

# **Research Report**

## **Guernsey Employer Skills Survey 2014**

**Prepared for: States of Guernsey Commerce and  
Employment Department and Skills Guernsey**

**Prepared by: BMG Research Ltd**

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## 1 Executive Summary

The States of Guernsey of Commerce and Employment Department and Skills Guernsey commissioned the 2014 Guernsey Employer Skills Survey which was undertaken in July and August 2014.

The main aims of the survey were:

- To establish the composition of Guernsey's current workforce and the skills attributes of that workforce;
- To ascertain current and potential skills gaps in different sectors of the Guernsey economy;
- To describe current conditions in the island's economy and, more specifically, in Guernsey's labour market.

Of these aims, the main focus is the identification of skill shortages and gaps with a view to addressing skills gaps to increase productivity and competitiveness across the Guernsey economy and assisting in reducing reliance on imported labour.

In total, 318 telephone interviews were conducted with Guernsey employers in both the private and public sector. The data reported is related to the establishment at which the respondent is based, rather than the entire enterprise in the case of multi-site organisations.

### 1.1 Summary of employer profile

Based on information provided on the Guernsey Quarterly Labour Market Bulletin March 2014, there are approximately 1,800 employers (2 or more employees) located on the island of Guernsey.

- 70% are micro-businesses, employing between 2 and 10 employees;
- 26% are small businesses, employing between 11 and 50 employees;
- 5% are medium to large businesses, employing more than 50 employees.

In terms of their contribution to employment on the island, medium to large businesses account for a third of the workforce (36%).

The majority of employers (91%) operate within the private sector.

The three most significant industry sectors in Guernsey include finance (17% of all establishments); wholesale and retail (16%) and construction (15%). A further one in ten (10%) operates in hostelry.

Two-thirds of employers (67%) are single site businesses. Amongst multi-site organisations, more than a quarter operate in the finance sector and around half of all multi-site organisations have other sites based on Guernsey.

Seven in ten establishments (70%) have been trading in Guernsey for at least 10 years. One in ten has traded in Guernsey for no more than 5 years.

Three-fifths of employers (60%) employ staff on a part-time basis, with part-time employees accounting for an estimated 21% of all employees. A third of all staff employed on a part-time basis (34%) is employed in administrative and secretarial occupations.

One in eight employers (13%) employ staff on zero-hours contracts, with an estimated one in twelve employees (8%) employed on this flexible basis. Zero-hours contracts are more frequently employed within service sectors than across production and construction sectors.

### 1.2 Recruitment and skill shortages

Over the last 2 to 3 years, 77% of Guernsey employers have recruited staff. More than half of all employers (56%) have had vacancies in the last 12 months.

A third of employers (34%) that have recruited staff in the last 2 to 3 years have taken on someone into their first job on leaving school, college or university. This equates to a quarter of all employers (26%).

This proportion increases with business size, with just 16% of all employers with between 2 and 10 employees recruiting someone into their first post-education job, compared with 66% of employers with 26 or more employees.

Employers are most likely to have recruited 17 or 18 year olds into their first job from school (45% of those that have recruited education leavers) and least likely to have recruited 16 year olds just out of school (31%).

Sixteen year old school leavers are considered to be the most poorly prepared for work (52% very/poorly prepared), whilst university/HE leavers are considered to be the most well-prepared (96% very/well prepared).

While poor attitudes and low motivation are a particular issue for 16 to 18 year olds, a lack of the required skills or competencies is a more significant issue for university/HE leavers.

More than a quarter of employers that have recruited in the last 2 to 3 years (27%) have recruited staff requiring a housing licence. This increases to 56% in businesses with 26 or more employees.

The posts for which housing licences are most likely to have been required are managerial, skilled trades, and elementary administration and service occupations. Professional occupations also feature prominently. These are the occupational groups in which demand for staff is least likely to be met from labour available on the island.

The most frequently cited reason for recruiting staff who require housing licences is that the skills required are not to be found locally (61% of that have recruited staff from off the island).

More than a quarter of all employers (28%) had vacancies at the time of the survey. This is a higher proportion than amongst employers interviewed in the UKCES Employer Skills Survey in 2013 (15%).

Nearly two-thirds of employers with current vacancies (64%) reported at least some of them a being hard-to-fill. As a proportion of all employers, this equates to 18%, which is considerably higher than the 2013 UKCES Employer Skills Survey figure of 5%.

Recruitment difficulties are particularly prevalent in the finance, education and health, and professional, scientific & technical sectors. They are most likely to have been for skilled intermediate level and higher order occupations, including skilled trades, administrative and secretarial posts, associate professional, and professional occupations.

