels/	Trans-port/ storage	Finance	Real estate/ renting	Educ/ Health/ Social*	All sectors
	%	%	%	%	%	%	%	%	%	%
Have you heard of National Training Organisations	15.3	14.4	14.3	17.0%	30.0	11.2	34.6	21.3	27.0	19.8

Base: 3,243 employers asked question 2.1 “Have you heard of National Training Organisations”.
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to question 2.1, prompted awareness of National Training Organisations – the brand

8 19.8% of the 3,243 employers asked this question equates to 18.3% of all employers taking part in the survey (base 3,507).

NTO brand awareness by region

The highest level of prompted awareness of NTOs was amongst businesses in London (27.7%) followed by the North East (25.4%), Wales (24.5%) and the north West (22.9%). The lowest level of awareness of NTOs appeared to be in Merseyside and Scotland. Whilst a considerable number of Scottish businesses had showed unprompted awareness of NTOs, Merseyside businesses demonstrated very little by way of either prompted or unprompted awareness of NTOs.

Looking at the distribution of NTO brand awareness by country we see that the most aware appear to be based in Wales (24.5%).Nearly a quarter of all businesses in Wales said they had heard of National Training Organisations and that does not include the 13.5% of Welsh businesses whom had already shown unprompted awareness of NTOs.

Table 4.3 Recognition and awareness of the NTO brand by region

Region	North East	North West	Mer sey-side	Yorks. & Humb	East Mids.	West Mids	East	London	South East	South West	Wales	Scotland	N. Ireland	All
	%	%	%	%	%	%	%	%	%	%	%	%	%	
Heard of NTOs?	25.4	22.9	6.7	17.9	21.2	20.3	18.0	27.7	15.8	17.5	**24.5**	**14.1**	**21.6**	**19.8**

Base: 3,243 employers asked question 2.1 “Have you heard of National Training Organisations”.
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to question 2.1, prompted awareness of National Training Organisations – the brand

Table 4.4 Recognition and awareness of the NTO brand by country

Country	England	Wales	Scotland	N. Ireland	All
	%	%	%	%	%
Heard of NTOs?	**19.9**	**24.5**	**14.1**	**21.6**	**19.8**

Base: 3,243 employers asked question 2.1 “Have you heard of National Training Organisations”.
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to question 2.1, prompted awareness of National Training Organisations – the brand

But would awareness levels differ by site or by IiP status? The following tables 4.5 and 4.6 headline the results of this analysis.

Table 4.5 Recognition and awareness of the NTO brand by site

Site	Headquarters	Other Site	All
	%	%	%
Heard of NTOs?	**18.9**	**22.5**	**19.8**

Base: 3,243 employers asked question 2.1 “Have you heard of National Training Organisations”.
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to question 2.1, prompted awareness of National Training Organisations – the brand

Surprisingly perhaps is the finding that proportionally greater numbers of “other” sites such as local or satellite business premises, demonstrated higher levels of unprompted NTO awareness than headquarter establishments in this survey.

Table 4.6 Recognition and awareness of the NTO brand by IiP Status

Site	IiP recognised	Not recognised	All
	%	%	%
Heard of NTOs?	**24.1**	**19.5**	**19.8**

Base: 3,243 employers asked question 2.1 "Have you heard of National Training Organisations".
Data has been weighted to be representative of the total UK business population
Results relate to the total response made by employers to question 2.1, prompted awareness of National Training Organisations – the brand

IiP recognised businesses were more likely to have heard of NTOs than non-committed businesses.

4.3 Have you heard of your industry's National Training Organisation?

All employers whom were asked whether they had heard of National Training Organisations (question 2.1) were also asked whether they had heard of their own industry's named National Training Organisation – or put another way, the NTO most likely to represent them.

Example: Have you heard of the Hospitality Training Foundation?

Of the 3,243 employers asked whether they had heard of their own industry's National Training Organisation, a total of **17.2%**[9] said they had, but 82.8% had not. This finding in itself suggests that a greater proportion of employers are aware of the NTO brand or words "National Training Organisations", than they are of the specific NTO most likely to represent them.

But how many of these employers are "additional" to those already deemed as having shown awareness of NTOs?

If we discard for a moment all those employers (19.8%) who had just stated they had heard of National Training Organisations, we still found "new" employers who had heard of their own industry's NTO but not the brand. In fact an **additional 8.3%**[10] of employers resulted.

This means that when we aggregate the responses of all employers saying that they had either heard of National Training Organisations (the brand) or their own industry's National Training Organisation, a total of **28.1%**[11] of employers had answered positively.

So already we are starting to build up a fairly comprehensive picture of types and level of awareness of NTOs / ITOs.

Total unprompted awareness baseline:	**7.5%** of all businesses (base 3,507)
Total prompted awareness of NTO brand:	19.8% of businesses asked (base 3,243) Or **18.3%** of all businesses (base 3,507)
Total prompted awareness of named NTO:	8.3% of all businesses asked (base 3,243) Or **7.6%** of all business (base 3,507)

[9] 17.2% of the 3,243 businesses asked if they had heard of their named NTO equates to 15.9% of all businesses taking part in the survey (base 3,507 businesses).
[10] 8.3% of the 3,243 employers asked if they had heard of their named NTO equates to 7.6% of all businesses taking part in the survey (base 3,507 businesses)
[11] 28.1% of the 3,243 businesses asked these questions equates to 25.9% of all businesses taking part in the survey (base 3,507 businesses)

Total awareness **33.4% of all businesses (base 3,507)**

But before we conclude this section on awareness, we must consider two final questions that were asked to the 2,333 employers who had still not demonstrated any unprompted or prompted awareness of NTOs / ITOs.

4.4 Have you heard of your Industry Training Organisations (ITOs)?

Of the 2,333 employers asked "Have you heard of Industry Training Organisations (ITOs)?" **4.0%**[12] said they had. Greatest levels of prompted ITO awareness were amongst businesses:

- Within the hotels industry (12.4%) followed by primary sector businesses (11.7%)
- Located in Wales (13.1%), the East of England (8.5%) and Merseyside (6.7%)
- Employing more than 500 people (12.4%)
- At headquarters (4.2%)
- IiP recognised companies (9.2%)

4.5 Have you heard of your named Industry Training Organisation (ITO)?

Of the 2,333 employers asked whether they had heard of their specific ITO a total of **3.4%** of employers said they had. Nearly two thirds of employers saying they had heard of their own specific ITO had not been aware of the brand or words "Industry Training Organisations."

[12] 4% of the 2,333 employers asked whether they had heard of ITOs equates to 2.6% of all businesses taking part in the survey (base 3,507 businesses)

4.6 Conclusive Baselines of Awareness of NTOs / ITOs

Considering all the findings and results described in Chapters Two and Three of this report we conclude the following statistics to be reliable baselines against which to monitor progress in future years.

Table 4.7: Baseline Awareness Figures for 1999

The total % of businesses with unprompted awareness		**7.5%**
Comprises 264 businesses		
The total % of businesses with prompted awareness		**30.1%**
Comprising:		
	NTO brand awareness (643 businesses)	18.3%
+	Named NTO awareness 268 businesses)	7.7%
+	ITO brand awareness (93 businesses)	2.7%
+	Named ITO awareness (50 businesses)	1.4%
Total Awareness (all the above 1,318 businesses)		**37.6%**
Base for all figures above		3,507 businesses

Using the overall awareness baseline figure of 37.6%, we will now examine the profile of organisations who are aware of NTOs.

Profile of Aware Organisations

Table 4.8: Profile of awareness of National Training Organisations (weighted)

Sizeband	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
1-9	3,306	1,230	37.2	**37.6%**
10-49	165	70	42.1	
50-199	26	13	48.3	
200-499	6	3	59.0	
500+	4	2	**67.7**	
Total	3,507	1,318	37.6	
Industry	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
Primary sector	189	76	40.4	**37.6**
Manufacturing	315	95	30.0	
Construction	692	350	**50.6**	
Wholesale / Retail	526	133	25.3	
Hotels	146	73	49.9	
Transport / Storage	200	44	22.0	
Finance	63	31	50.0	
Real estate / renting	700	244	34.8	
Educ / Health / Social	676	272	40.2	
Total	3,507	1,318	37.6	
Region	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
North East	101	46	**45.8**	**37.6**
North West	393	148	37.8	
Merseyside	59	18	29.8	
Yorkshire and Humber	286	102	35.8	
East Midlands	275	122	44.3	
West Midlands	306	110	35.9	
East of England	173	75	43.3	
London	390	153	39.3	
South East	731	243	33.3	

South West	299	99	33.3	
Wales	161	78	**48.7**	
Scotland	215	87	40.2	
Northern Ireland	117	35	30.4	
Total	3,507	1,318	37.6	

Table 4.8: Profile of awareness of National Training Organisations (weighted)

Country	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
England	3,014	1,118	37.1	**37.6**
Wales	161	78	**48.7**	
Scotland	215	87	40.2	
Northern Ireland	117	35	30.4	
Total	3,507	1,318	37.6	
Site	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
Headquarters	2,663	1,036	**38.9**	**37.6**
Other	844	281	33.3	
Total	3,507	1,318	37.6	
IiP Status	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
Recognised	202	83	**41.2**	**37.6**
Not recognised	3,305	1,235	37.4	
Total	3,507	1,318	37.6	
Quality Standards (eg BS5750, ISO9000)	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
Business has named standards	345	155	**44.9**	**37.6**
Business does not have named standards	3,162	1,163	36.8	
Total	3,507	1,318	37.6	
Training Plan	**Number of respondents (weighted)**	**Number of businesses aware**	**% of awareness**	**Total awareness**
Business has a training plan	870	386	**44.4**	**37.6**
Business does not have a training plan	2,637	932	35.3	
Total	3,507	1,318	37.6	

Training Budget	Number of respondents (weighted)	Number of businesses aware	% of awareness	Total awareness
Business has a training budget	530	261	**49.3**	**37.6**
Business does not have a training budget	2,977	1,057	35.5	
Total	3,507	1,318	37.6	

Table 4.8 helps us to conclude with confidence that overall awareness is **greatest** amongst:

- Businesses with more than 500 employees (67.7%), followed by similarly large business with between 200 and 499 employees (59%).
- Businesses in the construction industry (50.6%) followed closely by businesses working in the finance sector (50%)
- Businesses located in Wales (48.7%), followed by businesses in the North East region of England (45.8%).
- Headquarter sites of businesses (38.9%)
- Businesses recognised or committed to Investors in People (41.2%)
- Businesses with a recognised quality standard such as BS5750 or ISO9000 (44.9%)
- Business with a training plan (44.4%)
- Businesses with a training budget (49.3%)

Conversely, overall awareness appears to be **least** prevalent amongst:

- Micro businesses employing less than 10 people (37.2%)
- Businesses in the transport / storage industries (22%) followed closely by businesses in the wholesale / retail industry (25.3%)
- Businesses located in Merseyside (29.8%), followed by businesses in Northern Ireland (30.4%)
- Offices of businesses other than headquarters eg. local offices / satellite premises etc (33.3%)
- Businesses that are not committed to or recognised as an Investor in People (37.4%)
- Businesses that do not have recognised quality standards such as BS5750 or ISO9000 (36.8%)
- Businesses that do not have a training plan (35.3%)
- Businesses that do not have a training budget (35.5%)

Of course it is one thing to have heard of a National Training Organisation, Industry Training Organisation or even to be able to name said organisations. But does this mean that businesses also understand what those organisations do?

