LANTRA

UK Fencing Industry: Labour Market Information Research

December 2010

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Acknowledgements

Lantra would like to acknowledge the support of a wide range of representatives from industry for their participation in, and support of, this research. Lantra is pleased to record its deep appreciation to all those who have given time to considering and discussing the fencing industry and its needs as well as commenting on earlier drafts.

Lantra would like to thank employers who completed the telephone survey and those who took part in the focus groups. Additionally, thanks to Pye Tait for conducting the telephone surveys with employers and to Lantra's research team for their input into the study.

The project team at Lantra included: Kate McCarthy; Kevin Thomas; Ros Burnley and Tom Kingstone.

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The following report provides an up-to-date overview of the UK fencing industry. The fencing industry is one of a range of industries within the Land-based and Environmental sector footprint, as defined under the Lantra remit.

The evidence provided within this report is based primarily upon a comprehensive Fencing Labour Market Information (LMI) telephone survey of 450 fencing businesses, which was conducted in November 2009 by Pye Tait consulting. A robust sample size was achieved for the fencing industry at the UK level and for England. Results for Scotland, Wales and Northern Ireland are indicative.

Industry characteristics

The UK fencing industry is comprised of around 3,150 fencing businesses; the majority of which are located in England, with the highest proportion in the South East region. There are estimated to be 27,000 workers employed in the industry. The industry is dominated by micro businesses (those that employ fewer than ten people); these account for around 85% of businesses. The majority of businesses operate in the residential fencing sub-industry; although two-thirds of businesses operate across at least two sub-industries.

Around three in ten businesses generated turnovers in excess of £250,000 in the last 12 months. Just under half of UK fencing businesses reported their turnover to have decreased in the last 12 months. The ‘economic conditions’ were reported as the major challenge facing the industry in the coming year.

The fencing industry employs a younger workforce than that of the Land-based and Environmental sector as a whole. Three in ten workers are over the age of 45, compared to nearer five in ten across the wider Lantra sector. The industry’s workforce is predominantly in full time employment (92%), male (83%) and identify themselves as from a white ethnic group (97%).

Employment is concentrated in skilled trade and fence installer occupations; the two account for 45% of all employment. Workers within manager (18%) and elementary occupation (16%) levels also figure highly.

Recruitment and skills challenges

The UK fencing industry workforce numbers have declined in the past 12 months with a decrease of around five percentage points on current numbers. Businesses reporting to have employment vacancies are low; only 2% of businesses have a vacancy. Around half of the vacancies that do exist are reported to be hard to fill; this is largely due to a lack of interest from prospective applicants.

Around six in ten employers reported that when looking for new recruits they found problems identifying people with the right skills. However, skill gaps remain low within the UK fencing workforce; 97% of businesses reported that their current staff had the skills required to perform proficiently in their role. Of the few businesses that did report skill gaps, skills found to be lacking most often in staff were technical and job-specific skills.

The main reason attributed by employers for skill gaps amongst their workforce is a lack of experience and the most frequently cited impact of skills gaps was an increased workload for other staff members.

Training activity and development

Around 40% of the UK fencing workforce has received some form of training within the previous 12 months; the average number of training days received per employee was 4.5 days in the past 12 months and 76% of businesses stated that the number of training days per staff member was between one and five.

64% of businesses reported that a lack of funds or training being too expensive was the barrier preventing them from arranging more training. 19% felt that a lack of knowledge surrounding viable courses prevented them arranging more training.

The most common mode of training arranged was off the job training courses (60% of businesses arranged these for staff members). Second to this was on the job supervision, reported to have been arranged by 54% of training businesses.

Currently, Apprenticeship take up within the sector is low, however 31% of employers indicated that they would consider offering an Apprenticeship in the future.

Of those who did not offer an Apprenticeship, a ‘lack of knowledge’ was commonly reported as the main reason for this. Looking ahead, the most frequently reported future skills needed are vehicle/machinery/tool use (e.g. forklift truck driving, chainsaw operation).

This report shows that the fencing industry is a highly skilled industry with low levels of skills gaps associated to those employed within the sector. The fencing industry has a well established accredited card scheme, Fencing Industry Skills Scheme (FISS)/ Construction Skills Certification Scheme (CSCS). This research shows that although the vast majority of the sector is skilled to a high level, only 20% of employees possess current FISS/CSCS certification.

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1 Introduction

The following report provides an up-to-date overview of the UK fencing industry. The fencing industry is one of a range of industries within the Land-based and Environmental sector footprint, as defined under the Lantra remit. The evidence provided within this report is based primarily upon a comprehensive Fencing Labour Market Information (LMI) survey, which was conducted towards the end of 2009.

1.1 Research context

At present, the LMI currently available for the fencing industry is in need of updating. The latest figures produced by Lantra are from the Lantra Business Survey performed in 2005[1].

The research project reported in these pages will act to support Lantra's developmental activities, which aims to fill gaps in existing industry knowledge through primary research. The research will also fulfil part of Lantra's commitment to undertaking reviews of each of its industries on a triennial basis.

For the purposes of this research, the fencing industry is recognised as covering a number of sub-industries including agricultural fencing, high security and electrical fencing, vehicle restraint systems and residential fencing. The industry also includes automatic gates and access barriers.

The fencing industry is not covered in national statistics by a single coherent SIC (Standard Industrial Classification)[2] or in SOC (Standard Occupational Classification) codes. Due to the variability in activity within and between fencing businesses, the industry appears amongst both agricultural and construction SIC and SOC codes; this makes the specific data impossible to distinguish from other industries and sectors. Therefore top-down research, namely that which relies on national statistics, is not feasible. Due to this shortcoming in national data sources, a bottom-up research approach was adopted for this research project.

1 Lantra Business Survey (2005) – covered UK Land-based and Environmental sector businesses

2 ONS – Standard Industrial Classification codes (SIC) 2003

1.2 Research aims and objectives

The main aim of the project is to identify the current skill needs and challenges within the fencing industry across the UK. In doing so the following objectives will need to be completed:

- To identify the employment numbers of those businesses operating within the fencing industry
- To identify the size of businesses by staff numbers (e.g. 0-4, 5-9, 10-24, 25-99 and 99+ employment)
- To identify key workforce characteristics of those employed within the industry (characteristics to include workforce gender, age, ethnicity, employment status)
- To quantify the number of employees within specific occupational profiles (there are nine broad occupational categories or SOC groups, although not all are likely to be relevant to the fencing industry)
- To identify the extent of employment vacancies within and across the industry (specific interest to be targeted towards assessing the extent of skill shortages and hard to fill vacancies)
- To identify the extent of skill gaps within the current workforce (i.e. the number of staff who lack proficiency in their role)
- To identify the level of training activity within and across the industry (to include both actual training provision/funding, as well as employer opinions with regard to training and future training needs)
- To assess how employment numbers will change and have changed (expansion and replacement demand)
- To measure the economic value of the industry (measures to include Gross Value Added and turnover)
- To identify the key issues and drivers for change within the industry.

1.3 Structure of the report

In the subsequent section, the report includes an explanation of the research methodology that supports this project. Following this, the report will set out and discuss the main findings from the analysis of the fencing LMI survey. Specifically, the analysis will include information on the profile of the industry; workforce characteristics; recruitment and skills challenges; and training activity and development. These chapters are in line to achieve the objectives as set above. The survey findings are to be supplemented where necessary and in order to provide further context and understanding by data identified in Lantra's latest Skills Assessment 2009[3]. Following the data analysis and discussion, the report progresses towards formulating overall conclusions from the findings and presents Lantra's recommendations based on the research results.

3 A Skills Assessment for the Land-based and Environmental Sector UK report – Lantra, October 2009

2 Methodology

The research programme comprised a two stage mixed methods approach. The first stage involved a quantitative telephone survey of 450 UK employers within the industry. The second stage involved a qualitative workshop discussion with key fencing representatives, including both trade association members and employers.

2.1 Research methods and process

Lantra developed a questionnaire (see Appendix A) and distributed this via a telephone survey. The content of the questionnaire was aimed at covering the project objectives, as listed above (Section 1.2). The questionnaire was compiled with input and feedback sought from representatives of the fencing industry. This industry expertise was beneficial in helping to keep the questionnaire content and language both accessible and salient to the prospective respondents. Figure 2.1 sets out the main sections of the questionnaire.

Figure 2.1 Questionnaire sections

Section	Topic area covered
A	Business information
B	Workforce characteristics
C	Recruitment
D	Skills issues amongst current workforce
E	Training activity and development
F	Industry performance

A full version of the questionnaire can be found in Appendix A.

An external contractor, Pye Tait Consulting, was recruited to conduct the data collection phase of this survey via telephone conversations with a specified sample of fencing employers. Prior to conducting the survey in full, Pye Tait subjected the questionnaire to a rigorous piloting process, completing questionnaires with 20 fencing businesses. The pilot helped to identify and improve the questionnaire content so as to be as user-friendly as possible.

Contact details for fencing businesses were obtained from the Experian national business database[4]; this database incorporates business data from the Yellow Pages and Thomson directory. Lantra purchased 2,750 business contacts from the B2B Prospector source. Businesses were selected from the Experian category of 'Fencing Services'; this category was distinguished from 'Fencing Manufacturers' and 'Fencing Materials' as both were deemed to include businesses outside of the Lantra remit.

4 Experian National Business Database – B2B Prospector

Several measures were utilised in order to maximise caller response rates for the telephone survey. Prior to commencing the full survey, introductory letters were sent out to each of the fencing businesses that Lantra had purchased contact information for. Introductory letters are a useful tool used to inform and prepare potential respondents for the survey. They help to ease the situation when a call is made or received, provide information on the aims and objectives of the research, and also act to authenticate the survey and the external consultant company conducting the survey.

The average length of the survey was 15 minutes, deemed an important time frame so as to firstly encourage participation but secondly to avoid early interview withdrawal or respondent fatigue. The consultants also operated a three-time call-back mechanism, whereby each business was contacted three times before contemplating being dropped from the contact list for non-response. This technique gave all businesses an equal opportunity to complete the survey.

The second stage of the research included a workshop discussion with members of the Lantra Industry Group. Topics covered included recent business performance, current industry challenges, recruitment issues and skills needs, as well as assessing the accessibility/availability of training.

2.2 Sample frame

Lantra sets itself stringent targets in terms of acceptable survey sample sizes for its research projects. These measures are taken in order to achieve results that are representative of the population/industry being researched and also produce statistically robust and credible findings. Specifically, Lantra aim to achieve a confidence interval of +/-5% (at a probability level of 95%) in their survey research.

Although Lantra set initial sample targets along the statistical confidence definitions and levels, each sample must be assessed on a case-by-case basis. Therefore, when sampling from small population sizes or minority industries it is important to treat sample targets with a certain amount of realism. For example, in looking at Table 2.1, in order to achieve the +/-5% confidence level for the Northern Ireland sample, 44 out of a total sample of 50 would need to be achieved to hit the recommended confidence level. This is a wholly unrealistic target under the financial guidelines and time frames.

Table 2.1 Sample frame required and achieved

Nation	Population (no. of establishments)*	Proportion (%)	Sample required to meet +/- 5% confidence interval	Sample achieved
UK Level	3,150	100	342	450
England	2,750	87	337	375
Scotland	250	8	152	39
Wales	100	3	80	26
Northern Ireland	50	2	44	11

*Population numbers for 'Fencing Services' businesses based on Experian business database, 2008.

The achieved sample size enables statistically robust analysis to be conducted at a UK level and specifically at an England level also. This data will be within the +/-5% confidence interval levels as stated above. Where data is stated within this report for Scotland, Wales and Northern Ireland, caution should be taken as these will only be indicative results.

3 Industry size and structure

Chapter summary

- The UK fencing industry is comprised of around 3,150 fencing businesses; the majority of which are located in England, with the highest proportion in the South East region.
- There are 27,000 workers employed in the industry.
- Around 85% of businesses are micro businesses, employing fewer than ten people.
- The majority of businesses operate in the residential fencing sub-industry; although two-thirds of businesses operate across at least two sub-industries.
- Three in ten businesses generated a turnover in excess of £250,000 in the last 12 months.
- Just under half of UK fencing businesses reported their turnover to have decreased in the last 12 months.

The fencing industry covers a wide range of business activities and structures. The following section looks to provide an overall profile of the industry, reporting specifically on the business numbers, type, activity and performance.