A low number of applicants with the required skills is the predominant reason for recruitment difficulties, and the second and third most frequently cited reasons also concern a low number of applicants in general.

Overall, 14% of Guernsey employers have experienced recruitment difficulties due to skill shortages. This compares with the 4% of employers reported by the UKCES Employer Skills Survey 2013.

Technical, practical or job specific skills are most frequently cited as being difficult to obtain. These skills will vary widely by sector and even within sectors.

The main impact of recruitment difficulties is an increased workload for existing staff. Ninety per cent of employers with hard-to-fill vacancies cite more pressure on the current workforce, whilst around half are losing business or orders to competitors, delaying the development of new products or services, having to accommodate higher operating costs, or experiencing difficulties in introducing new working practices or in meeting customer service objectives.

Nearly a quarter of all employers (23%) report workforce growth in the last 12 months. One in eight employers (13%) reports a reduction in the size of their workforce.

There has been a significantly greater than average likelihood of a reduction in the size of the workforce in the public sector (32%).

Looking ahead to the next 12 months, a quarter of employers anticipate workforce growth (25%), with just 5% expecting a reduction in the size of the workforce.

Employers within the finance and professional, scientific & technical sectors are significantly more likely than average to anticipate workforce growth (40% and 43% respectively).

One in seven employers (14%) reports it difficult to retain staff. This proportion is particularly high in hospitality (25%), education and health and public administration (25%) and construction (28%).

Competition from other employers including the relatively high wages offered by other employers is amongst the main reasons for losing staff.

### **1.3 Skill gaps and skill development**

Three in ten employers (29%) reports skill gaps amongst their existing workforce. This is a higher proportion than that reported by the UKCES Employer Skills Survey 2013 (15%). It suggests that Guernsey employers are more likely than the UK average to face the challenges of maintaining skill levels and of up-skilling their workforces.

The proportion of employers with skill gaps in their workforce increases to 82% of employers with more than 50 employees and it is significantly higher than average within the finance sector (43%).

Eight per cent of the workforce is reported as not being fully proficient in their job roles. This compares with 5% of the UK workforce, as reported in the UKCES Employer Skills Survey 2013.

A quarter of staff (across all but the public administration sector) that is not fully proficient is in administrative and secretarial occupations (25%). Professional occupations are next most likely to have the need for further skill development (16% of all skill-deficient staff).

Partially completed training and being new to the role are the main reasons for staff not being fully proficient in their jobs. However, more than two-fifths of employers with skill gaps in their current workforce cite being unable to recruit staff with the required skills as the reason.

Technical, practical or job specific skills are most frequently mentioned as the skills lacking in the existing workforce. This is particularly the focus of skill needs amongst employers in production and construction sectors.

As was the case for recruitment difficulties, skill gaps in the existing workforce are most likely to be putting pressure on other staff, increasing their workload.

The majority of employers with skill gaps (89%) intend to address their staff's skill needs through training and development activity.

### 1.4 Staff training and development

Around half of all Guernsey employers have a training budget (48%), while the proportion that have a training plan in place for each employee is slightly higher (54%).

The propensity to have either in place increases with business size, as does the propensity to fund or arrange training at all.

The majority of employers (81%) report having formal written job descriptions for each employee.

Two-thirds of employers (64%) report undertaking annual performance reviews with employees. This increases to 89% of businesses with more than 50 employees.

Service sectors, in particular finance and education, health, and public administration, are more likely than production and construction sectors to have any of this training and development infrastructure in place within Guernsey

The provision of training, both on- and off-the-job, is at a higher level within Guernsey than the UK average. Overall 76% of Guernsey employers have funded or arranged any training for employees in the last 12 months. This compares with 66% as reported in the UKCES Employer Skills Survey 2013. Within Guernsey, 65% of employers have funded or arranged any off-the-job training, compared with 49% across the UK; 61% have funded or arranged any on-the-job training, compared with 52% across the UK.

Levels of training are significantly higher than average in finance, education, health, and public administration and the professional, scientific & technical sector. There is relatively little training undertaken in the wholesale, retail & repair sector.



Three-fifths of employers that have funded or arranged training (59%) have used a trainer or training company from off the island of Guernsey to deliver any of it.

This proportion is particularly high in large businesses and in the education, health, and public administration sector, as well as amongst multi-site businesses.

Technical skills and health & safety/first aid training are the types of training that employers are most likely to have arranged or funded in the last 12 months. This reflects the national picture, as suggested by the UKCES Employer Skills Survey 2013.

While induction training and training in new technology are most likely to have been delivered as on-the-job training, training towards professional qualifications is particularly likely to have been delivered off-the-job. The majority of employers have undertaken health & safety/first aid training and management training off-the-job.