The next Chapter examines this very issue, and concentrates purely upon the responses made by the 1,318 businesses who had demonstrated awareness of NTOs / ITOs in the survey. It seemed pointless asking businesses with no awareness what they felt the function of NTOs to be since it would most likely simply cause embarrassment or ill-feeling towards the survey itself.

Chapter 5: Business' understanding of the roles and responsibilities of National Training Organisations

5.1 Introduction

This chapter will report on employer understanding of the roles and responsibilities of NTOs. At this stage of the survey, only those businesses who had demonstrated awareness of NTOs / ITOs (a total of 1,318 separate businesses[13]) were asked questions about their understanding of the function or remit of NTOs as they saw it. Firstly, they were asked without any prompting:

"What do you think or understand to be the role of National Training Organisations?"

It is significant to point out that only 31% of the 1,318 businesses (405) could provide an unprompted description of what they thought to be the role of NTOs. The remaining 69% could not think of anything to say and so answered:

"I have heard of NTOs but have no understanding (of their roles)."

If we interpret these statistics in relation to the overall sample of 3,507 businesses taking part in the survey we can conclude that:

- 38% of businesses (1,318) demonstrated awareness of NTOs
- 12% of businesses (405) could describe the role of NTOs without being prompted

This of course highlights the need not only to generate awareness of a brand name or concept, but genuine awareness of what that brand is or can do for the business.

What would we hope employers understand the role of NTOs to be?

NTOs do have some common responsibilities, but it would be a misrepresentation to suggest that they are uniform. They differ significantly in size, staff numbers, financial resources, operational activities and scope. However, in general they NTOs are charged with the responsibility to:

- lead the nation's drive for world class skills
- be the nationally-recognised voice of employers on education and training
- bring employers together to say what skills are needed in their industries and how those skills can be achieved
- lead the development of qualifications based on national occupational standards.

The NTO Network is also keen to promote key messages to employers that they hope will ultimately penetrate the workplace:

- NTOs develop practical solutions to training problems
- NTOs make the business case for investing in training
- NTOs ensure that employers' views on education and training are heard

[13] weighted data

Having analysed the 405 unprompted responses made by employers to this section of the survey, we have sought to attribute as far as possible their descriptive responses to the underlying roles of NTOs. It is our opinion that it was difficult for employers to articulate what NTOs are about, and what their function or role actually is. There were also some misperceptions about what NTOs do, and it is hoped that the following quotations help to convey this mixed range of opinions expressed by employers.

Table 5.1: Employers' unprompted perception of the role of NTOs

Perception of the role of NTOs (coded for the purpose of this report)	Selective Quotations
Advisory and Information Role	***"Advise on training courses, finding apprentices and funding"*** ***"Give advice on what is available. Training for business."*** ***"Good practice and providing advice on courses."*** ***"Keep industry informed of new trends."***
Development of training frameworks	***"Assessing the requirements of the industry in terms of skills needs"*** ***"Benchmarking for training, skills and qualifications."*** ***"Bodies that oversee the development of NVQs for specific sectors."*** ***"Awarding body that pulls together the NVQ framework for the industry."***
Influencing – partners, the sector and training providers	***"Co-ordinating training on a nationwide scale liasing with educational institutions."*** ***"Co-ordinate the training of salon staff with colleges"*** ***"Linking students and companies."*** ***"Providing a voice on the development of NVQs."*** ***"Represent their industry to Government vocalising their needs."*** ***"Work with careers companies."***

Perception of the role of NTOs (coded for the purpose of this report)	Selective Quotations
Encouraging new entrants into their industry	***"Bring in youngsters with some of the skills needed to go into an in industry."*** ***"Apprentice training"*** ***"Encouraging trainees."*** ***"Helps young people to learn trades to get jobs."***
Standards Role	***"Development of competent standards and the promotion of vocational standards."*** ***"Ensure the industry has proper training standards in place within the national framework."*** ***"Facilitate an increase in standards in the workplace."*** ***"Guardians of national standards in qualifications."***
Training enablers	***"Collect levy and supply training and certification for skilled employees"*** ***"Develop training strategies for industry."*** ***"Enforce training programme into businesses."*** ***"Facilitators of training for industry."*** ***"NVQ accreditation and vetting."*** ***"Promote training."***

It is not so clear as to whether the following perceptions about NTO roles are actually correct or incorrect, but they are mentioned simply because the activities described would not be regarded as mainstream across the NTO Network.

"Funded by Government to organise <u>placement</u> and training of youngsters."

"Health and Safety training."

"Monitor employers as they do on-site training."

"Place school leavers into jobs where employers can supply training."

"Provide discount prices on training courses."

"Provide specialist training."

"Reduce number of people unemployed and create job opportunities."

5.2 Prompted Understanding of the role of NTOs

Having established unprompted understanding of NTOs, the interviewer then asked a series of ten prompted statements that could all feasibly have been regarded as the roles and responsibilities of NTOs. There were two exceptions though – “red herrings” – which did not accurately describe NTO responsibilities. These were:

☠ To inspect training at employers’ own premises

☠ To provide teacher training

This question was only asked to those 405 businesses who had previously attempted to describe the role of NTOs. The question and resulting responses are provided in Table 5.2 and the base for the table is **405 businesses**.

Table 5.2: What are NTOs responsible for? (weighted)

🗐 ☠	Prompted Statement	Number of businesses	% weighted	Rank
🗐	Encouraging employers to train their workforce	318	78	1
🗐	To influence education and training providers to offer relevant course and qualifications	313	77	2
🗐	Designing the procedures for training new entrants to the industry such as apprentices	311	77	3
🗐	Helping to develop national Occupational Standards	309	76	4
🗐	Promoting initiatives like Investors in People	294	73	5
🗐	To represent employers’ views on education and training and ensure that they are heard by government	281	69	6
🗐	To improve links between industry, schools, Further Education and Higher Education	272	67	7
🗐	Bring employers together to say what skills are needed now and in the future in their industry	261	64	8
☠	To inspect training at employers’ own premises	171	42	9
☠	To provide teacher training	102	25	10

Base: 405 employers asked what they felt to be the responsibility if NTOs
Data has been weighted to be representative of the total UK business population
The percentage has not been calculated or presented in relation to the entire number of businesses taking part in the survey (3,507).

The most popularly perceived responsibility of NTOs was “encouraging employers to train their workforce”. This perception was especially prevalent amongst businesses:

- employing 200-499 people (90%)
- in the hotel industry (96%) and real estate / renting industries (95%)
- in the North East (99%) and the South West (97%)
- with IiP recognised businesses (91%)
- that had demonstrated prompted awareness of NTOs (81%).

This responsibility did not strike as much a chord with transport and storage businesses of which only 45% said that encouraging employers to train their workforce was a role of NTOs.

5.3 The Difference in Opinions and Perceptions about the Role of NTOs

On further analysis, there seemed to be distinct patterns of perception formed by (a) businesses who had initially demonstrated unprompted awareness of NTOs and (b) businesses that had shown prompted awareness of NTOs. These patterns can be summarised as follows:

Businesses who had demonstrated **unprompted** awareness of NTOs ranked the following as the key roles of NTOs:

1 = Designing the procedures for training new entrants to the industry (84%)

2 = Helping to develop occupational standards (75%)

3 = To influence education and training providers (74%)

Base: 147

Whereas businesses who had shown **prompted** awareness of NTOs before being given these statements ranked NTO roles as follows:

1 = Promoting initiatives like Investors in People (82%)

2 = Encouraging employers to train their workforce (81%)

3 = To influence education and training providers (74%)

Base: 258

Opinions were in fact very different between unprompted aware and prompted aware groupings of businesses. Table 5.3 demonstrates just how far apart these perceptions were.

These findings may be particularly helpful to the Department if it wishes to:

- Understand what is the most popular perception of NTO roles amongst UK business.
- Prioritise which messages it would like to communicate to UK businesses, currently not permeating employers' consciousness.
- Put right the misperceptions that exist amongst some UK businesses about the role of NTOs. For example, the two "red herring" descriptions were answered in the main by: businesses in the wholesale, retail and hotel industries; by micro businesses (employing less than 10 people); and by businesses in Merseyside.

Table 5.3: Differences in opinion about the role of NTOs (weighted)

🗐 ☠	Prompted Statement	% of businesses that had been aware of NTOs unprompted	% of businesses that had been aware of NTOs prompted	% Variance
🗐	Encouraging employers to train their workforce	73	81	8
🗐	To influence education and training providers to offer relevant course and qualifications	73	79	6
🗐	Designing the procedures for training new entrants to the industry such as apprentices	84	73	11
🗐	Helping to develop national Occupational Standards	75	77	2
🗐	Promoting initiatives like Investors in People	55	82	27
🗐	To represent employers' views on education and training and ensure that they are heard by government	61	74	13
🗐	To improve links between industry, schools, Further Education and Higher Education	54	75	21
🗐	Bring employers together to say what skills are needed now and in the future in their industry	44	76	32
☠	To inspect training at employers' own premises	34	47	13
☠	To provide teacher training	16.0	31	15
Base		147	258	-

Base: 147 unprompted aware businesses and 258 prompted aware businesses.
% given represent the proportion of businesses within each sample stating yes to the statements provided, in order to compare the variance in opinion between the two groupings.
Data has been weighted to be representative of the total UK business population
The percentage has not been calculated or presented in relation to the entire number of businesses taking part in the survey (3,507).

Conclusion for this section – the role of NTOs

Only 31% of aware employers could provide a meaningful description of the role of NTOs in an unprompted scenario. Of those employers with a perception, in general, they tended to relate in some way to the broad remit and responsibilities of NTOs, but there were some misperceptions about role and function. Employers found it hard, in general, to articulate what they felt NTOs were about. Encouraging employers to train their workforce was the most popular perception amongst employers of the role of NTOs.

Chapter 6: Employer contact with NTOs

6.1 Introduction

The Department wished to gain a clearer understanding of the level of contact between NTOs and businesses in the UK in the past 12 months. As such, the questionnaire sought to establish:

(1) The amount of contact made proactively by businesses in terms of communicating with an NTO and seeking advice or guidance on issues

(2) The amount and type of proactive communication that had been undertaken by NTOs with their customer base

This chapter concentrates on the sample of businesses that had demonstrated awareness of NTOs as described in Chapter Four. This means that in theory 1,318 businesses could have answered this question:

"Have you contacted a / your NTO / ITO /LB / All Sector NTO in the last 12 months?"

Unfortunately, a small number of employers were not given the opportunity to answer this question owing to some recoding and redefinition of "unprompted awareness" after the fieldwork had been completed. However, the vast majority (97%) of all those eligible to answer questions about communication with NTOs were included in the survey. This chapter therefore focuses upon the responses made by 1,275 businesses, all of whom had previously demonstrated awareness of NTOs / ITOs.

6.2 Have you contacted an NTO in the last 12 months?

There is nothing forcing businesses to contact NTOs. Rather, it is only through an awareness and understanding of what NTOs can do for businesses that will ultimately encourage impromptu contact by employers. This baseline survey has established that only **151 businesses** had contacted an NTO in the past 12 months of their own volition. What does this mean? It indicates that:

At most, 4.3% of all UK businesses have contacted an NTO in the past 12 months

12% of those businesses aware of NTOs have contacted an NTO in the past 12 months

6.3 Who was most likely to have contacted an NTO?

Trends did emerge in terms of which type of businesses had contacted an NTO in 1998 / 1999. Table 6.1, for example, shows us that over 25% of all businesses employing more than 500 people, that were aware of NTOs, did actually contact an NTO in 1998 / 99. Conversely, only 12% of micro businesses that were aware of NTOs had contacted an NTO in that period. In simple terms, the larger the business, the more likely it is that they had contacted an NTO.