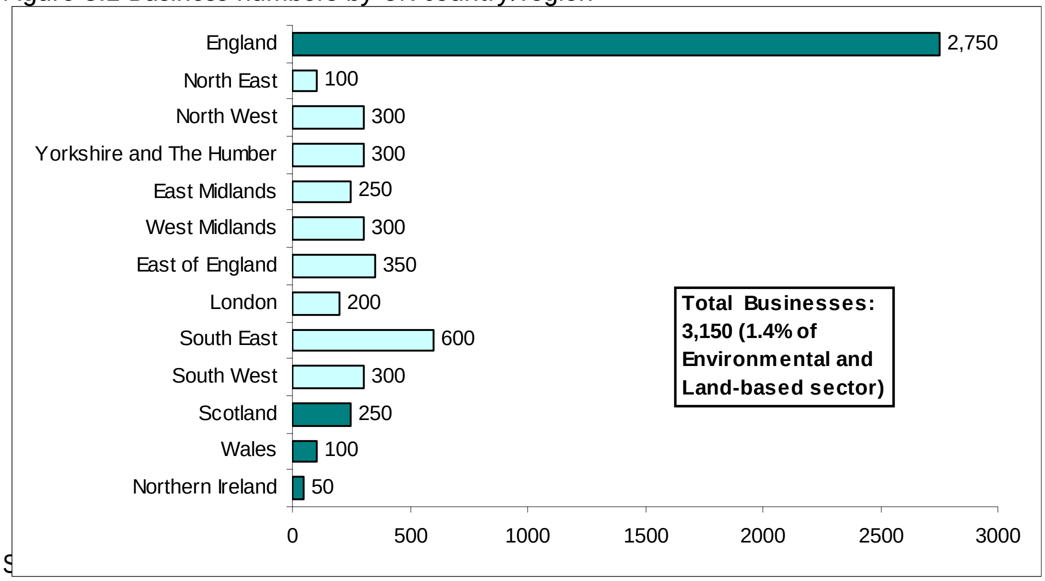
3.1 Industry profile

According to latest estimates published in the Lantra UK Skills Assessment 2009[5] report, there are currently around 3,150 UK fencing businesses. Industry representatives suggest this figure is a low estimate, due to 'hidden' businesses such as sole traders. This figure was derived using figures from the Experian National Business Database. Using this figure, fencing businesses represent 1.4% of the total businesses operating in the UK Land-based and Environmental sector.

5 Lantra – A Skills Assessment for the Land-based and Environmental Sector (October 2009)

Figure 3.1 provides a useful summary chart of the regional breakdowns of business numbers within the industry.

Figure 3.1 Business numbers by UK country/region

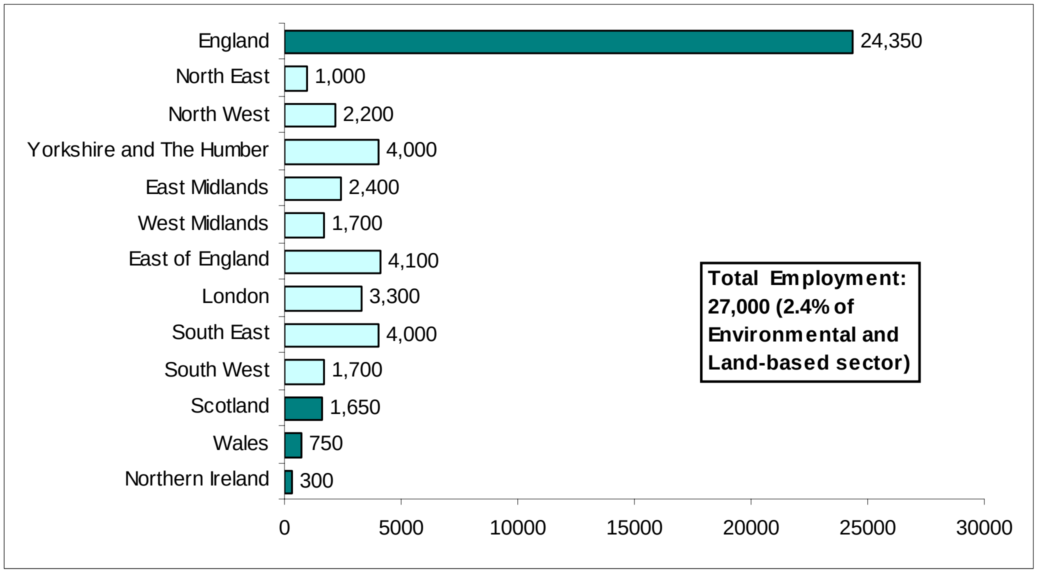


The data in Figure 3.2 provides a further breakdown of the UK fencing industry by regional location. Although it must be noted that many fencing businesses operate nationally so do not necessarily remain region specific.

The Lantra UK Skills Assessment states that there are currently 27,000 members of staff employed in the UK fencing industry. Industry representatives were happy that this figure is a fair representation of the number of employees in the fencing industry. This figure represents around 2.4% of the total employment in the UK Land-based and Environmental sector.

Industry representatives highlighted that in addition to this figure, there are also full-time workers who install fences as part of their role, but who are not full time fence installers.

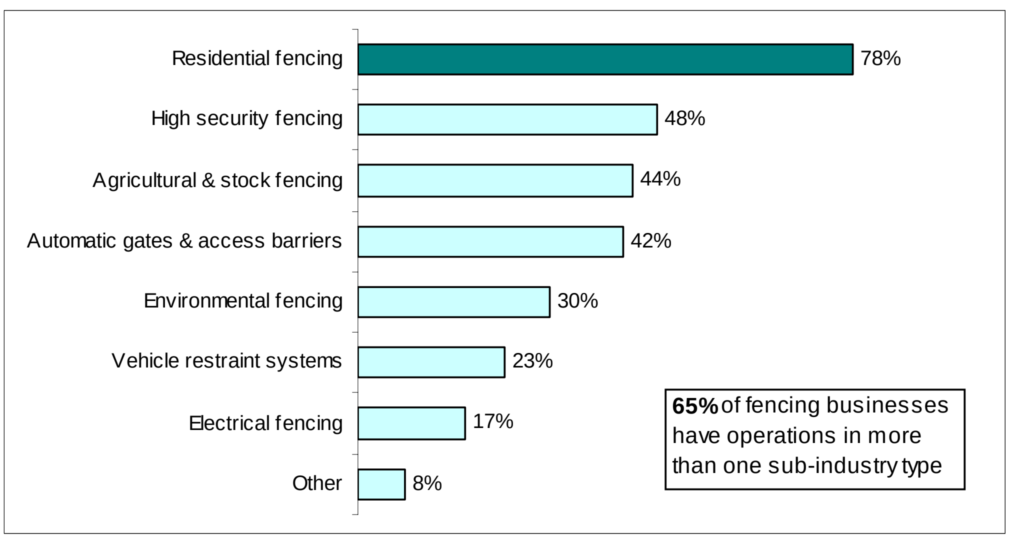
Figure 3.2 Employment numbers by country/region



Source: A Skills Assessment for the Land-based and Environmental sector – Lantra 2009

Figure 3.3 provides an indication of the diversity in sub-industry activity amongst UK fencing businesses, as recorded by the fencing LMI survey. The data pinpoints 'residential fencing' as the foremost business operation within the industry; just over three-quarters (78%) of businesses report operating within this sub-industry.

Figure 3.3 Breakdown of UK fencing industry by sub-industry operations

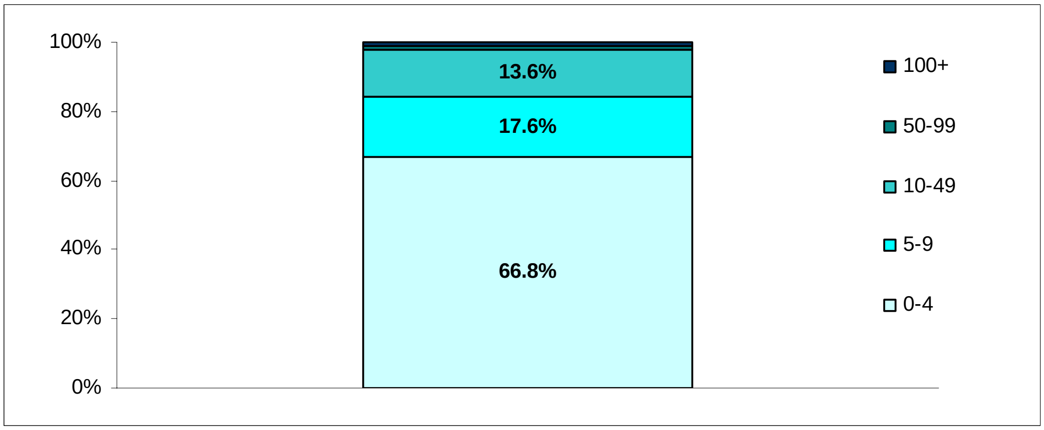


Sample base = 450; one did not state a response (DNS); Weight applied; multiple response format

Overall, the data suggests that the majority of UK fencing businesses operate across several sub-industries rather than specialising in only one particular activity. Only 35% of businesses reported having business operations in a single sub-industry; the remaining 65% reported operations in two or more sub-industries.

Figure 3.4 reveals that the composition of the UK fencing industry is dominated by micro businesses, specifically by businesses employing fewer than ten members of staff (84% are accounted for in this band). At the opposite end of the scale, around 2% of businesses employ 50 or more members of staff.

Figure 3.4 Business size by employment band

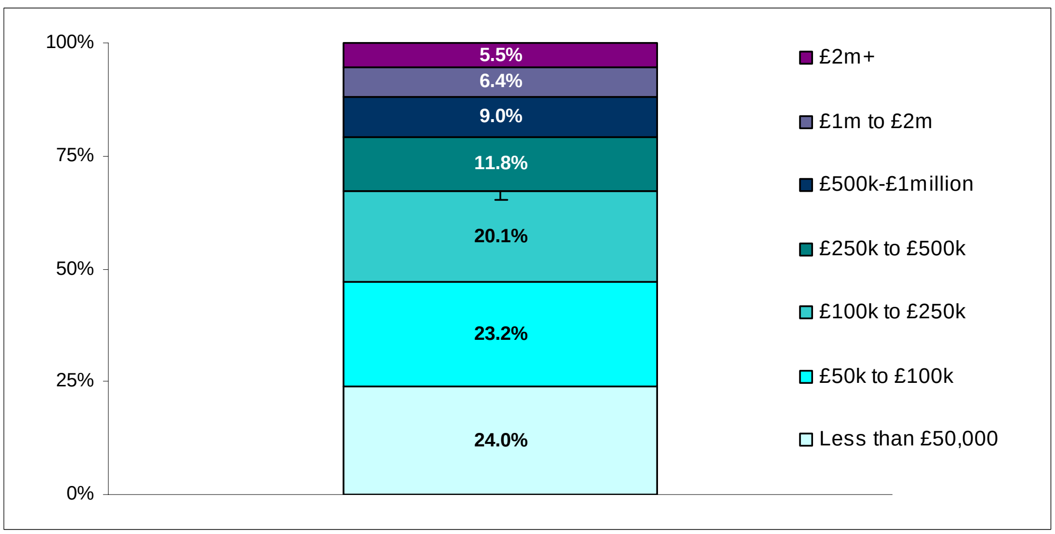


Sample base = 450; one did not state a response (DNS); UK weight applied

3.2 Industry performance and challenges

Figure 3.5 presents the breakdown of the UK fencing industry by turnover bands. The data reveals that around 67% of businesses produced turnovers of below £250,000 in the last 12 months. Nearly 12% of businesses produced turnovers of more than £1 million.