More than three-quarters of employers that have funded or arranged training have used in-house facilities (78%). Larger businesses are more likely to have these facilities.

More than half of the employers who have funded or arranged training (56%) have used local training providers. This is more likely amongst single site than multi-site businesses, except those whose multiple sites are all located on Guernsey. Multi-site businesses are more likely than single site organisations to use off-island trainers to deliver training.

On-line training is on a par with in-house training in terms of the extent to which it is delivered within large businesses. Within businesses with more than 50 employees, 94% deliver training on-line; while 95% deliver it in-house.

Seventy per cent of employees (excluding the public administration sector) have received training and development in the last 12 months. Of all employees that have received training, 60% are employed in businesses that employ more than 25 staff.

Managers, directors and senior officials are the occupations most likely to have been provided with training and development opportunities. More than three-quarters of employers that have funded or arranged training or development have trained these staff. Just under half of employers that have trained have provided training to administrative and secretarial occupations.

However, managers, directors and senior officials account for just 16% of all employees that have received training, while staff in administrative and secretarial occupations account for 17%.

By far the most common reason for not funding or arranging training for employees is that staff are already fully proficient i.e. there is no need for training.

One in four of all employers (regardless of whether they have recently funded or arranged training or not) (23%) report areas of training that are lacking on the island. The range is extensive and no one area is mentioned by more than 10% of these employers. The most frequently mentioned areas include: IT/computers; finance/accountancy/tax; food/hospitality; healthcare; and sales/customer service. A few employers highlight the need for more funded courses.

Table 1.1: Key indicators

	Guernsey 2014	National comparison
<b>Recruitment:</b>		
Recruited in the last 2-3 years	77%	
Recruited any education leavers	26%	27% (UKCES ESS 2013)
Recruited staff that required a housing licence	27%	
<b>Current vacancies:</b>		
Have current vacancies	28%	15% (UKCES ESS 2013)
Have hard-to-fill vacancies	18%	5% (UKCES ESS 2013)
Have hard-to-fill vacancies due to skill shortages	14%	4% (UKCES ESS 2013)
<b>Workforce growth:</b>		
Increased in the last 12 months	23%	
Reduced in the last 12 months	13%	
Anticipate an increase in the next 12 months	25%	
Anticipate a decrease in the next 12 months	5%	
Have difficulties in retaining staff	14%	
<b>Skill gaps:</b>		
Report skill gaps in the workforce	29%	15% (UKCES ESS 2013)
Proportion of the workforce with skill gaps	8%	5% (UKCES ESS 2013)
Employers with skill gaps that intend to address these through training	89%	
<b>Training:</b>		
Have a training budget	48%	
Have a training plan for each employee	54%	
Have written job descriptions for each employee	81%	
Conduct annual performance reviews	64%	
Have funded/arranged any training in the last 12 months	76%	66% (UKCES ESS 2013)
Funded/arranged off-the-job training	65%	49% (UKCES ESS 2013)
Funded/arranged on-the-job training	61%	52% (UKCES ESS 2013)
Proportion of all private sector employees that have received training in the last 12 months	70%	

## 1.5 Discussion regarding the key findings

The survey identifies a number of key findings and these are now discussed.

A first point is that the survey confirms some characteristics of Guernsey's economy which will be well-recognised by Guernsey's government:

- As in most other economies, small employing establishments predominate – seven out of ten have 10 or fewer employees and nearly four out of five have 25 or fewer employees.
- However, the sector structure of the economy is not typical of the UK economy as a whole. For example, the economy has a large financial services sector, with around 17% of employing establishments being located in this sector, compared with a UK average of 2.5%<sup>1</sup>. Construction, too, supplies a relatively large proportion of employing establishments; 15% compared with a UK national average of around 8%. There is, conversely, relatively little manufacturing activity on the island. Manufacturing accounts for only 3% of establishments compared with a UK average of 8% and most of Guernsey's manufacturing units are small – 80% employing 10 or fewer employees and 95% employing 25 or fewer people.
- Guernsey has a substantial base of established businesses: Seventy percent of Guernsey businesses, particularly larger ones, have traded for 10 years or more (around 64% across the UK<sup>2</sup>) whilst only around 4% of Guernsey businesses have traded for 3 years or less (11% across the UK). The age distribution of Guernsey's businesses can, perhaps, be regarded both positively and negatively: On one hand, a 'solid' base (given that smaller, young businesses tend to have a high attrition rate) of mature businesses but, on the other hand, a relatively non-dynamic economy with low rates of new business formation.
- Though Guernsey's economy is obviously that of an island, it is not insular: a third of establishments are parts of multi-site organisations and, of these, 65% are part of organisations with other sites in the UK and 47% are part of organisations with other sites outside the UK. Thus, overall, around 21% of Guernsey establishments have a UK connection (other than that simply through trade) and around 15% have an international connection (note: these latter two percentages are not additive since some Guernsey establishments will be branches or headquarters of businesses with other sites both in the UK and in other non-UK companies). Again, this high degree of external linkage can be viewed both positively and negatively. On the positive side, external connection clearly offers substantial wealth-generating potential which operation within an isolated economy does not and may, through interaction with a wider economy, promote the business skills and knowledge which competitiveness requires. On the other hand, Guernsey branches of businesses headquartered outside of Guernsey may be vulnerable to