Table 6.1 Have you contacted an NTO (1998/99). Distribution by size of business.

Size of employer	1-9	10-49	50-199	200-499	500+	Baseline
	%	%	%	%	%	%
Have you contacted an NTO?	12	16	18	25	25	**12**

Base: the bases vary for each of the sizebands and the % in the table represent the proportion of businesses in each sizeband asked that had contacted an NTO.
The baseline column indicates that overall, 12% of the 1,275 aware businesses contacted an NTO
Data has been weighted to be representative of the total UK business population

When we look at the pattern of communication between types of business industry and their NTO, we can see that those in construction have been the ones to have made most contact – over 26% have contacted an NTO in 1998 / 1999. Presumably, much of this contact has been with CITB.

Least likely to have contact an NTO have been businesses within the finance industry and transport and storage industry businesses.

Table 6.2 Have you contacted an NTO (1998/99). Distribution by industry.

Industry	Primary sector	Manuf-acturing	Const-ruction	Whole-sale/ retail/	Hotels/	Trans-port/ storage	Finance	Real estate/ renting	Educ/ Health/ Social*	Baseline
	%	%	%	%	%	%	%	%	%	%
Have you contacted an NTO?	13	13	27	6	5	1	<1	8	4.0	12

Base: the bases vary for each of the industries and the % in the table represent the proportion of businesses in each industry asked that had contacted an NTO.
The baseline column indicates that overall, 12% of the 1,275 aware businesses contacted an NTO
Data has been weighted to be representative of the total UK business population

Further analysis implied that businesses based in the East of England had undertaken most proactive contact with NTOs in 1998 /1999 (22% of all aware businesses). Least likely to have contacted NTOs were businesses based in Merseyside (2% of all aware businesses in this region).

Interestingly, Scottish businesses that had been aware of NTOs had actually contacted NTOs the most during 1998 /1999 with 43% reporting that they had done so. This compares extremely favourably to businesses in England, Wales and Northern Ireland as presented in Table 6.3. There is an unusual profile developing amongst Welsh businesses, who on the one hand demonstrated the highest level of awareness amongst businesses, but who on the other hand showed the lowest propensity to actually contact an NTO.

Table 6.3 Have you contacted an NTO (1998/99). Distribution by country.

Type of Awareness	England	Wales	Scotland	N. Ireland	Baseline
	%	%	%	%	%
Have you contacted an NTO?	**9**	**5**	**43**	**23**	**12**

Base: the bases vary for each of the countries and the % in the table represent the proportion of businesses in each country asked that had contacted an NTO.
The baseline column indicates that overall, 12% of the 1,275 aware businesses contacted an NTO
Data has been weighted to be representative of the total UK business population

Perhaps the most fascinating and opposing characteristics, however, were between those businesses that had shown unprompted awareness of NTOs and those who had demonstrated awareness of NTOs only when prompted. Table 6.4 implies that a far greater proportion of businesses that had immediately thought of NTOs when given trigger words such as “training” or “skills” had contacted an NTO when compared to those who had been asked whether they had heard of NTOs.

Table 6.4 Have you contacted an NTO (1998/99). Distribution by country.

Country	% of businesses that had been aware of NTOs unprompted	% of businesses that had been aware of NTOs prompted	Baseline	% variance
	%	%	%	%
Have you contacted an NTO?	**42**	**6**	**12**	**36**

Base: the bases vary for each of the groupings and the % in the table represent the proportion of businesses in each grouping asked that had contacted an NTO.
The baseline column indicates that overall, 12% of the 1,275 aware businesses contacted an NTO
Data has been weighted to be representative of the total UK business population

Looking lastly at contact of NTOs by type of site and IiP status we noted that:

- Only 12 of the 151 businesses (8%) to have contacted NTOs were from “other” offices ie. not Headquarters
- Surprisingly perhaps, 142 of the 151 businesses contacting NTOs (94%) were not recognised as an Investor in People.

We conclude therefore that there is a direct correlation between businesses that have an unprompted awareness of NTOs and their proactive contact with NTOs. Those who demonstrated prompted awareness of NTOs, were much less likely to have contacted an NTO.

The assumption therefore that awareness of NTOs is not enough to encourage use of their services is, whilst perhaps extremely obvious, very well made. The challenge for NTOs is not simply to generate an awareness of their name, but to engender and promote an understanding of what they are responsible for, and what they can do for businesses. Otherwise, at best, this baseline survey indicates that less than 12% of businesses that are actually aware of NTOs will ever make contact.

Hypothetically, if the Department wished to set a target for 10% of all UK businesses to make contact with an NTO of their own volition in a 12 month period, it would have to generate "brand awareness" of close to 87% in order that this could be achieved. This is 2.32 times the current awareness level and is unrealistically going to be achieved in any short space of time by the NTO network.

It would seem to make more sense in improving the level of understanding about role of NTOs amongst aware businesses, rather than simply generating awareness of the brand amongst all businesses, in order that there is a progressively higher proportion of aware businesses making contact with an NTO than present. Put in statistical terms, to achieve the 10% target described above, the challenge would be to increase the 12% of aware businesses making contact with an NTO to around 28% of aware businesses making contact.

6.4 Why did some businesses contact NTOs?

We have already established that 151 businesses did contact an NTO in 1998 /1999. We were interested to know why they had contacted an NTO. The Steering Group defined a list of core operational activities, services, information or advice and guidance that an employer could expect help with if they contacted their NTO (this list is presented in Table 6.5 overleaf).

Context – DfEE's Learning and Training at Work Survey (1999)

Though not directly comparable owing to different sampling methods employed and the phrasing of questions within the survey, it is still worth referring to the 1999 Learning and Training at Work Survey undertaken in 1999 by IFF Research on behalf of the DfEE.

4,008 interviews were completed for the survey. 24% of the 2,622 employers that had demonstrated awareness of NTOs had contacted an NTO. The main purpose of contact had been:

- To learn about sources of education and training, to find out about the availability of training courses or to develop training techniques
- To find out about funding for training
- For advice about developing a business

The reasons for contact during 1999/2000

151 businesses from this survey of employers (4% of all businesses surveyed) contacted an NTO in the last 12 months. When we look at the number of businesses contacting an NTO for a specific reason as presented in Table 6.5, we must be aware that even the most popular response "To get advice on Modern Apprenticeships" was made by only 67 businesses. The samples are small and care should be taken in overstating their importance or credibility. Businesses could contact an NTO for more than one reason, and our survey recorded that the 151 businesses making contact collectively did so for 253 reasons

Table 6.5 Reasons for contacting an NTO in 1998 / 1999

Why did you contact an NTO?	Number of businesses stating this reason	% of 151 businesses that contacted an NTO
To get advice on Modern Apprenticeships	67	**45**
To establish the availability of training courses	57	38
To obtain funding for training	35	23
Other	30	20
Off the job training	16	11
To develop training techniques	13	9
To obtain advice on recruitment	12	8
To get advice on National Vocational Qualifications	9	6
To get information on the skills needs of their industry	7	4
To obtain advice on quality standards	4	3
To get advice on national Traineeships	3	2
Totals	**253**	**151**

Base: Businesses could give more than one response to this question. 151 businesses collectively provided 253 responses, hence the different bases presented in Table 6.5.

The main type of enquiry related to getting advice about Modern Apprenticeships or to establish the availability of training courses. These findings are broadly in line with the 1998 Skill Needs in Britain Survey.

There was little by way of trend (given the small sample sizes involved) to distinguish between the types of firm making enquiries. Most tended to be made by construction firms, by micro businesses and by businesses based in England as opposed to Scotland, Wales or Northern Ireland. But, it is worth noting the other reasons some employers gave for contacting their NTO during 1999/2000.

Other reasons for contacting NTOs

30 businesses stated other reasons for contacting NTOs primarily to do with obtaining industry-specific information. Some examples are provided to demonstrate the point:

Construction Industry

"Wanted to know about forklift and lifting equipment training"

"Made enquiry about safety awareness in-house."

"Wanted to talk through some issues about the levy we pay."

Wholesale and Retail Industry

"Advice regarding supervisory training."

"Needed information about beef labelling"

Hotels and Restaurants

"Wanted information about a customer care programme."

"Looking at linking NVQs to our chain as a whole."

Transport, storage (and communications)

"Call centre training."

Real estate, renting (business activities)

"Information about skill shortages and New Deal."

"Year 2000 training."

Education, Health and Social organisations

"Needed competency statements."

"Internal verification."

"Worked together to design a new qualification – the Certificate of Community Justice."

6.5 Satisfaction with NTO Services

It is worth stressing that only 151 businesses had contacted an NTO, and that this section analyses responses made by even smaller sub-samples of businesses that contacted NTOs for specific reasons.

If a business contacted an NTO, it has been interpreted that they did in fact make use of a service, usually manifesting itself in the form of advice, information, guidance or signposting. So for each business that contacted an NTO we asked them to rate their satisfaction with the “service” received. Over the years to come, we feel confident that as understanding and usage of NTO services increases, this section of any future survey will become more robust and important in terms of measuring NTO progress. If we hypothetically had to gather all these pieces of data together and wanted to arrive at an overall baseline satisfaction statistic we would find the following result for 1999.

Baseline statistic for NTO service satisfaction level:

The satisfaction mean for 1998 / 99 is 3.7, which can be interpreted as being between of adequate satisfaction (a mean of 3.0) and of good satisfaction (a mean of 4.0), tending towards a good level of satisfaction.

Weighted data, national survey of employers 1999, base: 151 businesses

For now though we are limited to a small set of NTO service users from which to obtain useful data and make sensible comment. Table 6.6 illustrates the number of service users and the mean satisfaction score per service so we can, in theory at least, compare service satisfaction levels. The calculation has been made per service as follows:

Example: 67 businesses contacted an NTO to obtain information on Modern Apprenticeships. If they said they were very satisfied they scored the service 5. If they scored the service as very unsatisfactory they provided a score of 1. In this example we found that:

0 businesses scored the service as a 1	[calculation: 0 * 1 = 0]
3 businesses scored the service as a 2	[calculation: 3 * 2 = 6]
7 businesses scored the service as a 3	[calculation: 7 * 3 = 21]
38 businesses scored the service as a 4	[calculation: 38 * 4 = 152]
19 businesses scored the services as a 5	[calculation: 19 * 5 = 95]

By adding together the calculation sums for each score we arrive at a figure of 274. If we then divide this by the total number of respondents willing to score that service, which in this case was 67 we derive a mean satisfaction score of 4.09 which we can interpret as being high on the scale of satisfaction.

Table 6.6 NTO Service Satisfaction Levels 1998 / 1999

Reason for contact / service used	Number of businesses using this service	Mean satisfaction score	Rank
Off the job training	16	**4.2**	1
Other	30	4.1	2
To get advice on Modern Apprenticeships	67	4.1	3
To obtain advice on quality standards	4	4.0	4
To establish the availability of training courses	57	3.9	5
To get advice on National Vocational Qualifications	9	3.8	6
To obtain advice on recruitment	12	3.8	7
To develop training techniques	13	3.7	8
To obtain funding for training	35	3.3	9
To get advice on National Traineeships	3	3.0	10
To get information on the skills needs of their industry	7	2.7	11
Base	**253**	**-**	**-**

6.6 NTO Commendation

We asked the 151 employers who had had dealings with an NTO in 1998 / 1999 whether they would recommend using an NTO to other employers with the following result:

Baseline statistic for NTO commendation

85% of businesses that contacted an NTO in 1998 / 1999 and used a service (obtained information, advice or guidance on a particular issue) said they would recommend using an NTO to other employers.