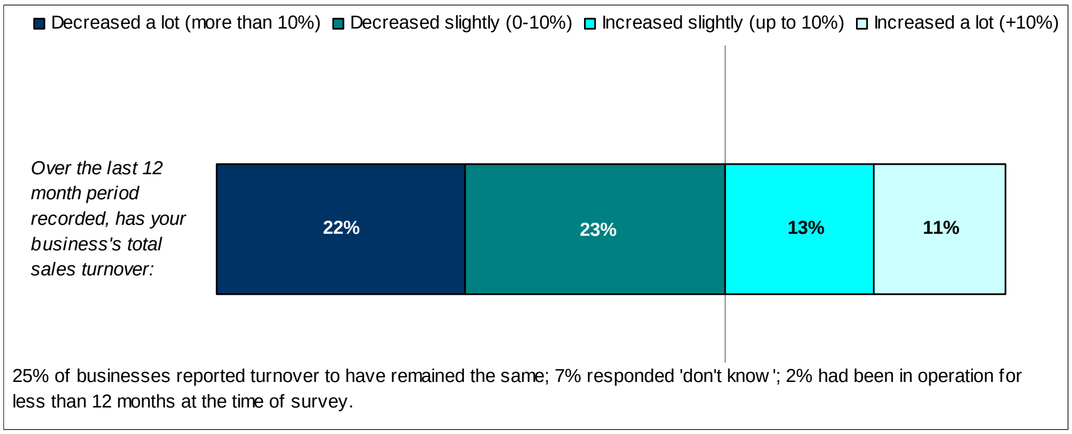
Figure 3.5 UK fencing industry breakdown by business turnover



Sample base = 450; UK weight applied

The data in Figure 3.6 assesses the level of business performance over the last 12 months in comparison to the 12 months previous. Around 45% of businesses reported turnover to have decreased, and of that, 22% reported turnover to have decreased by more than 10%. On a more positive note, over half of UK fencing businesses reported turnover to have either remained the same (25% reported this), increased by up to 10% (13%), or increased by more than 10% (12%).

Figure 3.6 The pattern of UK fencing industry of turnover over the last 12 months

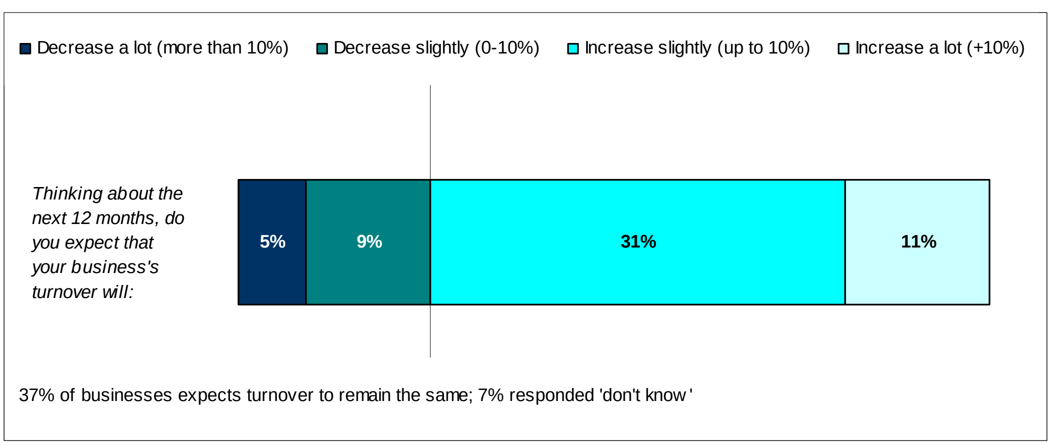


Sample base = 450; UK weight applied

UK fencing businesses were also asked to think about their turnover for the next 12 month period, in order to rate their expectation levels. In contrast to Figure 3.6, only 14% expect their turnover to decrease over the next year (Figure 3.7). The remaining 86% expect their turnover to either remain the same (37% reported this), increase by up to 10% (31%) or increase by more than 10% (11%).

The data from Figures 3.6 and 3.7 gives reason to suggest that the industry holds an optimistic view for the future ahead.

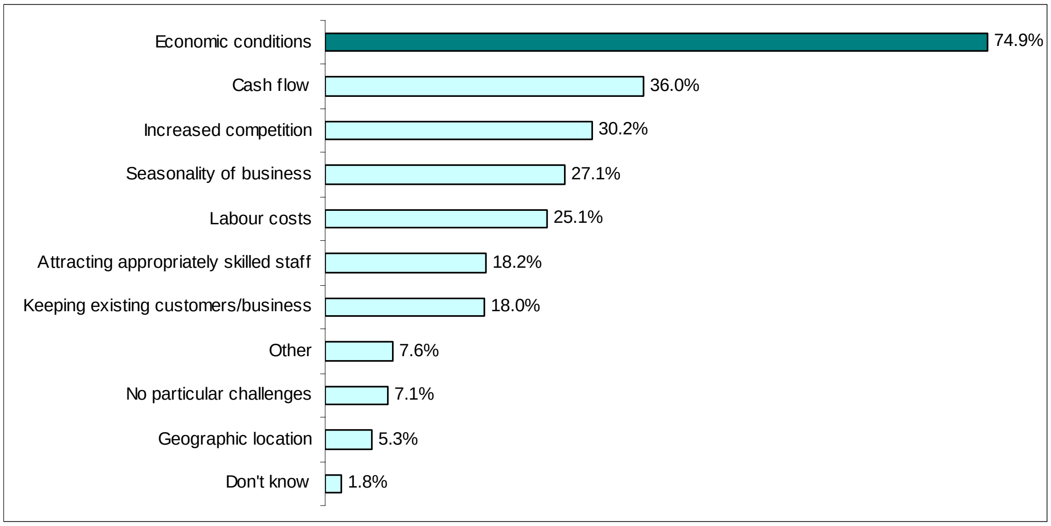
Figure 3.7 Expectations for business turnover in next 12 months



Sample base = 450; UK weight applied

Despite the optimism shown regarding expected turnover levels for the next 12 months, 75% of UK fencing businesses view the 'economic conditions' as posing a significant challenge over this period. Also, 36% of businesses reported another financial concern, that of 'cash flow', as the second most likely challenge to be faced over the course of the coming year.

Figure 3.8 Key challenges identified by UK fencing businesses



Sample base = 450 (multiple response question); UK weight applied

Evidence from discussions held with key fencing industry representatives pinpointed the level of competition as a concern for many of the industry's smaller businesses; this is due in part to the middle industry businesses undercutting their smaller counterparts to secure any available contracts. The industry has become unsustainable at the current prices being quoted.

On a national level, industry representatives also commented that the industry was certainly struggling due to the effects of the recession, particularly smaller businesses. It was commented that the larger fencing businesses appeared to have coped well during the economic downturn, as pots of money have been made available for specific localised highways projects and also in preparation for the London 2012 Olympics and Paralympics Games.

4 Workforce characteristics

Chapter summary

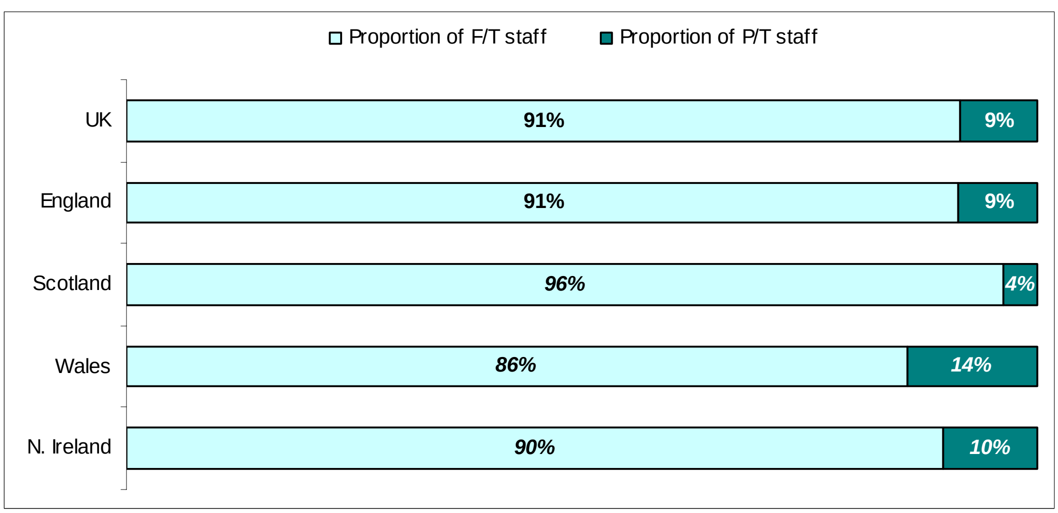
- The fencing industry employs a younger workforce than that of the Land-based and Environmental sector as a whole. Three in ten workers are over the age of 45, compared to nearer five in ten across the sector.
- The industry's workforce is predominantly in full time employment (92%), male (83%) and identify themselves as from a white ethnic group (97%).
- Employment is concentrated in *skilled trade* and *fence installer* occupations; the two account for 45% of all employment. Workers within manager (18%) and elementary occupation (16%) levels also figure highly.

This section provides an analysis of the UK fencing industry workforce. The following analysis looks specifically at the workforce structure in terms such as working status, gender, age, ethnicity, and also job levels.

4.1 Working status

Figure 4.1 indicates that just over nine in ten of UK fencing staff is employed on a full time basis. Conversely, the remaining proportion of just fewer than one in ten members of staff is employed on a part time basis. The employment status proportions do vary by nation, with fencing businesses in Scotland exhibiting the highest level of full time workers (96%), and Wales exhibiting the lowest (86%).

Figure 4.1 Working status of UK fencing staff



Sample base for UK = 450; England = 374; Scotland = 39; Wales = 21; N. Ireland = 11

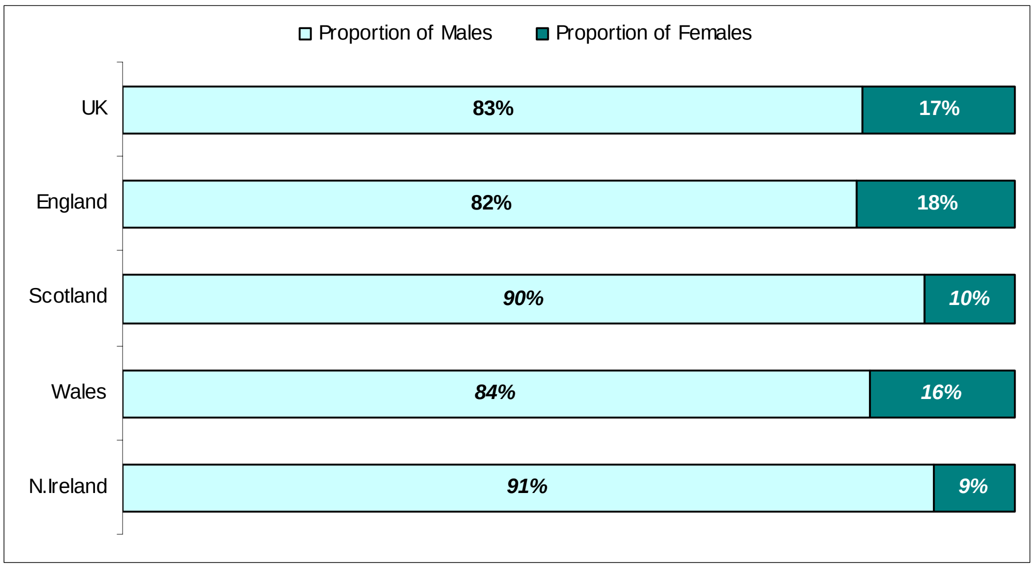
Data in italics (i.e. Northern Ireland, Scotland and Wales) should be treated with care as they are based on small samples below the +/-5% confidence interval and so are indicative.

When viewed in the context of the total Land-based and Environmental sector, fencing businesses employ a higher proportion of full-time staff. Data from the Labour Force Survey[6] indicates that 79% of employment within the sector is full-time. This compares to 75% within the UK economy as a whole.

4.2 Gender

The fencing industry is male dominated; at UK level, males account for 83% of total employment. As Figure 4.2 depicts, the data for the individual nations does vary with fencing businesses within Northern Ireland reporting the highest proportion of male employees (91%). The lowest proportion of male employees is reported in England (82%).

Figure 4.2 Gender composition of the UK fencing workforce



Sample base for UK = 450 (weighted); England = 374; Scotland = 39; Wales = 21; N. Ireland = 11
Data in italics (i.e. Northern Ireland, Scotland and Wales) is indicative and should be treated with care as it is based on small samples below the +/-5% confidence interval.

When viewed against the Land-based and Environmental sector overall, fencing businesses employ a higher proportion of male staff. Data from the Labour Force Survey indicates that 69% of employment within the Land-based and Environmental sector is male. This compares to 54% within the UK economy as a whole.