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<sup>1</sup> UK statistics from the UKCES' Employment and Skills Survey 2013

<sup>2</sup> UK statistics from BIS's Small Business Survey 2012

investment/disinvestment decisions which are not necessarily to Guernsey's advantage (although, as above, the stability of Guernsey's business population argues that the advantages of connectivity are likely to outweigh this potential disadvantage).

- Corresponding to variations in the sector structure of the economy noted above, jobs available on the island diverge from UK overseas in some particular categories. Comparisons are not exact because our occupational analysis for Guernsey separates public administration from other sectors, whereas national data does not. However, allowing for this lack of exact comparability, the proportion of administrative jobs is higher in Guernsey (23% compared with 11% in the UK as a whole<sup>3</sup>) whilst the proportion of skilled and semi-skilled manual jobs is low (11% compared with 17% across the UK).
- There is further labour market divergence in that Guernsey is estimated to have a lower proportion of part-time jobs than the UK (21% compared with 27%<sup>4</sup>) but, perhaps correspondingly, Guernsey is estimated to have a higher proportion of people working on zero hours contracts than in the UK (8% compared with 2%). These latter employment terms are most frequent in the transport sector (perhaps taxi drivers) and in the education and health sector (perhaps care workers).

Whatever the positive and negative features of Guernsey's economic and labour market structures, at present they appear to be working to Guernsey's net advantage. A quarter (23%) of surveyed employers reported employment increases in the last year compared with 8% who reported employment decreases, with the net balance being positive in all sectors except retail and real estate and administrative services and across all size groups of firms. Business confidence is also positive with 25% expecting to increase employment in the next year whilst only 5% expect decreases in employment levels. In this 'future' case, all sectors have positive balances in favour of growth but, perhaps encouragingly for particularly important local sectors, the finance and professional, scientific and technical services sectors have large positive net balances (+34% and +41% respectively) in favour of anticipated growth.

It should be noted that this broadly positive picture needs the caveat that results reported in the survey are based on proportions of employers reporting change in workforce numbers which are not weighted by the actual numbers of jobs gained or lost. It is possible that companies which shed jobs lost more jobs in total than companies which increased their numbers of staff gained in total. However, the next paragraphs, which describe a number of indicators of a tight local labour (that is, one in which there is little excess of labour and skills), suggest that that caveat may not actually apply.

Considering some labour market conditions in more detail, the survey shows that, though Guernsey's economy, and, hence, its labour market, is small, it is far from static. Seventy-seven percent of employers have recruited staff in the last 2 to 3 years; 56% of employers had had vacancies in the last 12 months; more than a

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<sup>3</sup> Annual Population Survey, ONS, 2014

<sup>4</sup> ONS Labour Market Statistics, September 2014

quarter of employers (28%) had current vacancies at the time of survey (compared with 15% of UK employers in UKCES's national Employer Skills Survey of 2013). In addition, one in seven employers (14%) reported difficulty in retaining staff mainly because of competition, including wage competition, from other employers.

These figures, implying considerable mobility of workers between employers (since employees are more likely to move when jobs are not in short supply), suggest a tight labour market. However, the survey provides more direct evidence of that. Not only does Guernsey, as above, have a high level of vacancies, it also has more difficulty filling them. Sixty-four percent of employers with vacancies report at least some of their current vacancies as being hard-to-fill. This statistic translates to 18% of all Guernsey's employers as having at least one hard-to-fill vacancy at the time of survey (compared with the 5% of UK employers with hard-to-fill vacancies in the UKCES Employer Skills Survey of 2013); and 14% (compared with 4% of the UK's employers in the same survey) had a skills shortage vacancy (that is, one which occurs because skills are not available rather than for other reasons). Recruitment difficulties and skill shortages are found across the occupational spectrum but are most frequent in relation to a range of intermediate and highly skilled jobs which are particularly critical to the island's economy: Skilled trades, administrative, associate professional and technical, and professional occupations.

The most frequent impact of recruitment difficulties is increased workload on existing staff (reported by 90% of employers with difficulty). This may not be wholly negative since it may imply increased labour productivity but other reported effects including loss of business, less innovation, higher operating costs, and diminution of customer service are clearly negative ones.