Weighted data, national survey of employers 1999, base: 151 businesses

6.7 Personal Involvement with NTOs

There was always the potential that results might be positively skewed if the sample of 3,507 randomly selected businesses comprised great numbers of individuals whom were in someway especially affiliated to or involved with an NTO's inner workings. We are in many ways pleased to report that very few individuals had such high level of dealings with any of the 70 recognised NTOs, and as such the reliability of the baseline statistics presented throughout the report stands in tact. Negligible effects will have been made by the following group of people's responses. Only 37 individuals (1% of the entire sample) were involved in a steering group, committee, working group or other NTO related activity. Interestingly perhaps, no one from businesses with less than 50 employees contacted as part of this survey was involved in an NTO working group, steering group or committee.

How well is your NTO doing in raising awareness?

When asked "how well do you feel the NTO is raising awareness of its activities with employers in its sector" 29 of the 37 employers with personal involvement were prepared to make comment. When we calculate the mean score of all responses we established that the general mood is that their NTO was doing "quite well" at raising awareness.[14]

The small sample of employers involved (29) who, when their responses were aggregated, said their NTO was doing quite well justified this by describing the merits of the NTO they were judging. For example, the efficiency of the NTO, the frequency of mailing information to employers about training, the production of a regular newsletter or the long-standing history of an NTO – or should we say its predecessing ITO. For those not so positive about their NTO's awareness raising activities, reasons included: "campaigns started but that fizzled out; "appear to be bogged down by NVQs"; "too remote and not much information available yet."

Conclusion for this section – communication by employers

This chapter has examined the quantity and type of businesses that have initiated contacted with an NTO in 1997 / 1998, and has concluded that less than 12% of employers aware of NTOs had made such efforts to communicate. Whilst reasons for contact varied, and employers on average contacted NTOs for 1.62 reasons , the main purpose for most was to gain advice on Modern Apprenticeships, to establish the availability of training courses and / or to obtain funding for training.

The question must be asked: "What is the implication for NTOs if employers do not know about the full portfolio of services available?"

The next chapter will look at the prevalence of contact initiated by NTOs with businesses in the same time period, since clearly NTOs have been undertaking awareness raising activities of their own as much as relying on businesses to get in touch.

[14] the mean score was 2.86 where 4.0 could have been the highest score "very well". 3.0 as a score indicates that the NTOs were doing "quite well" at raising awareness amongst employers.

Chapter 7: NTO contact of employers

7.1 Introduction

This chapter explores the ways in which employers have been contacted by NTOs, and the opportunities there maybe for helping NTOs fine-tune their communications plans.

Owing to the way in which the questionnaire had been constructed we can return to reporting upon the 1,275 businesses (aware of NTOs) that were asked a series of questions relating to NTO contact. The first of these questions was quite simply:

Have you been contacted by your NTO / ITO in the last 12 months?

278 businesses from the 1,275 businesses asked this question said they had been contacted by an NTO in the past 12 months. This means that 22% of all "aware" businesses had been contacted by an NTO in that time period. Put another way, this perhaps suggests that only 8% of all UK businesses (using our base of 3,507 businesses involved in this Survey) have been contacted in 1998 / 99.

We can conclude therefore that NTOs have been more proactive in initiating communications with businesses than the other way round. 22% of "aware" businesses have been contacted by NTOs whilst only 12% of these businesses had contacted NTOs.

Where was the concentration of contact by industry?

If we look more closely at which businesses said they had been contacted we found that construction industry businesses seemed to have had most contact from NTOs (161 of the 278 businesses or 58% contacted were from this industry). We noted that 40 of the 278 businesses contacted by an NTO were from real estate / renting activity industries (14%). But analysed another way, we see that proportionally transport and storage businesses have been the recipient of most NTO contact since 50% of all "aware" businesses in this sector stated contact from an NTO. And yet, consistently in this report, transport and storage businesses have demonstrated poor awareness and low levels of proactive communication themselves.

Where was the concentration of contact regionally?

Scottish businesses were more likely to have been contacted by an NTO than any other region or country, with 35% of all "aware" businesses in this industry stating they had been contacted by an NTO. The highest number of businesses stating contact from an NTO were based in the South East (49 out of 278 businesses contacted). Least contact had been made with businesses in Merseyside (only 1 business contacted) and in the North East (only 7 businesses contacted).

Where was the concentration of contact by size of business and site?

92% of all businesses contacted by an NTO were micro, employing less than 10 people, which does seem to suggest that NTOs are generally making efforts to inform and communicate with smaller employers. However, 89% of all businesses that had received contact from NTOs had been Headquarters – only 11% were from other sites.

7.2 Method of contact by NTOs to businesses

Of the 278 businesses contacted, over two thirds (68%) had received a mail shot or a letter from an NTO, whilst just under a quarter (24%) had received a telephone call. Table 7.1 highlights all the ways in which NTOs have contacted businesses.

Table 7.1 How NTOs have contacted employers in the past 12 months

Method of contact by an NTO to businesses	Number of businesses contacted	% of aware businesses contacted
	%	%
Mail shot / letter	189	68
Telephone	68	24
Visited by NTO	28	10
Other	9	3
E-mail	3	1
NTO event	0	0
Local business / network meeting	0	0
Fax	0	0
Base	278	1,275

Base: Three different bases are presented in this table to allow for adequate comparison and interpretation by the reader. 278 is the number of businesses contacted by an NTO. 1,275 is the number of aware businesses in the survey.

Contact by NTOs is largely impersonal. Traditional methods of impersonal communication such as sending a letter or mail-shot prevail. But it is interesting that over 28 businesses had been visited by an NTO employee. This type of communication tends to take place when a relationship has already been struck for some time between organisations. Of the 28 businesses saying they had received a visit from an NTO most were in one of three industries namely construction, real estate / renting activities and the wholesale /retail industry.

Other ways in which NTOs had contacted employers included: consultation process; personal contact from a Director of the NTO; through a magazine or brochure; through some software and through training service providers.

But is this how businesses would like to be contacted?

Context – IRB Research Study

IRB Research was commissioned by the Central Office of Information and the National Training Council to complete an Evaluation of National Training Organisations in April 1999. Part of that evaluation comprised a quantitative telephone survey of 250 employers (employing more than 50 people). A section within that questionnaire asked employers "What would be the most suitable way for NTOs to communicate with your business?". The findings were that the four most recommended methods of communications media by employers were:

1. Direct mail
2. Advertising in trade press
3. Personal contact including seminars
4. Website

Report on NTO Activities

Pye-Tait completed a survey for the DfEE between September and December 1999, which was based upon a postal questionnaire to 71 NTOs. This report indicated that:

- 90% of responding NTOs distributed newsletters to industry sectors. The most common frequency of distribution is quarterly (35% of NTOs) with 23% distributing more frequently. Pye-Tait estimated that the maximum penetration rate of all newsletters going out in any given mailing is around 11% of UK businesses.

- 55% of the NTO network hold one or more conferences every year and 61% hold one or more seminars each year. Pye-Tait estimated that probably around 5,000 employers attended an NTO conference or seminar during 1999.

- 58 NTOs have their own web-sites (84% of the network) and 3 NTOs have more than one site to their name. Almost 70% of sites are experiencing less than 2,000 hits every month or 400 visitors per month. Generous calculations suggested that the whole NTO network receives around 5.5 million "hits" (not visitors) per year on their websites.

- 87% of NTOs have a database of their "audience". 50NTOs could state the size of their databases, and collectively they held contact details for 300,000 employers which is around 8% of all UK businesses.

The questionnaire for this 1999 Survey went on to ask businesses (a) how would they generally like to be contacted by an NTO and (b) what style of communication would they prefer on training or skills issues.

7.3 Preferred method of contact

Table 7.2 compares the actual methods of communications employed by NTOs in 1998 / 1999 with preferred methods of contact as businesses would like to see it in the future. All statistics are expressed as percentages. The base number of businesses asked about how they were contacted by NTOs is 278. The more general questions about preferred methods of contact were asked to all 1,275 businesses that had demonstrated NTO awareness.

Table 7.2a How employers would like to be contacted

Method of contact by an NTO to businesses	%of businesses contacted by an NTO in the manner described	% of businesses that would like to be contacted by an NTO in the manner described	% of businesses that would like to be contacted on training and skills issues in the manner described
	%	%	%
Mail shot / letter	68	74	72
Telephone	24	22	19
Visited by NTO	10	5	4
Other	3	5	7
E-mail / website / internet	1	3	3
NTO event (seminar / workshop / conference)	0	2	<1
Local business / network meeting	0	2	1
Fax	0	6	4
Base	278	1,275	1,275

Base: 278 is the number of businesses contacted by NTOs that were asked what method of communication the NTO employed. 1,275 is the total number of businesses that had demonstrated awareness of NTOs during the survey.

Table 7.2 appears to indicate that mail-shots and letters are both the most common and preferred method of contact for NTOs to contact employers regardless of whether it is general correspondence, or specifically about training and skills issues.

Of the “other” types of communication methods mentioned, in fact what respondents demonstrated was a sense of apathy. For example, of the 67 businesses who when asked “how would you generally like to be contacted by an NTO?” said “other”:

- 11 said “any” style of communication was acceptable. They had no preference.
- 17 said they would rather not receive any contact from NTOs.

Revealingly, a third of these 67 businesses said they would prefer or simply refer contact by an NTO to their Head Office or equivalent central department located elsewhere.

To inform NTOs’ approach to communication with employers, we analysed further the responses and preferences of the 278 businesses who had been contacted by an NTO in the past 12 months.

Table 7.2b How employers would like to be contacted

Method of contact by an NTO to businesses	Number of businesses contacted by an NTO in the manner described	Number of businesses that did not receive contact in the manner described	Number of businesses not contacted in this method that would like to be contacted by this method
Mail shot / letter	189	89	40
Telephone	68	210	39
Visited by NTO	28	250	26
Other	9	269	0
E-mail / website / internet	3	275	7
NTO event (seminar / workshop / conference)	0	278	12
Local business / network meeting	0	278	12
Fax	0	278	22
Base	278		

Base: 278 employer that had been contacted by an NTO in the past 12 months
Figures in the first column do not add up to 278 as some businesses said they had been contacted by an NTO using more than one method.

Table 7.2b suggests that there is even more scope for mailed information as 40 businesses out of the 89 that had not been contacted in this fashion stated it as their preferred means of receiving information from an NTO. This statement is further corroborated by the finding that 78% of businesses that had not been contacted by an NTO in the past 12 months (778 business out of 997 businesses not contacted by an NTO) stated postal correspondence as their preferred means of NTO correspondence.

Nearly 19% of businesses that had not been contacted by telephone said that they would prefer this method of NTO correspondence (39 businesses out of 210 businesses). This complemented the finding that 20% of all businesses that had not been contacted by an NTO in the past 12 months also said they would prefer this method. Just over 10% of businesses not visited by an NTO said they would prefer this type of communication (26 businesses out of 250 businesses).

These analyses suggest that there is more scope in the short and medium term for raising awareness through direct mail and telephone communication rather than through more personal techniques. The website is not a preferred method of communication for many employers. The fax has not been used, it appears, by NTOs to communicate with employers, and yet it may be worth investigating the merit of adopting this approach in future.