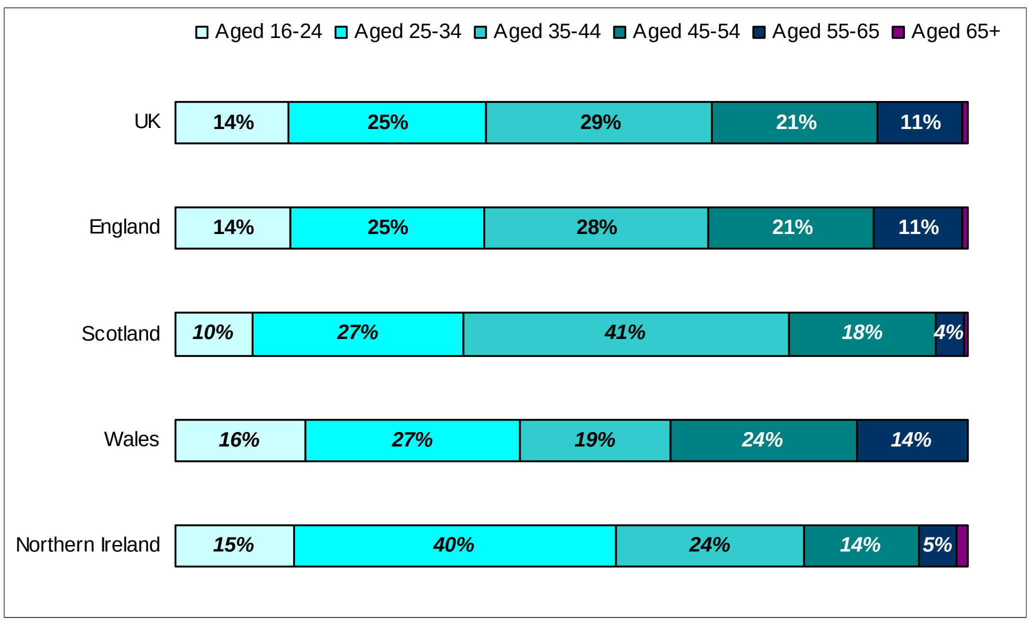
6 ONS – Labour Force Survey 2008

4.3 Age

At a UK level, the range of the workforce age is distributed relatively evenly across the age bands specified in Figure 4.3. Around 54% of the UK fencing workforce is aged between 25-44 years of age; the figure is similar for England (53%).

There are slight variations in the age band proportions across the other UK nations, although the overall trend in both Scotland and Wales remains similar to that of the UK. Fencing businesses in Scotland report 68% of workers between the ages of 25-44. The fencing industry in Northern Ireland appears to employ a younger workforce where 55% of employees reported on are below 35 years of age.

Figure 4.3 Age composition of the UK fencing workforce



Sample base for UK = 450 (weighted); England = 374; Scotland = 39; Wales = 21; N. Ireland = 11
Figures may not add up to 100% due to rounding of percentages during analysis.
Data in italics (i.e. Northern Ireland, Scotland and Wales) is indicative and should be treated with care as it has been calculated using small samples below the +/-5% confidence interval.

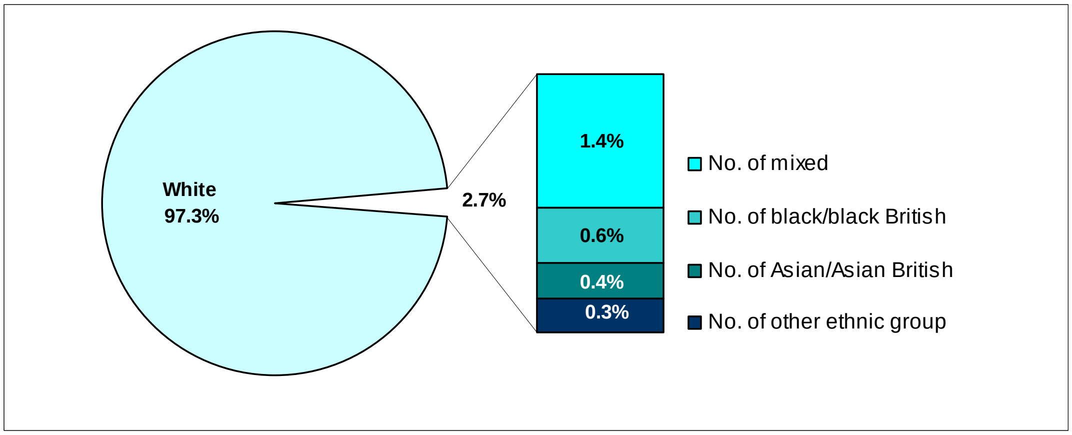
Overall, data suggests that the UK fencing industry employs a younger workforce than that across the wider Land-based and Environmental sector. Around 48% of staff within the Land-based and Environmental sector are aged 45 or above[7]. The age composition across the entire UK economy is very similar to that of the fencing industry, with 69% of employees between the ages of 25-54[8].

7 ONS – Labour Force Survey 2008
8 ONS – Labour Force Survey 2008

4.4 Ethnicity

The majority of the workforce within the UK fencing industry is of white ethnicity at 97.3%. The remaining 2.7% of workers are comprised of mixed ethnicity (1.4%), black/black British (0.6%), Asian/Asian British ethnicity (0.4%), and other ethnic groups (0.3%).

Figure 4.4 Ethnicity composition of the UK fencing workforce



Sample base = 450; weight applied

The pattern of ethnicity in the fencing industry is mirrored across the Land-based and Environmental sector overall, where 99% of the workforce is of white ethnicity. Across the whole workforce within the UK, 91% of the workforce is of white ethnicity[9].

4.5 Occupation levels

Figure 4.5 aims to classify the UK fencing industry workforce in terms of job level. The job levels are defined in line with the Standard Occupational Classifications (2000)[10]. The data suggests that employment within the UK Fencing industry is concentrated across three main levels:

- 18% of staff are employed within manager level occupations; these occupations account for 11% of staff across the Land-based and Environmental sector (15% across the UK economy)[11]
- 24% of staff are employed within skilled trade occupations; these occupations account for 33% of staff across the Land-based and Environmental sector overall (11% across the UK economy)
- 37% of staff are employed within elementary occupations; fence installers, currently recognised in SOC 2000 as an elementary occupation, account for 21% overall. Staff in elementary roles across the environment and land-based sector account for 26% of total employment (11% across the UK economy).

9 ONS – Labour Force Survey 2008

10 ONS – Standard Occupational Classification codes (2000)

11 ONS – Labour Force Survey 2008

Figure 4.5 Job level composition of the UK fencing workforce

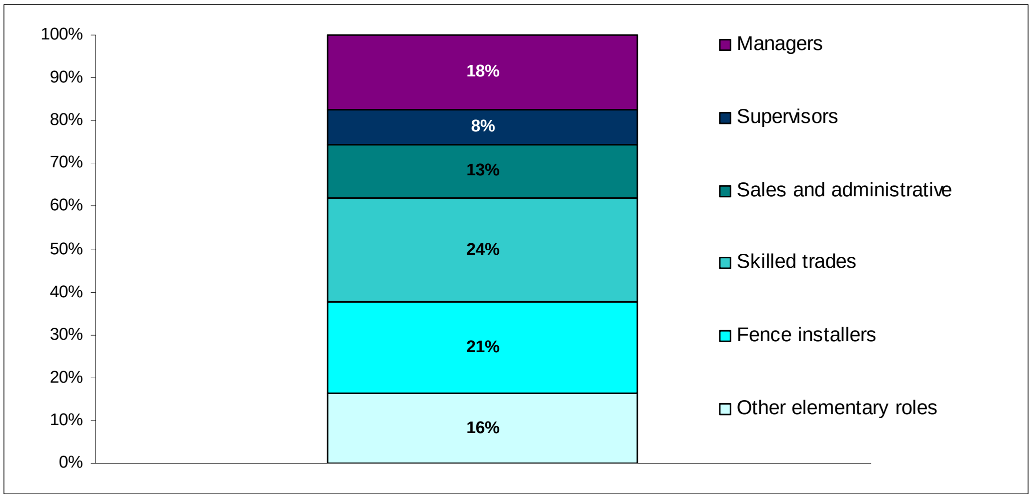


Figure notes: Sample base 450. Weighting applied.

The data in Figure 4.5 indicates that in comparison with the Land-based and Environmental sector overall, the fencing industry employs a higher proportion of staff in elementary occupations. This finding ultimately depends upon the placement of fence installers, arguably a skilled trade occupation, within SOC codes as an elementary occupation.

The distribution of job skills is typically in line with occupational levels; with those occupations at the top of the hierarchy requiring more skills than those at the bottom (e.g. managers require more skills than staff in elementary roles)[12]. Taking this viewpoint into account, the job level data suggests that the demand for staff with low qualifications levels (level 1 and below; as would be required for elementary roles) is greater within the fencing industry than across the Land-based and Environmental sector.

At the opposite end of the scale, given the higher proportion of manager-level occupations within the fencing industry compared with the Land-based and Environmental sector overall, the demand within the industry for high qualification levels (Level 4) will be proportionally greater than across the sector overall.

[12] Skill, Knowledge and Organisational Performance (SKOPE) 2007 - Skills at work 1986-2006

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5 Recruitment and skills challenges

Chapter summary

- Workforce numbers have declined in the past 12 months; a decrease of around five percentage points on current numbers.
- Businesses reported that employment vacancies are low; only 2% of businesses report having a vacancy. Around half of the vacancies that do exist are reported to be hard to fill; this is largely due to a lack of interest from prospective applicants.
- Around six in ten employers reported that when looking for new recruits they found problems identifying people with the right skills.
- Skill gaps are low within the UK fencing workforce; 97% of businesses reported that their current staff had the skills required to perform in their role.
- Of the few businesses that did report skill gaps, skills found to be lacking most often in staff were *technical* and *job-specific* skills.
- One quarter of businesses reported a lack of employee experience as the main cause of underlying skill gaps.

The following section of the report develops an overview of UK fencing industry recruitment activities from the previous 12 months. Discussion also takes in the skills challenges currently faced by industry employers. The topics covered include staff turnover, existing vacancies, skills gaps and skills shortages.

5.1 Recruitment

Figure 5.1 reveals that the number of workers leaving the UK fencing businesses has not been fully replenished by the number of new recruits taken on. This has led to an overall decline in the workforce in the past year. The data indicates that over the last 12 month period the UK fencing workforce has declined by around five percentage points on current levels.

The trend at England, Scotland, and Northern Ireland level is similar to that at the UK level within the fencing industry; all exhibit a decrease in employment numbers of around five percentage points. The data for Wales, in contrast, reports an increase in employment numbers of around one percentage point, although the data is not robust at the +/-5% confidence interval.

Figure 5.1 Employment change within UK fencing industry workforce (last 12 months)

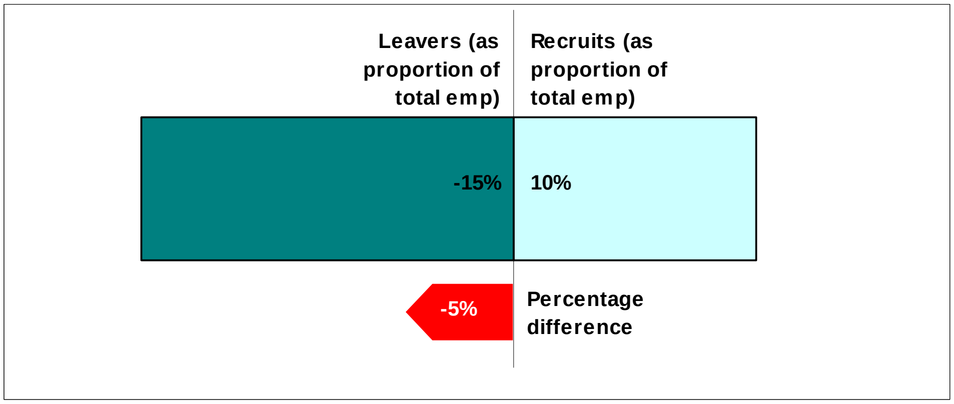


Figure notes: Sample base = 450; data at nation level is not robust so is not reported

Over the next 12 months, the majority of employers within UK fencing expect the number of staff to remain at their current levels; this was reported by 61% of businesses. Although almost one-quarter of businesses reported more optimistic outlooks for their workforce numbers; 24% report to expect to see an increase in staff levels over this period.