On top of recruitment difficulty, and interactive with that difficulty, Guernsey employers also report a relatively high incidence of skill gaps in their existing workforces. Twenty-nine percent of Guernsey employers (compared with 15% in UKCES's Employer Skills Survey of 2013) report such gaps. Many of these gaps are essentially caused by the labour mobility which was pointed to above: the most common reasons for skills gaps reported in the survey were that employees' training was incomplete (presumably because of relative newness in post) and, more directly, because employees had only been recently recruited. However, inability to recruit sufficient skilled staff was reported by 45% of employers with skills gaps as a reason for those gaps and 37% gave lack of staff motivation as a reason – which, again, may relate to staff mobility in that workers who feel free to move jobs easily or who are in the process of arranging to do so may be less likely to be committed to their jobs.

Generally, thus, the survey presents a picture of strains in Guernsey's labour market contingent on growing demand for labour and skills.

However, the survey also points to two particular issues which may also be implicated to a lesser degree.

The first relates to the flow of labour and skills into the workforce at the 'bottom end' – the island's ability to recruit young people leaving full-time education at various stages. A quarter (26%) of all employers in Guernsey had, in the last 2 to 3 years, recruited someone into a first job after leaving school, college or university. Recruitment of 16 year old school leavers was least frequent – by 31% of the 26%, as above, who had

recruited education-leavers at any stage (or around 8% of all Guernsey employers). Thirty-five percent (9% of all employers) had recruited 17 or 18 year old FE leavers, 39% (10% of all employers) had recruited new graduates, and 45% (12% of all employers) had recruited 17 or 18 year old school leavers.

The question, concerning the quality of this form of labour supply, concerns the degree to which these young people were equipped for work. To some extent, this is a matter of perception and expectation. Clearly inexperienced young people cannot generally have either the maturity or competence or social skills which are expected of older people and the allowance which employers make for this is a factor in their assessments of young recruits' fitness for work which may vary – essentially, employers' judgements include some subjectivity as well as being objective evaluations of young recruits' abilities and attitudes.

However, whilst recognising this, there are still some figures generated by the survey which raise some concerns about Guernsey's young labour supply. Thus, comparing employers' views on the extent to which young recruits were or were not well-prepared for work, Guernsey employers were less positive about two of four groups than were employers in England (in the UKCES Employer Skills Survey of 2013). Thus, the proportions saying recruits were either well-prepared or very well-prepared were: 16 year old school leavers, Guernsey 45%, England 59%; 17-18 year old FE leavers, Guernsey 66%; England 74% – that is, the statistics suggest Guernsey has a disadvantage in these cases. However, 17-18 year old school leavers were more frequently seen as better prepared in Guernsey (70%, compared with 66% in England) and at graduate level Guernsey employers were also more satisfied than English employers (96%, compared with 84%). The problems, thus, seem to attach not so much to young people who follow academic routes but to those, perhaps with less academic qualifications at GCSE level, who seek to enter work directly at age 16 or who take vocational or mixed vocational/academic courses in FE. Where young people are seen as less than well-prepared (in any of the age 16 or age 17/18 leaver groups) the problems mostly concern poor attitudes and lack of motivation rather than lack of competence and skill (which is more often a problem in relation to the low proportion of graduate recruits with whom Guernsey employers were dissatisfied) – it is perhaps the case, referring to the discussion above, that employers of young people *are* prepared to make allowances for lack of technical skill or knowledge but are less willing to make allowances for indifferent work ethic.

Overall, the analyses above, including those in which Guernsey comes off worse in comparison with England, need to be treated cautiously since the Guernsey samples of employers who had recruited each group (between 34 and 54 cases) were very small. However, there is, perhaps, enough anecdotal evidence, including that from across the UK, supporting similar findings of employer concern about some young people's work readiness to emphasize the continuing importance of employability skills development in Guernsey's school and FE sector.

A second particular issue (arising from observation of Guernsey's skills supply limitations) may concern Guernsey employers' ability to import labour and skills. Simply, 27% of employers who recruited in the last 2 to 3 years reported that they had recruited staff requiring a housing licence. In unprompted questions, inability to get a housing licence was scarcely mentioned as a recruitment difficulty but was mentioned

by 20% of employers reporting difficulty in *retaining* staff. The survey was not directed to any detailed exploration of the sensitive housing licence and migrant labour issues but they are ones of which Guernsey's government will be clearly aware in considering the balance of labour and skills demand and supply on the island.

One of the key *responses* to skills shortages and gaps available to employers is staff training.