Conclusions for this section – Communication by NTOs

A fifth of employers that had been aware of NTOs stated that they had received contact, mostly by way of letters or mailshots, from an NTO in the past 12 months. We cannot be certain whether this is an impressive statistic or not, because there is no baseline target for NTO audience penetration against which to compare.

The Pye-Tait survey of NTO activities in 1999 demonstrated that a high proportion of NTOs have databases (87% of the Network) and websites (84% of the Network). This at least implies that there is the opportunity for NTOs to both (a) execute mailings and (b) receive hits from employers interested in getting information from an NTO website in future.

In the pre-survey phone round of over 40 NTO Chief Executives, few mentioned that their NTO had undertaken direct awareness raising campaigns with employers. Many spoke however of their investment in a website that would continue to be developed in 2000 and on an ongoing basis. Despite these major website developments, this sample of employers seemed less than keen to receive information by e-mail or through the internet or websites. Again, this survey cannot make judgements about the effectiveness of website communication since it has not been researched, but it can go as far as pointing out that preferred methods of communication appear to be by mailshot, letter or telephone in the short to medium term.

Each NTO will interpret these general findings differently owing to their own variations in terms of human, financial and physical resources. Looking at staffing levels amongst NTOs for example a total of 22 (31% of the network) have less than 5 staff while 29 NTOs (41% of the network) have less than 5 directly employed staff. Excluding one NTO, which employs over 1,000 staff, the average size in terms of directly employed staff is a little over 11 people. Given the range of operational activities that an NTO has to fulfil, it is obvious that each organisation will make their own decisions about the extent and mode of communication with their audience(s) that best fits their own resources and capabilities.

This employer survey does go a long way to providing a baseline statistic for two-way NTO – employer communication. *Is it enough that a fifth of employers (in this survey) had received contact by NTOs? Is it enough that 12% of aware employers made contact with NTOs?* Perhaps the broad remit of NTOs and its requirement to be representative of all businesses in the whole of the United Kingdom is understated in terms of allocating appropriate resources to achieve a nationwide awareness and understanding?

Whilst there has been the development of 4000+ case studies, 2000+ contact listings, an extensive national advertising and publicity campaign, sector specialist journal advertisements and follow-up articles[15], very few of these initiatives appear to have got through to this sample of UK employers. The bigger question is more challenging though: *"How can NTOs seek or claim ultimately to truly speak for all employers when presenting opinions to Government if the level of awareness is low, and the understanding of NTO function lower still?"* . The level of understanding will directly correlate with the amount and type of communication proactively undertaken by NTOs since we have established through this survey, proportionally less employers will contact an NTO themselves.

On a more positive note, part of the IRB survey established that just over a third of interviewees were interested in hearing from their NTO and nearly a half were quite interested in hearing from their NTO. In this 1999 employer survey of all 3,507 businesses interviewed, regardless of whether they were aware or not of NTOs, 2,011 or 57% said they would be interested in receiving information about NTOs.

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[15] Information provided by the NTONC Steering Group representative during this study

Chapter 8: Employer Attitudes

8.1 Introduction

The main focus of this study has been on establishing baseline levels of NTO awareness and usage. But as with all surveys, there is always the opportunity to gain interviewee opinion to a range of qualitative issues. The Department decided that it would like to examine the opinions of employers towards the following five topic areas as part of the survey:

1. Who benefits most from National Training Organisations and why?

2. How should NTOs be funded?

3. What are the main business issues for companies in the next 12 months and do employers feel that NTOs could help deal with such priority issues?

4. What other organisations have employers heard of that could ultimately be perceived as similar bodies by the general UK business populace?

5. How likely are employers to contact their NTO in 1999/2000?

At this stage of the survey, only “aware” employers were asked these questions, and so where quantitative data is presented in this chapter, the base will be 1,275 businesses unless otherwise stated. However, since these questions in the main extracted open responses from interviewees, much of our interpretation is qualitative rather than quantitative in nature.

(1) Who do you think benefits most from NTOs?

Context

NTOs exist primarily to benefit employers. They do however have a role to work in local and regional partnerships with establishments such as schools, further and higher education institutions and careers services. Their remit is very broad despite limited resources. In the1999-2000 NTO Prospectus one of the four priority areas for NTOs to address was to assess their capability to deliver quality services throughout the UK, working through effective partnerships, including with other NTOs, where appropriate.

69% of interviewees had previously said they had heard of NTOs, but had no understanding of what their role was. When interpreting the qualitative responses that follow therefore we must be mindful that seven out of every ten responses provided were perceptual rather than informed. Interviewees could make more than one response, and often did, for example they might say that an employer benefited from NTOs, but they might also have felt that a “customer” or “end-user” (see example below) might benefit from NTOs also.

Example: A hotel proprietor interviewed in the survey may have said he felt NTOs benefited him / her. He or she may then have gone on to say that the end-user or customer – which we can interpret as being the paying guest – also benefits from NTOs. Such a response might imply that the proprietor’s perception was that NTOs would benefit him / her by contributing to improving business performance or the skills of employees, which in turn would improve the level of customer service provided to guests.

Given the wide remit of NTOs, any number of beneficiaries UK-wide might have been mentioned by employers when asked “Who do you think benefits from NTOs?”. QA coded up 23 types of response made by 1,244 interviewees, who collectively provided 1,293 open responses.

Table 8.1: Who benefits most from NTOs (summary table of responses)

Who benefits most from NTOs?	Number of responses	% of responses	Rank
Employers / businesses	386	30	1
Employees / individuals	384	30	2
No opinion / not sure	223	17	3
Young person / trainee / apprentice / next generation of workers	145	11	4
The industry	67	5	5
Everyone / society / general public	65	5	6
NTO	45	4	7
Customers / clients / end users	38	3	8
Larger companies	30	2	9
Trainers	18	1	10
Smaller companies	17	1	11
Government	16	1	12
Nobody	12	<1	13
Companies that need advice or training	10	<1	14=
Companies that do training	10	<1	14=
Students	10	<1	14=
Unemployed people	4	<1	17=
Contractors / agents	3	<1	18=
Other industries	2	<1	18=
Awarding Bodies	1	<1	20=
Companies without training facilities	1	<1	20=
Base number of responses	**1,286**	**100%**	

Base: 1,244 businesses making 1,286responses. This question allowed employers to make as many responses as they wished to (unprompted)

We went on to analyse the responses in a number of ways, and found responses analysed by industry grouping to be of most interest.

For example:

- Of the 386 interviewees that said businesses / employers benefited most from NTOs, 103 were from the manufacturing industry (27%). Proportionally though, the sector that was most likely to feel that businesses benefited most was wholesale and retail. Of the 144 businesses in this industry making a response, 56 felt that businesses benefited (39%).

- Of the 384 interviewees that said employees or individuals benefited most from NTOs, 71 were from businesses in the real estate / renting industry (18%). Again though we found that the wholesale and retail businesses were proportionally far more likely to have believed that employees benefited from NTOs with 64 out of 144 respondents stating this opinion (44%).

- Finance businesses were most likely to have no opinion about who benefits most from NTOs (19 out of 34 responding businesses in this industry).

- 37 out of 145 interviewees that said NTOs benefited trainees, young people or apprentices in the main were in the construction industry.

All the examples above have been shaded light grey within Table 8.2 for cross-referencing purposes. To help interpret each cell of information in Table 8.2 more easily, we have provided an example below corresponding to the blacked out box within Table 8.2 for reference:

Manuf-
Acturing

103 manufacturing interviewees said that
employers benefit most from NTOs

103
35%
27%

103 is 35% of the 293 total responses made by manufacturing interviewees

103 is 27% of the 386 interviewees from all industries who said employers benefit most from NTOs.

Further explanatory notes about Table 8.2:

The base is 1244 companies[16] that gave verbatim responses to the question “Who do you think benefits from NTOs?”. Base responses are provided at the bottom of each industry column or each row accordingly. Total responses given to this question after coding was 1,286. Interviewees could, and did, make more than one response. Percentages have been rounded up to integers to ease interpretation for the reader. As such, rows or columns sometimes appear to add up to just less or just more than 100%.

[16] 31 employers chose not to answer this question

Table 8.2: Who benefits most from NTOs – distribution of responses by industry

Industry	Primary sector	Manuf-Acturing	Const-ruction	Whole-sale/ retail/	Hotels/	Trans-port/ storage	Finance	Real estate/ renting	Educ/ Health/ Social*	Totals
Business / Employers	6 19% 1%	**103** **35%** 27%	64 35% 17%	56 **39%** 15%	37 29% 10%	19 27% 5%	4 12% 1%	52 26% 13%	45 22% 11%	386 30% 100%
Employees / individuals	8 26% 2%	69 24% 18%	45 25% 12%	64 **44%** 17%	50 39% 13%	17 24% 4%	3 8% 1%	71 35% **18%**	57 28% 15%	384 30% 100%
Everyone	3 10% 4%	0 - -	11 6% 17%	0 - -	17 13% 26%	5 7% 8%	2 6% 3%	10 5% 15%	17 8% 26%	65 5% 100%
NTO	2 6% 4%	15 5% 33%	16 9% 36%	2 1% 4%	1 1% 2%	1 1% 2%	0 - -	3 2% 7%	5 2% 11%	45 4% 100%
Young person / trainee / apprentice	5 16% 4%	22 8% 16%	37 20% **26%**	11 8% 8%	15 12% 11%	2 3% 1%	3 8% 2%	26 13% 18%	24 12% 17%	145 11% 100%
Companies that need advice or training	2 6% 20%	1 1% 10%	1 1% 10%	3 2% 30%	0 - -	0 - -	0 - -	0 - -	3 1% 30%	10 <1% 100%
The industry	2 6% 3%	26 9% 39%	14 8% 21%	6 4% 9%	4 3% 6%	4 5% 6%	1 3% 1%	9 4% 13%	1 1% 1%	67 5% 100%
Other industries	0 - -	0 - -	0 - -	0 - -	0 - -	1 1% 50%	0 - -	0 - -	1 1% 50%	2 <1% 100%
Larger companies	1 3% 3%	5 2% 17%	6 3% 20%	5 3% 17%	0 - -	4 5% 13%	0 - -	8 4% 27%	1 1% 3%	30 2% 100%
Smaller companies	1 3% 6%	3 1% 18%	3 2% 18%	1 1% 6%	1 1% 6%	1 1% 6%	0 - -	6 3% 35%	1 1% 6%	17 1% 100%
Trainers	1 3% 6%	4 1% 22%	0 - -	0 - -	0 - -	0 - -	1 3% 5%	3 1% 17%	9 4% 50%	18 1.4% 100%
No opinion / not sure	4 13% 2%	76 26% 34%	10 5% 4%	19 13% 9%	18 14% 8%	23 32% 10%	19 **56%** 9%	31 15% 14%	23 11% 10%	223 17% 100%
Nobody	0 - -	4 1% 33%	0 - -	2 1% 17%	0 - -	1 1% 8%	1 3% 8%	0 - -	4 2% 33%	12 <1% 100%
Students	0 - -	2 1% 20%	0 - -	0 - -	0 - -	1 1% 10%	0 - -	2 1% 20%	5 2% 50%	10 <1% 100%
Government	0 - -	1 1% 6%	3 2% 19%	1 1% 6%	1 1% 6%	2 3% 13%	0 - -	4 2% 25%	4 2% 25%	16 1% 100%
Companies that do training	0 - -	1 1% 10%	0 - -	0 - -	0 - -	0 - -	0 - -	3 1% 30%	6 3% 60%	10 <1% 100%
Customers / clients / end users	0 - -	3 1% 8%	3 2% 8%	6 4% 16%	3 2% 8%	0 - -	0 - -	5 2% 13%	18 9% 47%	38 3% 100%
Unemployed people	0 - -	0 - -	0 - -	0 - -	1 1% 25%	0 - -	0 - -	1 1% 25%	2 1% 50%	4 <1% 100%
Contractors / agents	0 - -	0 - -	0 - -	0 - -	0 - -	1 1% 33%	0 - -	1 1% 33%	1 1% 33%	3 <1% 100%
Awarding Bodies	0 - -	0 - -	0 - -	0 - -	0 - -	0 - -	0 - -	0 - -	1 1% 100%	1 <1% 100%
Companies without training facilities	0 - -	0 - -	0 - -	0 - -	1 1% 100%	0 - -	0 - -	0 - -	0 - -	1 <1% 100%
Base number of respondents	30	271	176	138	124	70	32	197	206	1,244
Base number of responses	31	293	182	144	128	72	34	201	**208**	**1,286**

Base: 1,244 businesses making 1,286 responses

This question allowed employers to make as many responses as they wished to (unprompted)

(2) How do you think NTOs should be funded?