Figure 5.2 UK fencing workforce employment expectation levels over next 12 months

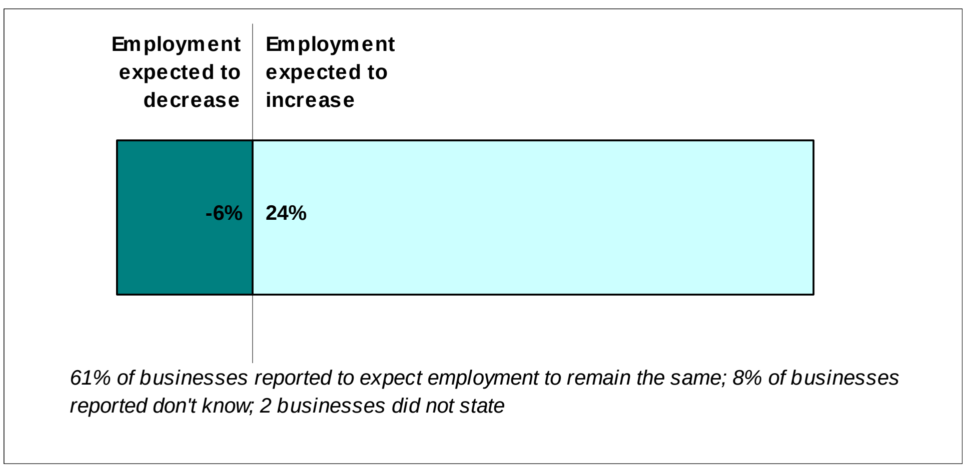


Figure notes: Sample base = 450
Figures may not add up to 100% due to rounding of percentages during analysis.

5.2 Employment vacancies

The data in Table 5.1 indicates that very few employers currently have employment vacancies; only 2% of businesses reported having an employment vacancy. Across the Land-based and Environmental sector around 9% of businesses reported having a vacancy; this compares with 18% across the UK economy as a whole.

The data from the National Employer Skills Survey[13], which covers England only, is included in Table 5.1 to provide a context from which the fencing industry results can be set. There is no single UK level source for this data.

The low proportion of businesses reporting vacancies is a concern in light of the indications from Figure 5.1 that the workforce is contracting. The underlying reasons can only be speculated, but the implications are that the optimism shown in Figure 5.2 appears unsupported by low vacancy rates.

Table 5.1 Employment vacancies in UK fencing industry

	Fencing industry	Land-based and Environmental sector[1]	All sectors in economy[1]
% of businesses reporting a vacancy	2	9	18
Vacancies as a % of employment	<0.5	3	3
% of businesses reporting HtFV*	1	4	7
HtFV as % of total vacancies	54	47	30

*HtFV = Hard to fill Vacancies

1. Data taken from the National Employer Skills Survey (NESS 2007); data for England only

Only 2% of fencing businesses report having a vacancy this is very low when compared with the sector and economy overall. Of these vacancies in the fencing industry, 54% are rated by UK fencing employers as hard to fill. This is a high incidence of hard to fill vacancies, which is reflected across the Land-based and Environmental sector in which 47% of vacancies are hard to fill whereas just 30% of vacancies across the whole economy are hard to fill.

However, although this figure for the fencing industry is high, this accounts for just 1% of fencing businesses reporting a hard to fill vacancy.

13 Learning and Skills Council (LSC) – National Employer Skills Survey (NESS) 2007

Figure 5.3 below indicates the reasons given to explain businesses having vacancies that are proving hard to fill, although these are not robust given the low sample size responding to the question. A lack of interest from prospective applicants was reported by three businesses as the reason given to explain hard to fill vacancies.

Figure 5.3 Reasons given for businesses having hard to fill vacancies

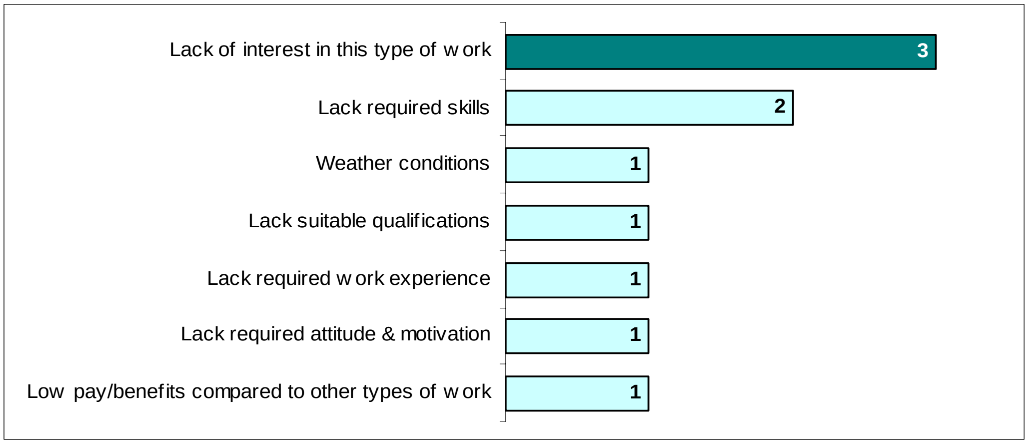


Figure notes: Sample base = six; filter applied to include only businesses reporting having HtFVs. This was a multiple response question format.

In summary, the workforce is declining in size, employment vacancies are low, and of those vacancies that do exist, over half are hard to fill due largely to a lack of interest in this type of work. However, it would be wise to remember that this has all occurred against the backdrop of one of the worst economic recessions on record. Circumstances have otherwise dictated recruitment patterns.

5.3 Skills challenges

Figure 5.4 presents employer opinions in response to three skill and workforce retention related statements.

The first statement continues the link from the previous section covering recruitment; 58% of employers reported to agree or strongly agree that ‘when looking to take on new recruits’ they had found problems identifying people with the appropriate skills needed to perform in the role (22% strongly agreed). Only 7.2% of businesses disagreed strongly with this statement.

The findings suggest that recruiters within the UK fencing industry appear to face problems in identifying people with the right skills needed to perform in fencing job roles. Two key staff recruitment issues are inherent here, either that there is greater responsibility on the business itself to train new recruits from scratch in order to overcome the skill deficiencies that exist; or the business does not take on additional staff as no-one is deemed suitable.

The second statement in Figure 5.4 looks to assess the adequacy of the education system to equip staff with the skills required to start work in the fencing industry. Over half of employers, around 58%, agreed that the education system does not supply enough people with the skills they need to start working with employers. Just over 20% of employers agreed strongly with the statement.

The implication here is that in more cases than not, fencing businesses find it necessary to bridge the skill gap in staff when recruited directly from education. The duty to up skill staff members is placed firmly on the shoulders of the business. When skill deficiencies are identified as technical and job specific, this training is to be expected and therefore manageable. However, when skill deficiencies relate to basic numeracy and literacy for example, this is a duty duly accountable to the state, not the business.

Figure 5.4 Employer opinions on staff skills and retention in UK fencing industry

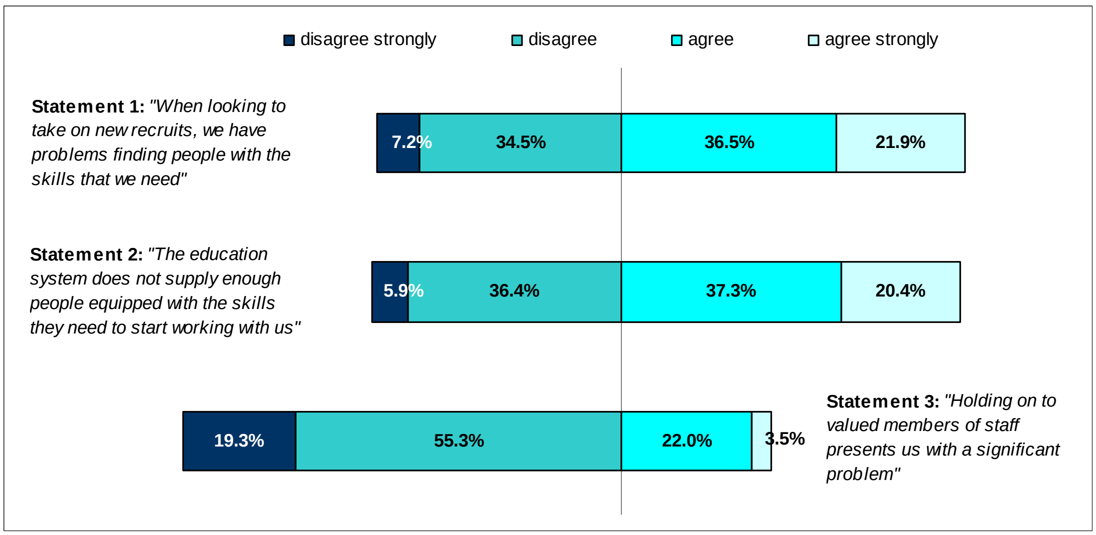


Figure notes: Sample base = 450; weight applied. Figures may not add up to 100% due to rounding of percentages during analysis.

The third statement posed to UK fencing businesses concerned the ability of employers to hold on to valued members of staff. Around three quarters of employers either disagreed or disagreed strongly with the significance of staff retention as being a problem; just fewer than 20% of employers disagreed strongly with the statement.

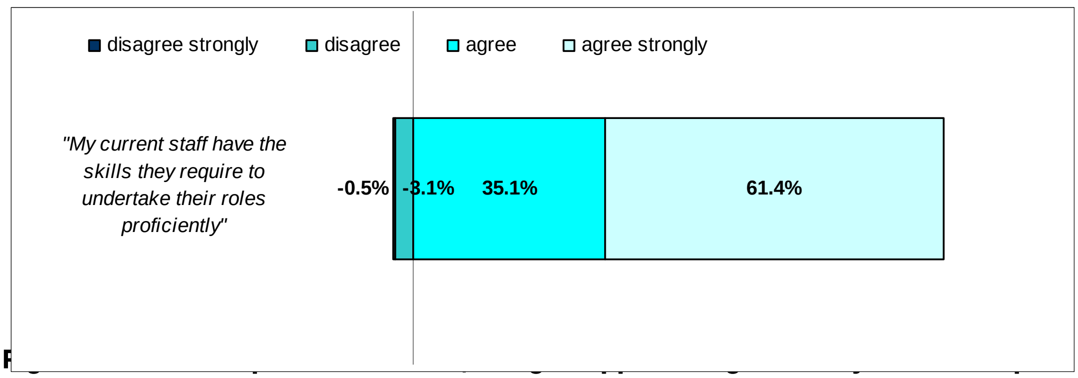
The findings from responses to the third statement suggest that staff retention is not a particular problem across the UK fencing industry. In light of the decline in workforce numbers, the implication here is that few staff were released that were not, to an extent, expendable. Businesses were probed further in order to explore the types of skills found difficult to obtain from applicants. The response recorded most often from businesses was 'technical, practical and job related skills', 43% reported this skill as one difficult to obtain from applicants. The next most cited response at 8%, although not a skill in itself, was an appropriate work ethic including commitment, enthusiasm, motivation, attitude, dedication, reliability and punctuality.

5.4 Skills gaps

Having addressed the skills challenges facing employers looking to recruit new staff members, the following analysis investigates the skills gaps and challenges amongst the current staff members.

UK fencing employers were asked to report their level of agreement as to whether their current staff members had the skills they required to undertake their roles proficiently. Almost 97% of employers agreed or strongly agreed that their current staff did have the skills necessary to perform their roles proficiently. Over 61% agreed strongly with the statement.

Figure 5.5 Level of current staff proficiency



F… 100% due to rounding of percentages during analysis.

The incidence of skill gaps reported in the UK fencing industry is low, especially when viewed against the figures for the Land-based and Environmental sector overall. No single UK data source is available for skill gap levels. According to data for the sector in England, 11% of business establishments reported having a skill gap amongst staff members[14]. The low level of skill gaps in fencing is likely attributable to the extent to which fence installers and elementary occupations dominate the workforce.

Of those employers reported to disagree with the statement in Figure 5.5, those who felt current staff did not possess the required skills to be fully proficient, around 70% of responses reported ‘technical, practical or job related skills’ to have been the skill types that were lacking amongst their staff members.