The survey shows that substantial proportions of Guernsey employers have key elements of the infrastructure to support training. Thus, 81% have formal job descriptions (the statements of competences and duties against which needs for individual development can be judged) for staff, 64% of employers provide staff with annual performance reviews (a means of identifying shortfalls in performance which may require training to counteract), 54% have training plans for their staff, and 48% have training budgets.

In terms of actual training, perhaps in response to Guernsey's more acute skills pressures noted above, higher proportions of Guernsey employers supply training than do UK employers generally (the latter indicators deriving from the UKCES Employer Survey of 2012). Thus, 65% of Guernsey employers trained staff off-the-job (49% in the UK), 61% trained staff on-the-job (52% in the UK), and 76% provided either form of training (66% in the UK).

Perhaps unsurprisingly, given these significant proportions of employers supplying training and the inherently-likely wide variation in the types of training needed, a high proportion of employers needed to source at least some of their training off-the-island – 59% of employers who train did so – and there is substantial use of on-line training – this method being used by nearly half (46%) of employers who trained.

One particular issue with training supply on Guernsey *may* concern the relatively high minorities of employers who are less than satisfied with training provision on Guernsey. There may be an inherent tendency (observed by the authors in similar studies elsewhere in the UK) for public provision to be rated less highly than private provision. The former usually has a broad remit, involving public education functions as well as directly employer-related ones, and is often directed to accredited qualifications which take relatively lengthy periods to acquire. The latter is likely to be extremely focussed (for example, on a particular professional qualification) or to be short training, often tailored to individual employers' particular needs. Generating universal employer approbation may be a more difficult challenge in the 'public' case than in the 'private' one, essentially because the two sectors do not have the same function and remit. However, having said that, it may be worth reflecting on if and how Guernsey's suppliers of public post-16 training suppliers could and should be more responsive to local employer needs.

Particularly, when asked directly about the adequacy of training supply on Guernsey, 23% of employers (and 42% of businesses with between 26 and 50 staff) saw the current position as less than adequate. However, when asked to identify specific local gaps, the wide range of types of gaps in local provision, with no single clear foci of demand, raises the considerable difficulty of supplying, cost effectively, the training which would be needed to satisfy a significant number of currently dissatisfied employers.

Finally, in summary of the various discussion points above, a brief 'strengths' and 'weaknesses' analysis is set out below. Three general points should be made about this analysis.

First, an overall point is that the analysis should be conditioned by recognition of Guernsey's basic circumstance – operating a strengthening economy within the confines of an island geography. Essentially, in having some labour and skills supply shortfalls, the island is 'the victim of its own success'. Such problems tend to be more prevalent in strong economies and labour markets than in weak ones – with the obvious further point being (given that it is difficult, at any time and in any place, to achieve a perfect balance between labour and skills demand and supply) that, from a public welfare perspective at least, it is better to have excess demand, as revealed in this survey, than to have excess supply.

Second, in this light, the further point is that Guernsey, whilst currently successful in economic terms, is not immune from global, European, and UK economic conditions. There are obvious current uncertainties and threats affecting these wider economies of various kinds and in various regions. Public labour market policy clearly needs to respond where it can to current pressures but also needs to recognise the economic volatilities which may substantially reduce those pressures if negative economic forces prevail in Guernsey's external markets. The essential point may be that policy should invest in structural reform which is beneficial whatever the longer term economic conditions rather than over-respond to cyclical circumstances.

The third general point is that the 'strengths' and 'weaknesses' identified are mostly those suggested by the survey and some UK national comparators. They are, thus, mainly interpretations of these statistics by the report's authors. Those on Guernsey who determine and manage local public policy or who are involved, as employers or workers, within Guernsey's economy may well have more detailed insights into local economic and business conditions which at least add nuance and depth to the strengths and weaknesses identified here and may, in some case, challenge them.



<b>Strengths of Guernsey's economy and labour market.</b>	<b>Weaknesses of Guernsey's economy and labour market.</b>
A substantial core of established, mature businesses.	A relatively low rate of new business formation.
A substantial degree of connectivity with UK and global economies through headquarter/branch structures.	Vulnerability to off-island decision-taking.
Relatively little manufacturing – a sector which has had long-term vulnerability to closure and job reductions in Western industrial economies.	
A high rate of full-time rather than part-time jobs.	A larger minority of jobs on zero hours contracts than in the UK generally.
Substantially higher proportions of employers have recently increased employment than have decreased employment and business confidence for the future is high. There is a relatively high degree of job opportunity with high levels of recruitment and job vacancy.	A range of corresponding labour market stresses are observed: job retention difficulties and wage competition; high levels of hard-to-fill vacancies, skills shortages, and skills gaps, partly related to worker movement between jobs.
Possibly higher productivity as greater output is generated by constrained staff members.	Other, negative, impacts on employers – turning away business, less innovation, reduction in customer service standards.
High proportions of employers have 'modern' training infrastructures and high proportions train, possibly under stimulus from constants on staff and skills availability.	Limitations on skills supply stemming from lack of work-readiness of young labour market entrants and Guernsey's housing licence requirements.
Use of a variety of training sources to meet Guernsey's training needs including those off-island and on-line.	Training provision <i>may</i> not be as responsive to employer needs as possible.
	Minority employer dissatisfaction with the range of training available on Guernsey but difficulty in reducing this dissatisfaction because of its variety and its specificity to the needs of individual or small numbers of employers.