Context

"NTOs are employer owned and funded bodies dedicated to meeting the current and future skill needs of their employment sectors." All NTOs have been recognised by Government, and in the main receive a significant proportion of their funding from sponsoring Government Departments such as the DfEE, DTI and MAFF. A small number of NTOs, such as CITB and ECITB operate a levy system where employers have to contribute. Other NTOs encourage paid memberships, whilst another revenue stream to support specific projects is external funding such as ADAPT, Objective 4 or other European funding.

Employer Perceptions in the 1999 Survey

At no point in this survey were interviewees told how NTOs were funded, and so any response provided by employers was based on their own perception or actual knowledge of how NTOs were funded. Robust themes were recorded and most employers felt that Central Government should be the main, if not sole source of funding for NTOs. 884 employers out of the unweighted sample of 1,551 employers asked this question made mention of the word Government, Central Government or State. This represents **57%** of all verbatim responses made by interviewees. 25% did not know how NTOs should be funded, and preferred to make it plain that they simply could not say or had no idea about this. A further 3% said they held no opinion about how NTOs should be funded.

The remaining 15% of responses comprised mainly opinions that businesses ought to contribute, or that NTOs should be funded through the payment of a levy (5%). But it would be an injustice to report on opinions in so crude a fashion, when in fact there was some opinion that NTOs should be funded through a range of contributions. For example, 13% of respondents said words to the effect that Government and Industry or employers ought to contribute jointly to funding NTOs.

Table 8.3 How should NTOs be funded?

Unprompted response	Number of responses
Government (solely)	884
Don't know / can't say / no idea	391
Business themselves	22
Combination of Government and business or Government and industry	202
Levy	78
Not sure / no opinion	47
Users of NTO services / fees from services provided	39
Other combinations / mixture of sources	33
Local authorities	22
Self-funding	11
Lottery or Europe	8
Memberships / subscriptions	8
Larger companies only	5
Colleges or universities	3

Base: 1,551 employers (unweighted)
The shaded row is a sub-set of responses already accounted for by those saying "Government" (solely) and "Business themselves".

Whilst employers tended to give one-word or short phrase answers to this question of who should fund NTOs, a small selection of the more colourful quotations has been selected to convey some of the responses recorded. They are therefore in no way representative of opinion as a whole, rather provide interesting viewpoints to consider:

Table 8.4 How should NTOs be funded (employer perceptions)?

Employers' Perceptions of how NTOs should be funded	Selective Quotations
Combination funding	*"Should be a combination of employers, local and central government."* *"Government, levy and trainees."* *"Government, maybe sponsored by the catering industry 50:50."* *"If there is a serious commitment, funding will come from Government and income generated by the services the NTO provides."* *"The largest percentage from Government with a contribution from employers."*
Service users and NTO self-funding	*"Companies should finance the training courses supported by funding from Government."* *"Self-supporting, with NTOs charging for training."*
Change of funding over time	"Depends on what service NTOs are providing. Initially Government, later perhaps a levy on the businesses?"
Employer contribution	*"If reasonable, companies would contribute to a compulsory levy, because private training companies are so expensive."* *"Part national pot for CITB to draw upon and employers to pay as you go."* *"Funded by members. I think this is only right."* *"Larger companies can afford to fund it. Smaller companies can't."*
Role dependent funding	*"Industry if it is profit-making. Government if it is not."*

In this baseline survey of employers' views of NTOs, this question is of limited meaningful usage until a real understanding of how NTOs are funded is in place generally amongst businesses. However, we did feel it worth focusing in upon the responses made by those businesses currently having to pay a levy to establish their opinions about this nature of funding. These tended to be in the construction industry (CITB). These selective quotations perhaps help to convey attitudes towards levies for funding NTOs:

Table 8.5 Attitudes towards levies (employer perceptions)?

Employers' Perceptions of how NTOs should be funded	Selective Quotations
Positive aspects	*"I'm happy with the current grant and levy system"* *"The levy is OK, but as long as it is truly across the board and with more Government funding."*
Negative feedback	*"Not happy that the levy system is the best way to operate."* *"More government and less levy."* *"Levy – we have no choice."*
Improvements	*"The grant and levy system is OK, but there's not enough opportunity to get the grants back!"* *"Levy, BUT split the costs at the end of the year."*

(3) Business Issues for the Next 12 Months

Context – The Value of NTOs compared to business needs

In IRB Research's 1999 study for the Central Office of Information, 250 employer respondents (with more than 50 employees) were asked a series of questions that would help identify the perceived importance of NTOs to their business. **11% of employers thought that NTOs could be extremely valuable** in meeting their firm's needs and 54% thought they could be quite valuable. The most important service or role that an NTO could offer to businesses was information on new training courses and keeping employers abreast of industry developments. The 1999 Employer Survey builds significantly on this area of questioning to determine more robustly how NTOs relate to their own stated business needs and priorities, and the extent to which NTOs might be able to assist.

National Skills Task Force – 3rd Report

The third report produced by the National Skills Task Force made a number of references and recommendations to do with NTOs. Recommendation 11 stated that an annual workplace training audit should be organised by the DfEE, building on and extending existing data from the Labour Force Survey and NTOs, to provide an authoritative method of monitoring progress in raising the skills of the adult workforce over time. The recommendations made proposed important roles for NTOs particularly in helping to deliver an effective learning information service for industry. They would also need to play their part in monitoring and driving progress in their sectors, in identifying and spreading good practice, and in assisting the Learning and Skills Council in the *assessment of skill needs* and in the preparation of workforce development strategies. The 1999 Employer Survey helps perhaps to inform these initiatives in that it has identified business' core needs and issues for the coming 12 months.

1,275 employers were asked what were the main business issues for them in the coming 12 months. As well as recording unprompted responses, the Department also wished specifically to know what proportion of businesses had issues relating to skill shortages, improving information technology, keeping up with the competition and improving business practices.

Table 8.1 Business Issues for employers in the next 12 months

Main Business Issue for 1999 / 2000	Number of businesses	% of aware businesses	Rank
Improving business practices	476	37	1
Keeping up with competition	439	34	2
Skills shortages	415	33	3
Improving Information Technology	356	28	4
Base	-	1,275	

Base: 1,275 is the number of "aware" businesses who had opportunity to answer this question.

The greatest business need amongst this sample of businesses was improving business practices, although clearly each of the four stated issues were all relatively important to businesses. Looking at each issue in turn, we will examine the profile of businesses that stated a business priority, and look at what proportion and type of employers felt NTOs might be able to assist with this problem.

Table 8.2 Improving Business Practices

Main Business Issue for next 12 months	Number of businesses with this issue	Industry profile	No. with need	No. saying NTO could help	Size	No. with need	No. saying NTO could help	Businesses that believe NTOs could help
Improving business practices	**476 out of 1,275 respondents (37%)**	Primary	8	8	1-9	435	175	**193 out of 476 with this need (41%)**
		Man.	51	15				
		Con.	91	29	10-49	32	13	
		Whole.	50	29				
		Hotels	35	23	50-199	6	3	
		Trans.	15	7				
		Finance	3	3	200-499	2	1	
		Real est.	99	14				
		Educ. / Health / Social	124	66	500+	1	1	
Totals			476	193		476	193	

Base: 1,275 is the number of "aware" businesses who had opportunity to answer this question. 476 is no. of businesses with this issue.

476 businesses said improving business practices would be an issue for 1999 / 2000 of which 193 said NTOs could help. 34% of these 193 businesses were from the education, social or health industries and 15% were in wholesale / retail industries.

Table 8.3 Keeping up with competition

Main Business Issue for next 12 months	Number of businesses with this issue	Industry profile	No. with need	No. saying NTO could help	Size	No. with need	No. saying NTO could help	Businesses that believe NTOs could help
Keeping up with competition	**439** out of 1,275 respondents (34%)	Primary	8	8	1-9	402	167	**184** out of 439 with this need (42%)
		Man.	56	15				
		Con.	110	29	10-49	28	13	
		Whole.	50	34				
		Hotels	34	25	50-199	5	2	
		Trans.	15	9				
		Finance	6	3	200-499	2	1	
		Real est.	86	14				
		Educ. / Health / Social	73	47	500+	1	1	
Totals			439	184		439	184	

Base: 1,275 is the number of "aware" businesses who had opportunity to answer this question. 439 is no. of businesses with this issue.

439 businesses said keeping up with the competition would be an issue for 1999 /2000 of which 184 said NTOs could help. 25% of these 184 businesses were from the education, social or health industries and 19% were in wholesale / retail industries.

Table 8.4 Skills Shortages

Main Business Issue for next 12 months	Number of businesses with this issue	Industry profile	No. with need	No. saying NTO could help	Size	No. with need	No. saying NTO could help	Businesses that believe NTOs could help
Skills Shortages	**415** out of 1,275 respondents (33%)	Primary	8	0	1-9	385	187	**205** out of 415 with this need (49%)
		Man.	29	15				
		Con.	153	81	10-49	23	13	
		Whole.	30	22				
		Hotels	16	10	50-199	5	3	
		Trans.	8	3				
		Finance	6	3	200-499	1	1	
		Real est.	58	16				

		Educ. / Health / Social	108	55	500+	1	1	
Totals			415	205		415	205	

Base: 1,275 is the number of “aware” businesses who had opportunity to answer this question. 415 is no. of businesses with this issue.

415 businesses said skill shortages would be an issue for 1999 / 2000, of which 205 said NTOs could help. Businesses particularly in construction, wholesale / retail, manufacturing and education, social or health industries were most likely to have believed NTOs could help. 92% of businesses that felt NTOs could help employed less than 10 people.

Table 8.5 Improving Information Technology

Main Business Issue for next 12 months	Number of businesses with this issue	Industry profile	No. with need	No. saying NTO could help	Size	No. with need	No. saying NTO could help	Businesses that believe NTOs could help
Improving Information Technology	**356** out of 1,275 respondents (28%)	Primary	8	0	1-9	326	174	**191** out of 356 with this need (54%)
		Man.	26	6				
		Con.	88	36	10-49	23	13	
		Whole.	32	24				
		Hotels	13	12	50-199	4	2	
		Trans.	14	7				
		Finance	12	6	200-499	1	1	
		Real est.	78	29				
		Educ. / Health / Social	86	71	500+	1	1	
Totals			356	191		356	191	

Base: 1,275 is the number of “aware” businesses who had opportunity to answer this question. 356 is no. of businesses with this issue.