The main cause attributed by employers for skill gaps amongst their workforce is a lack of experience. A failure to train staff and a lack of motivation were also commonly cited. The suggestion here is that time spent in work rather than time spent in training will likely resolve a large proportion of current skill gaps.

14 LSC – National Employer Skills Survey (NESS) 2007

The impacts of skill gaps on businesses can vary greatly. Among the fencing industry, the most frequently cited impact of having a skill gap is to increase the workload for other staff members. Difficulties were also faced in developing new working practices and in meeting quality standards. A stretched workforce is not sustainable and often leads to a decline in either quantity of work taken on or quality of work completed.

In regards to the actions employers take to overcome or nullify the effects of staff members lacking job role proficiency, the most common response reported by employers is to provide more supervision or increase other training activities and expenditure. These responses make for positive reading, and suggest a proactive attitude to dealing with skill gaps.

The fencing industry has a well established skills card recognition scheme Fencing Industry Skills Scheme (FISS)/Construction Skills Certification Scheme (CSCS). It is currently estimated that approximately only 20% of workers within the sector are certificated although many operatives will possess the appropriate skills.

Having presented the data on the skill challenges currently facing the UK fencing industry, the report will now switch to look at the training activity and development currently occurring in the industry.

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6 Training activity and development

Chapter summary

- Around 40% of the UK fencing workforce has received some form of training within the previous 12 months; each trainee has received around 4.5 days of training during this period.
- The most common mode of training arranged was off the job training courses (60% of businesses arranged these for staff members). Second to this was on the job supervision, reported to have been arranged by 54% of training businesses.
- The main barrier to training identified by fencing businesses was a lack of funds, 64% of businesses reported this.
- Only 6% of fencing businesses report offering an Apprenticeship scheme; of those that didn't offer the scheme, a 'lack of knowledge' was commonly reported as the main reason for this.
- Looking ahead, the most frequently reported future skills needed is vehicle/machinery/tool use (e.g. forklift truck driving, chainsaw operation).

The following section reports on the extent to which training is a feature within the UK fencing industry. The section investigates a number of key factors around training activity and involvement including training provision, budget planning and funding, the offering of Apprenticeships, whether any barriers to training exist and also establishing future training needs.

6.1 Training activity

Looking at the organisation of training within fencing businesses, the data reveals that fewer than one in five businesses operate a training plan which specifies in advance the level of training that a business' employees will need in the coming year. Fewer than one in ten businesses incorporate a set budget for training expenditure. The implication here is that training is arranged on an ad hoc basis as and when a particular need arises.

The formal organisation around training provision and funding among fencing businesses is low when viewed against data for the Land-based and Environmental sector, and indeed against the UK economy as a whole. Data in Table 6.1 confirms that across the sector, 28% of businesses have a training plan (48% across the economy as a whole) and 20% have a training budget (35% across the economy as a whole). The sector and economy comparisons are based on data for England, as no single data source exists for the UK.

Over the previous 12 months almost half (46%) of businesses have arranged training of some type for their staff members. Reading across the data in Table 6.1, this proportion is similar to that of the Land-based and Environmental sector overall, where 52% of businesses arranged training in the last 12 months. Across all sectors in the economy, the proportion is higher at 67%.

Training has been arranged for 40% of staff within the UK fencing industry over the previous 12 months. Data in Table 6.1 reveals that within the sector overall, 48% of the workforce received training in the last 12 months. However, the sector compares poorly to total businesses in the economy as a whole where 63% of the workforce received training.

On average, each staff member has received just over 4.5 days of training in the last 12 months. According to the data in Table 6.1, trainees within the sector received around five days of training in the 12 months recorded; across the economy as a whole trainees received almost ten days of training.

Table 6.1 Level of training activity among UK fencing businesses

	UK fencing industry	**Land-based and Environmental sector[1]**	**All sector economy[1]**
% of businesses that have a training plan	18	28	48
% of businesses that have a training budget	9	20	35
% of businesses that have arranged training for staff in previous 12 months	46	52	67
% of staff that have received training in previous 12 months	40	48	63
Number of days' training received per staff member (arithmetic average)	4.5*	5.4	9.8
% of businesses that formally assess impact of training**	46	28	46

Data source: [1] National Employer Skills Survey, 2007 – data for England only

* Figure must be used with care, gives average number of days provided where days stated ranged from 0-20. **Filtered out businesses that have not arranged training in previous 12 months.

The arithmetic average number of training days per staff member was calculated to be 4.5 however this figure must be used with care. This gives the average where businesses stated 20 days' training or less. The actual range of days of training per staff member stated by businesses was from one to 314. However, such a wide range indicates that the question may have been misunderstood by some respondents and they may have given a figure detailing the total number of training days received by all staff.

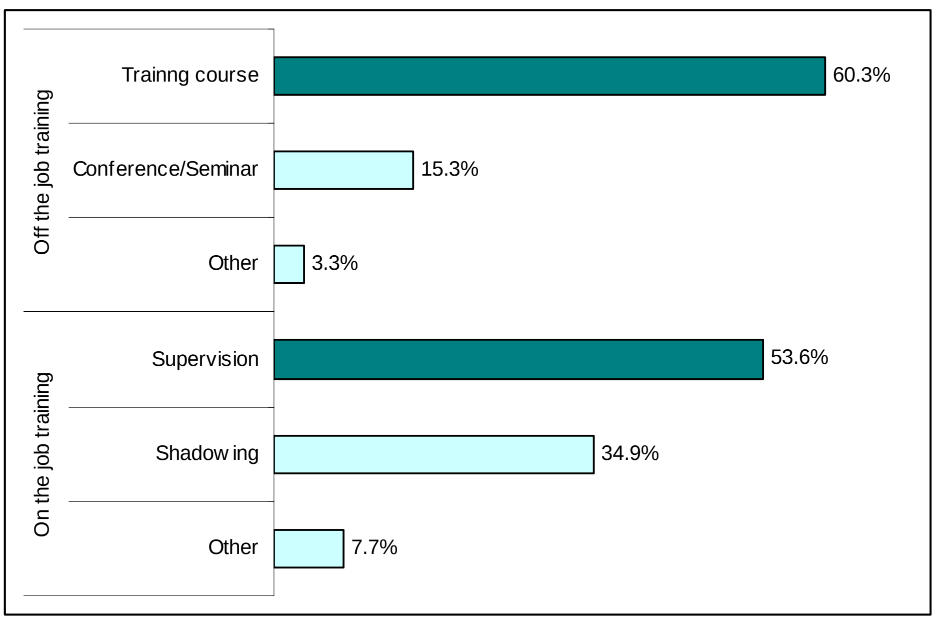
Therefore after discussions with industry representatives, it was decided to use 20 days as a cut off point. The most frequent number of days of training received by each individual staff member was two and 75.6% of businesses stated that the number of training days per staff member was between one and five.

Of those businesses that had arranged training for staff members over the previous 12 months, 46% of fencing businesses formally assessed whether the training and development received by an employee had an impact on their performance. However, only 28% of businesses within the Land-based and Environmental sector formally assess the impact of training attended by members of staff.

Of those UK fencing businesses that had not arranged training for staff members over the previous 12 months, the main reason given to explain the lack of provision was that all members of staff were already fully proficient; around 71% of such businesses reported this.

Figure 6.1 presents the type of training arranged for UK fencing staff over the last 12 months. Of those fencing businesses that had arranged some form of training, the two most prominent forms of training arranged were an off the job training course (60% arranged this type) or on the job supervision (54%).

Figure 6.1 Type of training arranged/received



Sample base = 209 (filtered out businesses that have not provided training in previous year); multiple response question format

The extent of training arrangement is likely to be determined by the availability of funding, whether self-generated or received from an external source. According to the data in Table 6.2, around eight in ten fencing businesses cover the full cost of training themselves.

Table 6.2 Funding provision for training in UK fencing industry

Funding for training	**%**
Business funded full cost of training	82
Government funded scheme (e.g. train to gain)	10
Both	8

Table notes: Sample base = 209 (filtered out businesses that have not provided training in previous year)

It is not for this report to speculate why the take-up of Government funded schemes appears low among businesses within the UK fencing industry. However, this factor is something to highlight again should funding be reported as a barrier to accessing further training.

6.2 Apprenticeships

Apprenticeships are becoming increasingly flexible and are open to all and therefore would be a viable option for all employers. Industry has indicated that legislation that prevents 18 year olds and under working on many construction sites and the need to be 21 to operate some heavy plant and equipment means that opportunities for young apprentices to make worthwhile contributions for their employer are limited. Employers have emphasised the need for funding support for young and older apprentices. As around 14% of the UK fencing workforce are between the ages of 16 to 24 years, Apprenticeships should be a training route for employers to consider.

However, the results in Table 6.3 reveal a low proportion of Apprenticeships being offered within the UK fencing industry. As it stands, fewer than 6% of businesses offer an Apprenticeship (or Modern Apprenticeship). However, according to anecdotal evidence from those involved with the industry and Apprenticeship data, this figure is high. Therefore it may be that businesses have included younger members of staff who they have taken on and trained but who are from outside the formal Apprenticeship framework.

Additionally, businesses may have included apprentices who are not fencing apprentices but who are part of the Apprenticeship framework in another department, such as Business Administration and Customer Care. Figures obtained from the Learning and Skills Council (LSC) Data Service for 2007/2008 indicate that less than five apprentices undertook a fencing Apprenticeship at this time in England. This indicates that the figure of 6% for the UK may be not be accurate, with industry representatives suggesting a true figure for Apprenticeships and Modern Apprenticeships to be closer to 1%.

Promisingly, almost 31% of businesses would consider offering an Apprenticeship in the future.

Table 6.3 Proportion of UK fencing businesses offering (Modern) Apprenticeships

Does the business offer Apprenticeships (or Modern Apprenticeships)?	**UK %**
Yes	5.6
No	63.1
No, but possibly in the future	30.6
Don’t know	0.7

Table notes: Sample base = 450 (data weighted)

Increasing the uptake of Apprenticeships for those businesses thinking of offering this route in the future, therefore, depends largely upon the reasons underlying the decisions not to offer Apprenticeships. The implication is that if such problems can be resolved, then Apprenticeship take-up is likely to increase.

Overall the most common reason, with 30% citing this, for not offering an Apprenticeship option is that all members of staff are currently already fully trained. In such businesses there is clearly no obvious need for an Apprenticeship scheme, unless the business were to experience expansion or a current employee were to leave. If Apprenticeship uptake is to be increased currently, then attention should be directed towards the 20% of businesses that did not offer Apprenticeships because they did not know enough about the schemes.

Figure 6.2 Common reasons for businesses not offering (Modern) Apprenticeships

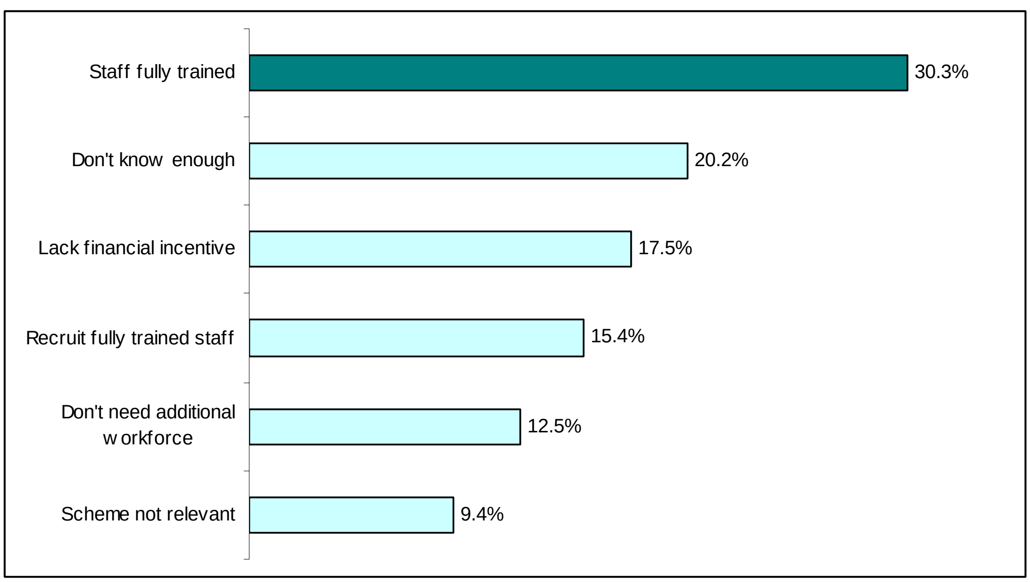


Figure notes: Sample base = 416 (filtered out businesses that already offer Apprenticeships)

Evidence arising from discussions with key industry representatives commented that Apprenticeships would be more successful if the age range were removed or expanded beyond the current 25 year old cut off. Age is a key factor in taking staff members on; due to the nature of the work and health and safety requirements, the business/employee insurance cover becomes an important motivator in recruitment considerations.