## 2 Background

The 2014 Guernsey Employer Skills Survey was commissioned in June 2014 by the States of Guernsey of Commerce and Employment Department and Skills Guernsey.

The main aims of the survey were:

- To establish the composition of Guernsey's current workforce and the skills attributes of that workforce;
- To ascertain current and potential skills gaps in different sectors of the Guernsey economy;
- To describe current conditions in the island's economy and, more specifically, in Guernsey's labour market.

Of these aims, the main one is the second, the identification of skill shortages and gaps. Addressing skills gaps should increase productivity and competitiveness across the Guernsey economy and ultimately result in raising the overall economic output of the Islands. It should also assist in reducing reliance on imported labour by ensuring that skills are available locally.

### 2.1 Method

Telephone interviews, with an average interview length of about 25 minutes, were conducted with 318 employers in Guernsey in July and August 2014. Respondents included directors, proprietors, or other senior managers with detailed knowledge of the areas investigated by the survey as they relate to their own organisations.

The survey included both private and public sector organisations. Data reported is related to the establishment at which the respondent was based. Depending on the outcome of the survey's random sampling processes), this could be a headquarters (provided that the HQ was in Guernsey) or a branch.

A quota sample was designed, based on UK Standard Industry Classification (UK SIC 2007) codes and establishment size at the site at which the interview took place using the following size bands: 2-10; 11-25; 26-50 and 51+ employees. UK industry sector classifications were converted to Guernsey industry classification codes for the purpose of analysis.

Sample quotas reflecting the distribution of Guernsey employers by UK SIC 2007 sectors and size band were set. These distributions were derived from the sampling frame of the employer population in Guernsey (c 2,000<sup>5</sup>) which was generated from a blend of contacts supplied either by Experian (a major supplier of commercial data) or directly by the States of Guernsey of Commerce and Employment Department and Skills Guernsey.

However, by request of the States of Guernsey, contacts within the public administration sector were surveyed differently from those in other sectors. Contact details for 11 government departments were provided alongside workforce data

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<sup>5</sup> Source: Guernsey Quarterly Labour Market Bulletin March 2014

(numbers of employees in, and occupational breakdowns of, the workforces of the departments). All 11 contacts were interviewed. As a proportion of employers across Guernsey, these contacts accounted for just 3% of the overall sample, but they accounted for 44% of businesses with 51+ employees at the sites where respondents were interviewed.

The achieved sample was weighted for analysis purposes in two ways. Firstly, it was weighted by the true sector and size distributions of all employing establishments in Guernsey's economy as reported in the Guernsey Quarterly Labour Market Bulletin of March 2014. This ensures that the profile of the sample as reported reflects the profile of the employer population and that findings are as representative of the whole Guernsey economy as possible.

The structure of the unweighted employer sample achieved by the survey and its profile following weighting by sector and size are shown in Table 2.1:

**Table 2.1: Sample profile: Employing establishments** \*denotes less than 0.5%

	Achieved interviews no.	Unweighted sample %	Weighted no.	Weighted/sample %
<b>Administrative and support service activities</b>	13	4	18	6
<b>Agriculture, Horticulture, Fishing and Quarrying</b>	2	1	6	2
<b>Arts, entertainment and recreation</b>	13	4	8	3
<b>Construction</b>	19	6	48	15
<b>Education</b>	11	4	3	1
<b>Electricity, gas, steam and air conditioning supply/water supply, sewerage, waste management and remediation activities</b>	1	*	3	1
<b>Finance</b>	46	15	55	17
<b>Hostelry</b>	33	10	30	10
<b>Human health, social and charitable work activities</b>	20	6	21	6
<b>Information and communication</b>	15	5	8	3
<b>Manufacturing</b>	14	4	10	3
<b>Other service activities</b>	14	4	15	5
<b>Professional, business, scientific and technical activities</b>	34	11	21	7
<b>Public administration</b>	14	4	2	1
<b>Real estate activities</b>	7	2	6	2
<b>Transport and storage</b>	8	3	12	4
<b>Wholesale, retail and repairs</b>	54	17	51	16