356 businesses said improving IT would be an issue for 1999 / 2000 of which 191 said NTOs could help. Just over a third (37%) of these 191 businesses were in the education, social or health industries.

Table 8.6 Summary Table - Could NTOs help with main business issues?

Main Business Issue for 1999 / 2000	Number of businesses with issue	Number of businesses saying NTO could help	% of businesses saying NTO could help
Improving business practices	476	193	41
Keeping up with competition	439	184	42
Skills shortages	415	205	49
Improving Information Technology	356	191	54
Base		1,275	Varies per statement

Base: 1,275 is the number of “aware” businesses who had opportunity to answer this question.

The summary table 8.6 helps to highlight that whilst improving business practices and keeping up with the competition were stated as the two greatest business issues in 1999/2000 for this sample of employers (37% and 34% respectively), only four in every ten employers with those needs felt NTOs might be able to assist. Conversely, skills shortages and improving IT, which were seen as key issues by 33% and 28% of employers respectively, are issues that employers perceive NTOs could perhaps more readily assist with. In fact nearly a half of all employers with skills shortages issues felt NTOs could assist, and over a half with improving IT as an issue felt NTOs could help.

Why don't more employers contact NTOs if they believe they can assist?

What is fascinating is that when we looked at communication by employers with NTOs in Chapter 6, we presented the finding that only **12%** of aware businesses had contacted their NTO in the past 12 months. And yet, when we ask the same sample of aware employers to think about their priority business needs for the coming year, we find that between **14%**[17] and **16%**[18] stated that an NTO could assist them. Does this imply latent demand for NTO services, but a less than proactive behaviour by employers to do anything about it?

Other business issues

There were many other business issues described by employers as important for them in the next 12 months. In fact over 25 types of issue were described. 306 employers (including a proportion of those that had already stated NTOs might help with issues such as IT or skills shortages) said they felt NTOs could assist with a range of issues, though often the percentages expressing this sentiment were very small. The sorts of issues where employers felt NTOs could assist included most notably training (57), NVQ / SVQ development or implementation (19), health and safety issues (16) or general development of their business (15). Other areas where NTOs might assist included: recruitment (14), quality issues (14), IiP (10), key skills (10), funding (8), staff retention (7) and increasing sales (6).

(4) Awareness of other Initiatives

In order to establish awareness of other organisations and initiatives, interviewers asked employers whether they had heard of Individual Learning Accounts, University for Industry, Regional Development Agencies and Education Business Partnerships.

Table 8.7 Awareness of other organisations and initiatives

Organisation	Number of businesses that have heard of …	% of 1,275 businesses asked the question
RDA	819	64
EBP	521	41
UfI	331	26
ILAs	158	12
Base	1,275	1,275

Base: 1,275 businesses that had already demonstrated awareness of NTOs.
Relates to question 5.4: "Have you heard of the following organisations?"
Data has been weighted to be representative of the UK business population

Each initiative described in Table 8.7 has of course its own specific remit and objective, but in a practical sense there is overlap in some of their activities with NTOs. Furthermore, there is the potential that businesses may ultimately hold confused or blurred perceptions of what exactly each initiative is about, and whether the NTO function is distinct. Table 8.7 presents the findings of the responses made by the 1,275 businesses asked this question.

[17] 439 businesses out of 1,275 stated keeping up with the competition as a core business issues for 1999/2000. Of these 439 businesses, 184 stated that an NTO might be able to help. 184 is 14% of 1,275.
[18] 415 businesses out of 1,275 stated that skills shortages were an issue for the next 12 months. Of these 415 businesses, 205 stated that an NTO might be able to help. 205 is 16% of 1,275.

(5) Likelihood of contacting NTOs in the next year

Finally, we asked employers how likely they would be to contact their NTO during the past 12 months.

Table 8.8 Likelihood of contacting an NTO in 1999 / 2000

Likelihood of contacting an NTO	Number of businesses	% of 1,275 businesses asked
Very likely	65	5
Quite likely	136	11
Quite unlikely	112	9
Very unlikely	758	59
Not sure / can't say	205	16
Base	1,275	

Base: NTO aware employers 1,275. Relates to question 5.5a: "How likely is it that you will contact an NTO in the next 12 months?". Data has been weighted to be representative of the UK business population

59% of all businesses aware of NTOs would be very unlikely to contact their NTO in the next 12 months. An additional 9% were quite unlikely to contact an NTO in 1999 / 2000. Together this implies that almost seven in every ten employers, aware of NTOs are quite or very unlikely to get in touch with their NTO in 1999 / 2000. Is this an indication of what proportion of businesses find NTOs to be of value to them, or is it simply an indication that understanding of NTO function is low at present and hence relatively little value attached to them?

On the positive side, 16% of businesses aware of NTOs are very or quite likely to contact their NTO in the next 12 months which is +4% more than have contacted an NTO in the past 12 months (see Chapter 6 baseline for employer contact with NTOs – 12%). A similar proportion of businesses simply could not say whether they were likely to contact an NTO or not.

Profile of those businesses <u>unlikely</u> to contact their NTO

- 59% of businesses that had initially demonstrated unprompted awareness of NTOs when only given trigger words such as "training" or "skills" were quite or very unlikely to contact their NTO in 1999 / 2000.

- 70% of all businesses that had demonstrated prompted awareness of NTOs were quite or very unlikely to contact their NTO.

- 71% of all construction businesses aware of NTOs were not likely to contact their NTO in the next 12 months. Proportionally though by industry, this is lower than respective groupings of employers in hotels (81%), transport and storage (81%), real estate and renting (74%) and wholesale / retail (72%).

- 79% of all businesses in Wales that were aware of NTOs were quite or very unlikely to make contact compared to 68% of all aware English businesses, 60% of all aware Scottish businesses and 56% of all aware Northern Ireland businesses.

- 69% of all micro-businesses, aware of NTOs, were unlikely to contact NTOs compared to 63% of businesses employing 10-49 people, 57% of businesses employing 50-199 people, 46% of businesses employing 200-499 people and 44% of businesses employing more than 500 people.

Profile of those businesses quite or very likely to contact their NTO in 1999 / 2000

- Proportionally, the largest group of businesses that were very likely to contact their NTO belonged in the primary sector with 12% of all businesses aware of NTOs stating this behaviour. However, when we aggregate data for all businesses saying either "very" or "quite" likely to contact NTOs the largest group proportionally would be construction (22%), followed by education, health and social businesses (17%) and manufacturing businesses (17%).

- 35% of all businesses in Northern Ireland, aware of NTOs were very or quite likely to contact their NTO in 1999 / 2000 compared to 22% of all aware Scottish businesses, 16% of aware Welsh businesses and 15% of aware English businesses. Of the English regions, strangely businesses in Merseyside were most likely to contact an NTO in the next 12 months with 35% (of a relatively small sample) stating they would make contact. 27% of all businesses aware of NTOs based in the North East were also quite or very likely to make contact with their respective NTOs.

- Larger businesses were more likely to make contact with an NTO in 1999 / 2000. For example, 33% of all businesses employing more than 500 people, aware of NTOs were quite or very likely to communicate with an NTO in the next 12 months. This compares with our finding that 15% of micro businesses, aware of NTOs, were likely to make contact.

Chapter 11: Appendices

Department for Education and Employment (DfEE)

Survey of Employers' Views of
National Training Organisations (NTOs)

Merged information from the Business Database to check. **Interviewer to code:**

Contact Name: *

Position: *

Business name: *
Address line 1: *
Address line 2: *
Address line 3: *
Post Town: *
County: * Region: |___|___|
Post Code: *

Telephone: *

SIC Code: 4 digit: * 5 digit: |___|___|___|___|___|

Employee Size Band: *

(A) 1-9 ❒
(B) 10-49 ❒
(C) 50-199 ❒
(D) 200-499 ❒
(E) 500+ ❒

QUESTION 2.2 PROMPT: Representative NTO(s)

Primary NTO *
Secondary NTO *
Tertiary NTO *

………

QUESTION 2.4 PROMPT: Representative Lead Body / ITO / Previous organisation
1 *
2 *
3 *
4 *

………

OUTCOME (Code one only)

01 02 03 04 05 06 07 08 09 10 00

No.	Date	Time	Spoke to	Outcome
1				
2				
3				

Start Time …………………………….. Interviewer: …………………… QC |___|___| BC |___|___|

ASK TELEPHONIST

S1	Can I just check, is that (COMPANY)?	Yes	1	SKIP TO S1.2
		No	2	GO TO S1.1

IF COMPANY NAME DIFFERENT

S1.1 Enter correct company name and CLOSE

____

S1.2 Can I just check that your postcode is (POSTCODE)?

Yes	1	SKIP TO S2
No	2	GO TO S1.3

S1.3 What is the correct postcode? (ENTER)

____

S2. FOR COMPANIES WITH LESS THAN 50 EMPLOYEES ASK:
May I please speak to the owner / manager or person most responsible for staffing and training at this location?

FOR COMPANIES WITH 50 OR MORE EMPLOYEES ASK:
May I please speak to the Human Resource / Personnel Manager or person most responsible for staffing and training at this location?

OFFER EXPLANATION OF PURPOSE OF CALL IF NECESSARY

Wait to be put through	SKIP TO S4
Person based elsewhere	SKIP TO S3
No such person	CLOSE
Refused to put through	CLOSE
Call back later	MAKE APPT.

S3. Can you give me the details of the person I need to speak to?

Name __________________________ Job Title __________________________

Company ____

Tel no __________________________ CLOSE

ASK ALL

S4 Good morning/afternoon, my name is............. and I am calling from Questions Answered Ltd. We are conducting a major study for the Department for Education and Employment about **training and skills** and how your type of business sector is represented in this respect. The results of every survey will be used to help develop policies at both a national and regional level. Participation is entirely voluntary and no responses will be attributed to any individual or company. Results will be reported to the Department for Education and Employment on an aggregated basis only. The interview will take between 5 and 15 minutes. Would you like to participate in the survey?

Yes, now	1	CONTINUE
Yes, later	2	MAKE APPT
No	3	THANK AND CLOSE

IF NECESSARY ADD: either Alan Graver or Anthony Gray at Questions Answered on 01904 632039 or Peter Weller at the DfEE on 0114 259 3732. A summary of the results of this survey will be available on request from the DfEE in May 2000.

SCREENER

1 UNPROMPTED AWARENESS – FIRST PORT OF CALL FOR TRAINING

1.1 If you wanted information about anything to do with training and skills for your type of business locally who would you contact? (UNPROMPTED. CODE ALL MENTIONED)

1.2 If you wanted information about anything to do with training and skills regionally for your type of business who would you contact? (UNPROMPTED. CODE ALL MENTIONED)

1.3 If you wanted information about anything to do with training and skills nationally for your type of business who would you contact? (UNPROMPTED. CODE ALL MENTIONED)

	1.1 Local	1.2 Regional	1.3 National
FE College	1	1	1
Training and Enterprise Council	2	2	2
Chamber of Commerce	3	3	3
Jobcentre	4	4	4
Recruitment Agency	5	5	5
Business Link	6	6	6
Careers Service	7	7	7
Regional Development Agency (RDA)	8	8	8
Government Office	9	9	9
Local Authority	10	10	10
Higher Education Institution	11	11	11
Trade Association	12	12	12
National Training Organisation	13	13	13 (if mentioned skip to 2.2)
Industry Training Organisation	14	14	14
Group Training Associations	15	15	15
Press or journals	16	16	16
Trade Association / Professional Body	17	17	17
In-house / Head Office	18	18	18
Private training company	19	19	19
Other	20	20	20

WRITE IN: …………………….. ……………………… ………………………..