There are two main stumbling blocks preventing fencing businesses from taking on school leavers; due to their age, not only do school leavers incur particularly high insurance rates for the business, but they are also prevented from operating specific machinery or to work at particular locations (e.g. UK highways) due to official health and safety regulations. Such factors restrict Apprenticeship schemes further along lines of both the age of the apprentice and the activity of the business.

6.3 Barriers to training

Businesses were asked whether they wish they had provided more training for their staff over the previous 12. Figure 6.3 presents the data separated by whether the business had provided training over the last 12 months. The data suggests that businesses that provided training over the previous 12 months were more likely to have wanted to increase the amount that they had arranged.

Around 57% of businesses that had provided training in the previous 12 months would have liked to have provided more; this compares with only 38% of those businesses that had not provided any training at all.

Figure 6.3 Businesses that would have liked to have provided more training in last 12 months

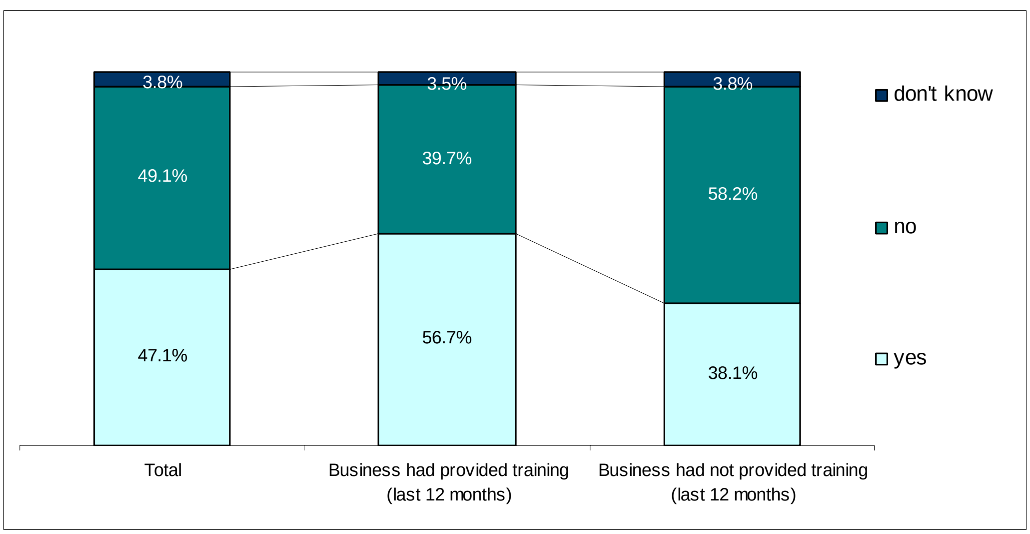


Figure notes: Sample base = 450 (weighted). Figures may not add up to 100% due to rounding of percentages.

According to the data presented in Figure 6.4, 64% of businesses reported that a lack of funds or the training was too expensive were considered as the barrier preventing them from arranging more training. Time constraints (38%) and a lack of knowledge surrounding viable courses (19%) were the next most commonly reported training provision barriers.

The low take-up of Government funding schemes, as presented in Table 6.2, is made all the more pertinent here in light of a lack of funds being reported to impose a barrier on training aspirations within the industry. The reasons explaining this lack of take-up would need to be gathered before any conclusions can be drawn on this finding.

Figure 6.4 Barriers to training provision

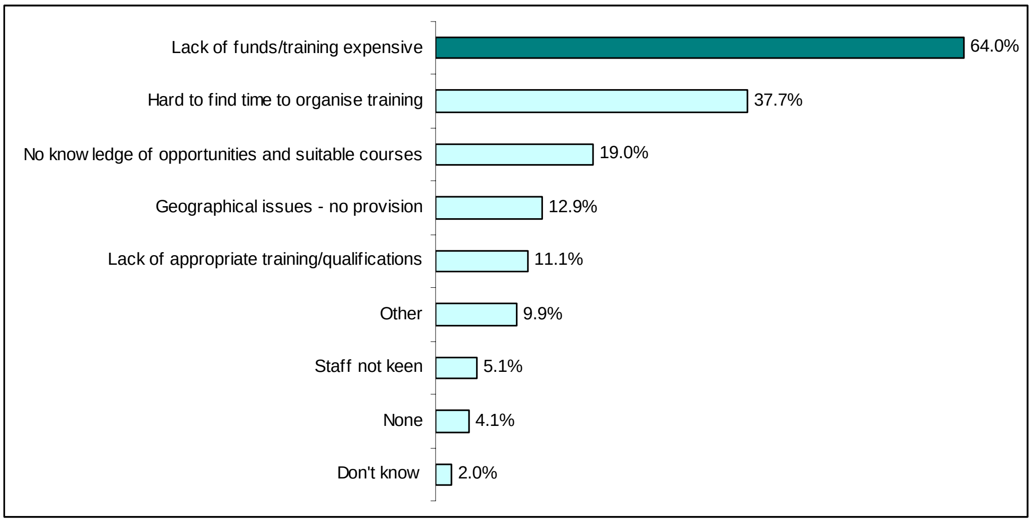


Figure notes: Sample base = 206 (filtered out businesses that would have liked to have provided more training over the previous 12 months).

6.4 Future training needs

Figure 6.5 presents the training that UK fencing businesses expect to need over the next 12 months. Of the responses reported, one quarter envisaged types of vehicle/machinery/tool usage training being required (e.g. chainsaw use, forklift driving and mini digger operation).

The second most common response from employers regarded 'health and safety' as training likely to be required in the next 12 months; this category accounted for almost 20% of total responses.

Figure 6.5 Future training needs

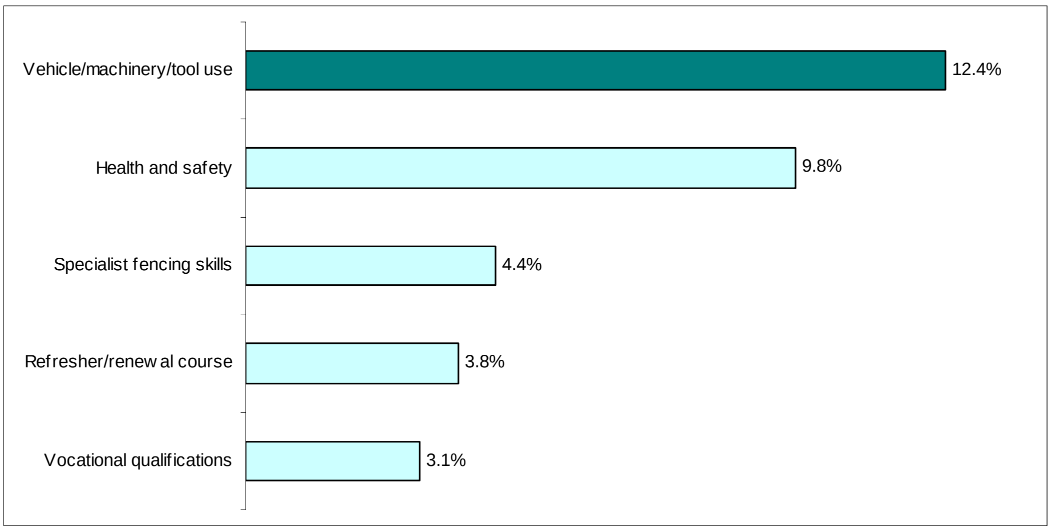


Figure notes: Sample base = 450

7 Conclusions

The main aim of this project was to identify the current skill needs and challenges within the fencing industry across the UK. To achieve this aim a number of objectives were set, all of which have been completed.

7.1 Industry characteristics

The fencing industry is dominated by micro businesses, those that employ fewer than ten members of staff. Businesses may often be small, but their work practices are varied as most businesses tend to diversify their operations across several fencing sub-industries.

The workforce within the UK fencing industry is largely full time and also evenly distributed in terms of age. The majority of workers are male and of white ethnic background. The job levels of the workforce are largely divided between three main Standard Occupational Classification groups: managers, skilled trades and in particular elementary occupations.

The majority of businesses see the ‘economic conditions’ as likely to be the key challenge facing the fencing industry over the next 12 months. This is supported by the extent and number of businesses that have reported falls in their turnovers in the previous 12 months and then further highlighted by the decline in employment.

Many businesses maintain an optimistic outlook for the future months, citing expectations that both turnover and employment numbers look set to increase or at least stabilise. The number of vacancies currently available and the extent to which these are hard to fill in the industry implies that a stabilisation of workforce numbers is the more likely of the two.

The evidence suggests therefore that the fencing industry’s optimism, although commendable, may be somewhat misplaced and is dependent upon factors outside of the industry’s hands. A surge in contract availability will be necessary to fulfil the expectation.

7.2 Skills challenges

Employment vacancies are low in the industry. However, of those that do exist, around half are reported to be hard to fill; this is largely due to a lack of interest from prospective applicants. However, in general around six in ten employers reported that when looking for new recruits they found problems identifying people with the right skills.

Skill gaps amongst the fencing workforce are low. This is likely due to the perception of fencing installers, the main job role within the industry, as a low skilled role categorised alongside elementary occupations (e.g. manual labourers).

The main cause attributed to the occurrence of skill gaps was a lack of experience rather than a lack of training. In accordance with this, the main course of action taken to overcome skill gaps was to provide more supervision to staff.

Nearly one-fifth of respondents felt that a lack of knowledge about viable training courses was a barrier to training provision. This indicates to industry that courses better suited to the industry's needs are required and that these need to be better publicised and more widely available to those working within the industry.

7.3 Training

Training levels are relatively low amongst the workforce, 40% of staff have received some form of training in the past 12 months. The main barrier to training identified by fencing businesses was a lack of funds (64% of businesses reported this). To emphasise this barrier, very few businesses seek assistance with funding through Government schemes. The majority of fencing businesses cover the full cost of staff training themselves, although very few businesses operate a training budget or training plan.

With the workforce declining in numbers in the past 12 months and wider economic conditions likely to continue to pose significant threats to many small businesses, the case for developing an efficient core workforce has never been stronger. To do this, fencing businesses will need to stay on top of the skill gaps in the current workforce to make these core workers effective. The challenge here is to overcome the main barrier to training, that being to improve knowledge of and access to funding assistance schemes.

7.4 Recommendations

The fencing industry needs to be promoted more to careers services as a viable career for young people. This research shows that leavers from the industry are not being replaced by new recruits.

Training providers and awarding bodies need to publicise fencing qualifications and certificates and the benefits of obtaining these. This research shows that employers feel applicants at present are not well-qualified for entering the industry. 19% of employers did not know where to access courses and this needs to be addressed.

31% of employers would consider offering an Apprenticeship, therefore the demand for this needs to be addressed and Apprenticeships in this industry publicised.

As only 20% of employees in the sector currently hold a FISS/CSCS card, a key recommendation would be to increase card holders and publicise the benefits of this.

8 Appendix A – Fencing questionnaire

INTRODUCTION:

Good morning/afternoon. Is this <INSERT NAME OF EMPLOYER>?

My name's <INSERT NAME> and I'm calling on behalf of Lantra who are conducting some important research into the UK fencing industry.

The main aim of this research is to identify skills, needs and challenges within the fencing industry, and the findings are expected to feed back into industry training policies and the development of qualifications that will ultimately benefit employers in the future.

The interview will take fifteen minutes or so. Would it be convenient to talk now?

[IF NOT CONVENIENT] Your views would be extremely valuable to us. When would be a good time to call you back? [Then arrange a time]

[IF CONVENIENT] Thank you. The information and views you provide will be treated in the strictest confidence.