1.4 What organisations in your sector or industry provide advice on training and skills (other than any mentioned already)?

WRITE IN: ……………………………………………………………………………………………

2 PROMPTED AWARENESS OF NTOs AND ITOs

2.1 Have you heard of National Training Organisations or NTOs?

Yes	1	CONTINUE
No	2	CONTINUE

2.2 Have you heard of your industry's National Training Organisation?
REFER TO FRONT PAGE AND PROMPT FOR REPRESENTATIVE NTO/s (FRONT SHEET)

Yes	1	SKIP TO 3.1
No	2	CONTINUE

ASK NEXT QUESTION 2.3 ONLY IF THE RESPONDENT HAS NOT HEARD OF NTOs at 2.1 or 2.2

2.3 Have you heard of Industry Training Organisations (ITOs) or Lead Bodies (LBs)?

Yes	1	CONTINUE
No	2	CONTINUE

2.4 Have you heard of your industry's ITO / LB ?
REFER TO FRONT PAGE AND PROMPT FOR NAMED ITO OR LEAD BODY (FRONT SHEET)

Yes	1	CONTINUE
No	2	CONTINUE

➲ if the interviewee has shown consistent non-awareness from 2.1 to 2.4 go to Section 6 - classificatory questions.

➲ if the interviewee has shown any awareness between 2.1 and 2.4 please continue with the rest of the survey.

3. UNDERSTANDING OF NTOs' REMIT

3.1 What do you think or understand to be the role of National Training Organisations?
WRITE IN UNPROMPTED VERBATIM AND CODE ALL MENTIONED AFTERWARDS.

VERBATIM

……….

……….

have heard of but no understanding ❒ 1 SKIP TO 4.1

3.2 Which of the following do you think National Training Organisations are responsible for?
(READ OUT AND CODE ALL MENTIONED)

	Encouraging employers to train their workforce	1	
☠	To inspect training at employers' own premises		2
	To represent employers' views on education and training and ensure that they are heard By Government	3	
	To influence education and training providers to offer relevant courses and qualifications		4
	Improve links between industry, schools, further education and higher education	5	
☠	To provide teacher training		6
	Designing the procedures for training new entrants to the industry, such as apprentices	7	
	Helping to develop National Occupational Standards		8
	Bringing employers together to say what skills are needed now and in the future in their industries		9
	Promoting initiatives like Investors in People and NVQs		10

4. INVOLVEMENT AND CONTACT WITH NTOs

4.1 Have you contacted a / your NTO / ITO / LB / ALL SECTOR NTO in the last 12 months?

Yes	1	CONTINUE
No	2	SKIP TO 4.5

4.2 Which of these types of advice or service have you contacted an NTO / ITO / LB about in the last 12 months?

READ OUT. TICK ALL CONTACTED. ASK IF USED. TICK ALL USED. THEN ASK INTERVIEWEE TO RATE LEVEL OF SATISFACTION WITH ADVICE/INFORMATION USED. SCORE 1-6 WHERE 1 = VERY DISSATISFIED, 2=DISSATISFIED, 3=NEITHER, 4=SATISFIED, 5=VERY SATISFIED, 6 = CAN'T SAY.

	READ OUT AND TICK ALL MENTIONED.	CONTACTED	LEVEL OF SATISFACTION ← 1 - 5 →					can't say
A	To obtain funding for training		1	2	3	4	5	6
B	To obtain advice / information on recruitment		1	2	3	4	5	6
C	To establish the availability of training courses		1	2	3	4	5	6
D	To develop training techniques		1	2	3	4	5	6
E	To obtain advice / information on BS5750 / ISO9000 / IiP		1	2	3	4	5	6
F	To get advice / information on Modern Apprenticeships		1	2	3	4	5	6
G	To get advice / information on National Traineeships		1	2	3	4	5	6
H	To get advice / information on NVQs or SVQs		1	2	3	4	5	6
I	To get information about the skills needs of your industry		1	2	3	4	5	6
J	Off-the-job training		1	2	3	4	5	6
K	Other		1	2	3	4	5	6

➔ IF NO ADVICE / SERVICES HAVE BEEN USED SKIP TO 4.5

➔ FOR THOSE WHO HAVE USED ANY OF THE SERVICES / INFORMATION ABOVE ASK 4.3 & 4.4

4.3 What specific NTO information, advice or service used has had the biggest impact?

CODE FROM ABOVE: A B C D E F G H I J K

Why / in what way? …………………………………..……………………………………………………………….

4.4 Would you recommend using an NTO to other employers?

Yes	1	CONTINUE
No	2	CONTINUE

ASK ALL

4.5 Has your organisation been sent an NTO questionnaire or asked to respond to an NTO survey (other than this present survey)?

Yes	1	And did you respond?	❑ (tick if yes)
No	2	CONTINUE	

4.6 Have you personally or have any of your employees been involved with an NTO in any of the following ways? READ OUT. CODE ALL MENTIONED

On a steering group	1	CONTINUE
On a committee	2	CONTINUE
On a working group	3	CONTINUE
Other	4	CONTINUE
None of the above	5	<u>SKIP TO 4.9</u>

4.7 How well do you feel that your NTO is raising awareness of its activities with employers in the sectors it is meant to represent?

Very well	1
Quite well	2
Not very well	3
Not at all well	4
Can't say	5
Other	6

4.8 Why do you think this? WRITE IN UNPROMPTED VERBATIM

VERBATIM ……………………………………………………………………………………………………….

4.9 Have you been contacted by your NTO / ITO in the last 12 months?

Yes	1	CONTINUE
No	2	CONTINUE AT 4.10b

4.10 (a) How were you contacted? (READ OUT. CODE ALL MENTIONED
(b) How would you generally like to be contacted by an NTO? (READ OUT. CODE ALL MENTIONED
(c) What style of communication do you prefer on "training or skills" issues? (READ OUT. CODE ALL MENTIONED

	(a)	(b)	(c)
Telephone	1	1	1
Mail shot / letter	2	2	2
E-mail / website / internet	3	3	3
NTO event (seminar / workshop / conference)	4	4	4
Local business or network meeting	5	5	5
Visited by an NTO	6	6	6
Fax	7	7	7
Other (please state) …………………………	8	8	8

5. ATTITUDES AND MISCELLANEOUS AWARENESS

5.1a Who do you think benefits most from National Training Organisations?

……

5.1b Why?

……

5.2 (a) Thinking about the next 12 months, what are the main issues for your organisation?
(NO PROMPT. CODE ALL RESPONSES) (b) and could an NTO provide assistance with any of these issues?

(NO PROMPT. CODE ALL RESPONSES)

	will be an issue	NTO could help
Trying to cover skill shortages	❐ 1	❐ 1
Introducing or trying to improve the use of IT	❐ 2	❐ 2
Keeping up with competition	❐ 3	❐ 3
Improving business practices	❐ 4	❐ 4
Issue …………………………………………………………	❐ 5	❐ 5
Issue …………………………………………………………	❐ 6	❐ 6
Issue …………………………………………………………	❐ 7	❐ 7

(c) Will any of the following be an issue for your business over the next 12 months? (READ OUT. CODE ALL MENTIONED) (d) and do you believe that an NTO could provide assistance with any of these issues?

(PROMPT. CODE ALL MENTIONED)

	will be an issue	NTO could help
Trying to cover skill shortages	❐ 1	❐ 1
Introducing or trying to improve the use of IT	❐ 2	❐ 2
Keeping up with competition	❐ 3	❐ 3
Improving business practices	❐ 4	❐ 4

5.3 How do you think NTOs should be funded?

……

5.4 Have you heard of…
READ OUT. RECORD ALL MENTIONED

Individual Learning Accounts	1
University for Industry	2
Regional Development Agencies	3
Education Business Partnerships	4

5.5a How likely are you to contact your NTO in the next 12 months?

Very likely ❐ 1 go to 5.5b Quite Likely ❐ 2 go to 5.5b Quite unlikely ❐ 3 Very unlikely ❐ 4 Not sure ❐ 5

5.5(b) Why do you think you might contact your NTO?

……

6 CLASSIFICATORY QUESTIONS

6.1 Could you describe your main business activity?
RECORD AND SIC CODE 5 DIGIT AFTERWARDS

____

6.2 How many employees do you have at this location including yourself?

1-9 1

10-49	2
50-199	3
200-499	4
500+	5

6.3 Is your firm…. A single site company 1
A multi site company 2

6.4 Is your site The headquarters 1
Regional head office 2
Other site 3

6.5 Is your business part of the…. Private sector 1
Public sector 2

6.4 Are you committed to or already recognised as an Investor in People?

Recognised 1 Committed 2 Neither 3

6.5 Has your company achieved a standard such as BS5750 or ISO9000?

BS5750 1 ISO9000 2 Other 3 None 4

6.6 Is your company a member of any professional industry or trade associations?

Yes 1 (WRITE IN): ______________________________
No 2

6.7 Do you have a training plan? Yes 1 No 2

6.8 Do you have a training budget? Yes 1 No 2

7 INFORMATION

7.1 Are there any other comments you would like to make about NTOs or training in your sector?

…….

…….

The DfEE has asked us to read out this short statement about NTOs. (READ OUT TO ALL)

National Training Organisations are independent industry bodies established to identify current and future training needs for their sector. They are recognised by Government as industry's voice on education and training. Their task is to liase with employers to determine what an industry's business need are in this area. They identify what skills are required and how they can be achieved.

7.2 Finally, would you like any general information about NTOs? Record in the box below if yes.

Would like information to be sent ❑ (tick if yes)

7.3 As part of our quality checking procedure may I ask whether you have been satisfied with the way in which this interview has been conducted?

Yes	1
No	2

Any feedback re interview: ……………………………………………………………………………………….

THANK AND CLOSE.

Example letter sent to NTO Chief Executives prior to the fieldwork commencing.

5th August 1999

(Contact Name)
Chief Executive
(NTO)
(Address)

Dear (Chief Executive's Name),

DfEE STUDY: EMPLOYERS' VIEWS OF NTOs, 1999

The Department for Education and Employment has commissioned Questions Answered Ltd (QA) to undertake a national survey of employers in order to establish levels of awareness and understanding of National Training Organisations. It is anticipated that the survey could be repeated annually to update on core questions.

QA wished to ensure that NTOs were made aware of this study and would like to invite your expert research suggestions to inform the project. The DfEE approved method will require our research team to:

- Obtain contact details for around 9,000 employers broadly representative of UK establishments including zero size site level interviews
- Complete around 3,500 employer interviews in a six-week period during September and October 1999 comprising a mix of aware and unaware establishments
- Devise a questionnaire that allows for unprompted and prompted awareness of NTOs, or in some cases, previously known ITOs, Lead Bodies etc.
- Obtain information from those who are aware of NTOs regarding contact with and use of NTO services
- Process all data and provide a full report to the DfEE in February / March 2000.

A pilot survey with employers will be taking place in late August so your views and opinions as to how to get the most out of this study are welcomed prior to then. It is hoped that ultimately there will be the opportunity to disseminate the findings of this study to NTOs using its Research Forum Network meetings if this idea is welcomed. If you would like to discuss the project with any of QA's research team managers please don't hesitate to contact Anthony Gray, Carl Letman or myself on 01904 632039. Alternatively, please contact Peter Weller at DfEE on 0114 259 3732. We believe this study has the potential to become a useful yardstick for NTOs and as such we welcome your input. Thanks.

Yours sincerely

Alan Graver
Director of Business Development
Questions Answered Ltd.