[IF CONTACTING A BUSINESS IN WALES] First of all, may I ask if you have a preference for completing this interview in Welsh? **[If yes – explain that we will arrange for a colleague to call them back within the next few days]**

[IF NECESSARY] Lantra is the Sector Skills Council for the Land-based and Environmental sector, and is licensed by Government to boost skills levels and productivity across the UK. Their role is to help support businesses like yours by ensuring that training provision meets your needs.

- Contact at Lantra is Kate McCarthy if they would like to find out more about the survey (02476 696996 ext.249)

RECORD ALL REFUSALS:

Refusal (company policy)	1
Refusal (taken part in other survey recently)	2
Nobody at site able to answer questions	3
Not available in deadline	4
Refusal (no reason given)	5

SECTION A. BUSINESS INFORMATION

Q1. Which ONE of the following best describes the PRINCIPAL activity of your business?

- Fencing manufacture ☐
- Fencing supply ☐
- Fencing contractor ☐
- Fencing installer ☐
- Other ☐

If 'Other' please specify: ____________________

Q2. Which of the following fencing sub-sectors does your business operate in/with?

- Agricultural and stock fencing ☐
- High security fencing ☐
- Electrical fencing ☐
- Environmental fencing ☐
- Vehicle restraint systems ☐
- Residential fencing ☐
- Automatic gates and access barriers ☐
- Other ☐

If 'Other' please specify: ____________________

Q3. What challenges do you anticipate your business will face over the next 12 months?

- Economic conditions (e.g. effects of recession) ☐
- Increasing competition ☐
- Attracting appropriately skilled staff ☐
- Labour costs ☐
- Geographic location ☐
- Cash flow ☐
- Seasonality of business ☐
- Keeping existing customers/business ☐
- Other (please specify below) ☐
- No particular challenges ☐
- Don't know ☐

If 'Other' please specify: ____________________

SECTION B. WORKFORCE CHARACTERISTICS

Q4. Overall, how many people are employed at this business location? (Include both full time and part time staff; *do not* include outside contractors/agency staff or the self employed): ☐

Q5. How many of these staff are employed on a full-time basis? ☐

Q6. How many of these staff are employed on a part-time basis? ☐

Q7. What is the gender split of staff at this business location? (Approximate if necessary)

Number that are female: ☐ Number that are male: ☐

Q8. Approximately how many of the staff members are aged:

16-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55-64 yrs	65 and over

Q9. How many of your staff identify with each of the following ethnic groups:

White	Mixed	Asian or Asian British	Black or Black British	Chinese	Other ethnic group

Q10. How many staff within this business are employed in the following occupations? [Select response based on the highest proportion of time spent per staff member]

Managers	
Supervisors	
Skilled manufacturers	
Fence installers	
General labourers (e.g. 'mate')	
Sales staff	
Administrative staff	
Other	

If 'Other' please specify: ....

SECTION C. RECRUITMENT

Q11. How many new recruits has your business taken on in the past 12 months? ☐

Q12. How many people in total have left the business in the last 12 months (including any sub-contractors)? ☐

Q13. In looking ahead to the next 12 months, how do you see your workforce changing in terms of numbers?

Increasing ☐
Remaining the same ☐
Decreasing ☐
Don't know ☐

Q14a. Do you currently have any employment vacancies for either full-time or part-time roles at this business location?

Yes ☐ No☐ [Go to Q18] Don't know ☐ [Go to Q18]

Q14b. How many vacancies do you have? ☐

Q15. In which occupations do you have vacancies?
*(specify the **number** of vacancies in each occupation)*

Managers	
Supervisors	
Fence installers	
General labourers (e.g. 'mate')	
Sales staff	
Administrative staff	
Other	

If 'Other' please specify: ________________________________

Q16a. Are any of these vacancies proving hard to fill?

Yes ☐ No☐ Don't know ☐

Q16b. If 'yes' to previous question, how many vacancies are proving hard to fill? ☐

Q17. What do you feel are the main causes for your business having a hard to fill vacancy?

PROMPT if necessary

- Too much competition from other employers ☐
- Lack of interest in this type of work ☐
- Low pay and benefits compared to other types of work ☐
- Applicants lacking the required attitude and motivation ☐
- Applicants lacking the required skills ☐
- Applicants lacking work experience ☐
- Applicants lacking suitable qualifications ☐
- Poor career progression/lack of prospects ☐
- Job entails unsociable hours/shift work ☐
- Remote location/poor transport ☐
- Other ☐
- Don't know ☐

If 'Other' please specify: ....

Q18. To what extent do you agree or disagree with the following statements?

	Agree strongly	Agree	Disagree	Disagree strongly
"When looking to take on new recruits, we have problems finding people with the skills that we need"	☐	☐	☐	☐
"The education system does not supply enough people equipped with the skills they need to start working with us"	☐	☐	☐	☐
"Holding on to valued members of staff presents us with a significant problem"	☐	☐	☐	☐

Q19. What skills, if any, have you found difficult to obtain from applicants?

PROMPT if necessary

- Management skills ☐
- Technical, practical or job specific skills ☐
- Written communication skills ☐
- Oral communication skills ☐
- Customer handling skills ☐
- Team working skills ☐
- Problem solving skills ☐
- IT skills ☐
- Office admin skills ☐
- Literacy skills ☐
- Numeracy skills ☐
- Foreign language skills ☐
- Other ☐
- Don't know ☐

Record specific skills:

SECTION D. SKILLS ISSUES AMONGST CURRENT WORKFORCE

Q20. To what extent do you agree or disagree with the following statement?

	Agree strongly	Agree	Disagree	Disagree strongly
"My current staff have the skills they require to undertake their roles proficiently"	☐	☐	☐	☐

Q21. What skills, if any, do you feel your staff lack proficiency in?

PROMPT if necessary

- All staff are fully proficient ☐
- Management skills ☐
- Technical, practical or job specific skills ☐
- Oral communication skills ☐
- Written communication skills ☐
- Customer handling skills ☐
- Team working skills
- Problem solving skills ☐
- IT skills ☐
- Basic numeracy skills ☐
- Basic literacy skills ☐
- Office admin skills ☐
- Foreign language skills ☐
- Other ☐
- Don't know ☐

Record specific skills:

If 'all staff are fully proficient' move straight to SECTION E.

Q22. What are the main causes of some of your staff not being fully proficient?

- Failure to train and develop staff ☐
- Recruitment problems ☐
- High staff turnover ☐
- Inability of workforce to keep up with change ☐
- Lack of experience or staff having been recently recruited ☐
- Staff lack motivation ☐
- Other ☐
- Don't know ☐

If 'Other' please specify: ______________________________

Q23. Which of the following outcomes result from staff not being fully proficient?

- Lose business or orders to competitors ☐
- Delay developing new products or services ☐
- Have difficulties meeting quality standards ☐
- Increasing operating costs ☐
- Have difficulties introducing new working practices ☐
- Increase workload for other staff ☐
- Outsource work ☐
- No problems ☐

Q24. What actions, if any, is the business taking to overcome the fact that some of the staff are not fully proficient in their job roles?

- Increase training activity/spend ☐
- Increase recruitment activity/spend ☐
- More staff appraisals/performance reviews ☐
- Implementation of mentoring/buddying scheme ☐
- More supervision of staff ☐
- Nothing ☐
- Other ☐
- Don't know ☐

If 'Other' please specify: ____

SECTION E. TRAINING ACTIVITY AND DEVELOPMENT

Q25. Does your business have a training plan that specifies in advance the level and type of training that your employees will need in the coming year?

Yes ☐ No☐ Don't know ☐

Q26. Does your business have a specific budget for training expenditure?

Yes ☐ No☐ Don't know ☐

Q27. What percentage of your staff has an annual performance review? [%]

Q28a. Does your business offer Apprenticeships (or Modern Apprenticeships) for which you or a training provider would receive Government funding?

Yes ☐ No☐ No, but possibly in the future☐ Don't know ☐

Q28b. If 'No' to the last question, what are the main reasons why you don't offer Apprenticeships to new or existing staff?

- Don't know enough about the Apprenticeship schemes ☐
- The Apprenticeships available are not relevant
- All staff fully trained ☐
- We prefer to recruit fully trained/qualified staff ☐
- Insufficient financial incentive to justify the time involved ☐
- Other ☐

If 'Other' please specify: ______________________________

Q29. Has your business arranged <u>any</u> training for staff over the last 12 months, whether on or off the job?

Yes ☐ No☐ [Go to Q36] Don't know ☐ [Go to Q36]

Q30. Over the last 12 months how many staff employed at this location have received training, including any that have since left? ☐

Q31. Over the last 12 months, on average, how many days of training have you arranged for each separate member of staff? ☐

Q32. Could you tell us what form of training was arranged for staff?

On the job training		**Off the job training**	
Supervision of colleagues	☐	Conference or seminar (provide further details)	☐
Shadowing	☐	Training course (provide further details)	☐
Other (state below):	☐	Other (state below):	☐

PROMPT: Opportunity to add further elaboration on training provided/courses attended:

Q33. How did your business fund the training provided to staff?

- Business funded full cost of training ☐
- Government funded scheme (e.g. train to gain) ☐
- Both ☐

Q34. How many of your staff received Government funded training? ☐

Q35. Do you formally assess whether the training and development received by an employee has had an impact on their performance?

Yes ☐ [Go to Q37] No☐ [Go to Q37] Don't know ☐ [Go to Q37]

Q36. If you stated that you have not arranged/funded any training for your staff over the past 12 months, what are the main reasons for this?

All staff are fully proficient ☐
The courses we're interested in are not available locally ☐
The quality of the course or course providers is not satisfactory ☐
Difficult to get information about the courses available locally ☐
The start dates or times of the courses are inconvenient ☐
External courses are too expensive ☐
Managers have lacked time to organise ☐
Employees are too busy to attend training courses ☐
Other ☐
Don't know ☐

If 'Other' please specify: ____

Q37. If you could have done, would you have provided MORE training for your staff than you were able to over the last 12 months?

Yes ☐ No ☐ Don't know ☐

Q38. What barriers have prevented your business from providing more training to employees over the last 12 months?

Lack of funds/training is expensive ☐
Staff not keen ☐
Lack of provision (geographical issue) ☐
A lack of appropriate training/qualifications in the subject area we need ☐
Hard to find the time to organise training ☐
Lack of knowledge about training opportunities and suitable courses ☐
Other ☐
Don't know ☐
None ☐

If 'Other' please specify: ____

Q39. In looking to the future, what training do you envisage will be needed by your staff over the next 12 months?

SECTION F. INDUSTRY PERFORMANCE

And finally, the following information will enable us to estimate the value of the fencing industry to the UK economy and to evaluate the industry's performance in light of the current recession.

Q40. Would you mind telling us what your business's turnover was for the last 12 month period, or your last accounting year?

PROMPT if necessary:

Less than £50,000	☐	£250,000 to £500,000	☐	£2 million to £3 million	☐
£50,000 to £100,000	☐	£500,000 to £1 million	☐	£3 million+	☐
£100,000 to £250,000	☐	£1 million to £2 million	☐		

Q41. Over the last 12 month period recorded, and after taking into account inflation, has your business's total sales turnover:

- Increased a lot (up by more than 10%) ☐
- Increased slightly (up by between 0-10%) ☐
- Remained the same ☐
- Decreased slightly (down by between 0-10%) ☐
- Decreased a lot (down by more than 10%) ☐
- Been in operation less than 12 months ☐
- Don't know ☐

Q42. Thinking about the next 12 months, and after taking into account inflation, do you expect that your business's turnover will:

- Increase a lot (by more than 10%) ☐
- Increase slightly (up by between 0-10%) ☐
- Remain the same ☐
- Decrease slightly (down by between 0-10% ☐
- Decrease a lot (down by more than 10%) ☐
- Don't know ☐

That's the end of the questionnaire.

THANK AND CLOSE

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Lantra

Lantra is the Sector Skills Council supporting skills, training and workforce development for businesses in the environmental and land-based sector. We are committed to helping everyone access the training, qualifications, skills and knowledge they need for business success and to develop their career.

We are an independent, UK-wide organisation that is owned and managed by our industries, which are grouped around land management and production, animal health and welfare and environmental industries.

We lead the way in understanding our industries' future skills and business needs. We work together with trade organisations, unions, training providers, governments and many more to maximise investment in skills.

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