	Achieved interviews no.	Unweighted sample %	Weighted no.	Weighted/ sample %
<b>2-10 employees</b>	193	61	223	70
<b>11-25 employees</b>	66	21	56	18
<b>26-50 employees</b>	34	11	25	8
<b>51+ employees</b>	25	8	14	5
<b>Total</b>	<b>318</b>	<b>100</b>	<b>318</b>	<b>100</b>

Secondly, the data was weighted by Guernsey's employment distribution. Weighting data by the employment distribution within an economy results in more accurate statistics when examining survey data that concern characteristics of the workforce, such as the occupational breakdown, as well as where the scale of skill shortages and skill gaps within the workforce are reported. The process of weighting the survey data to accurately reflect the employment profile across Guernsey was subject to limitations resulting from the employment population data available. There were two challenges faced. These were as follows:

As in the 'establishments' case above, data from the Guernsey Quarterly Labour Market Bulletin March 2014 was used as the main source of employment weighting. However, the distribution of employment in the economy is known only by the sectors in which employers operate and this is not broken out to give the distribution across size bands. As a result, employment weighting is by sector only and we have not been able to take into account the impact of different size profiles within each sector. While employment-related estimates are likely to be broadly accurate they may have lesser precision than those based on employing establishments as a result.

Eleven government departments were interviewed at the request of the States of Guernsey. This amounted to a virtual census of employers and, therefore, employees, within the public administration industry sector. As a proportion of all employment accounted for by employers in the survey, these eleven government departments accounted for 52%. As a consequence, analysis that involved the employment data, rather than the employer data, would have been overwhelmingly dominated by the employment characteristics of the public administration sector had we not, to avoid this, analysed the employment data based on the public administration sector separately from the employment data for all other sectors. Employment data for the public administration sector has not been weighted as it is already representative of the population in that sector.

The structure of the unweighted sample as represented by number of employees amongst employers in the survey and its' profile following weighting by sector are shown in Table 2.2:

Table 2.2: Sample profile: Employment

\*denotes less than 0.5%

	Achieved interviews no.	Unweighted sample % of employees	Weighted/ sample % of employees
Administrative and support service activities	13	2	5
Agriculture, Horticulture, Fishing and Quarrying	2	*	1
Arts, entertainment and recreation	13	2	1
Construction	19	4	11
Education	11	6	2
Electricity, gas, steam and air conditioning supply/water supply, sewerage, waste management and remediation activities	1	*	2
Finance	46	24	29
Hostelry	33	11	8
Human health, social and charitable work activities	20	11	7
Information and communication	15	5	4
Manufacturing	14	3	2
Other service activities	14	2	1
Professional, business, scientific and technical activities	34	8	7
Real estate activities	7	1	1
Transport and storage	8	4	4
Wholesale, retail and repairs	54	18	16
Public administration	14	52#	-
2-5 employees~	113	22	56
6-25 employees~	146	23	31
26-50 employees~	34	25	7
51+ employees~	25	30	6
<b>Total</b>	<b>318</b>	<b>100</b>	<b>100</b>

# = % of all employees across the unweighted sample

~ = these figures do not include the public administration sector

Generally, results from the total sample may be presumed accurate (with a 95% confidence level) within a maximum sample error of +/-5.5%. The margin of error on sub-sets of the total sample is larger, depending on the un-weighted number of respondents.

Throughout this report, significant differences between sub-samples and the total minus the sub-sample tested are highlighted. This provides an indication as to whether the statistic for the sub-sample is significantly greater or lesser than the statistic for the remainder of the sample.

### 2.1.1 Note on reporting

The report references differences by business size and industry sector for most questions where they are significant and noteworthy and significantly higher than average statistics are presented in bold font in charts and tables.

Statistically significant differences according to other variables are also discussed on occasion. These statistically significant differences are calculated at a 95% confidence level based on the percentages reported and the unweighted sample bases on which the percentage is based.

Results have been presented rounded to no decimal places – this may mean that some totals exceed 100%.

Reporting of public sector data has taken several forms as follows:

- In some cases, statistics refer to a '**public sector**'. This designation derives from a question which asked all respondents whether their establishment was in the public, private, or charity/voluntary sectors.
- In some cases, statistics refer to an '**education, health, and public administration**' sector. This was constructed as a combined sector because of the relatively small number of cases in each of these three sectors separately. This grouping has some overlap with a 'public sector' as above but also includes some private businesses in health and education. This grouping has been used when reporting employer-related statistics.
- In cases where employment-related statistics are concerned, the '**public administration**' sector and '**education and health**' sectors are separated. In these cases, 'public administration' refers to the eleven departments of Guernsey's government whilst 'education and health' relates to a mix of public and private establishments in these sectors.

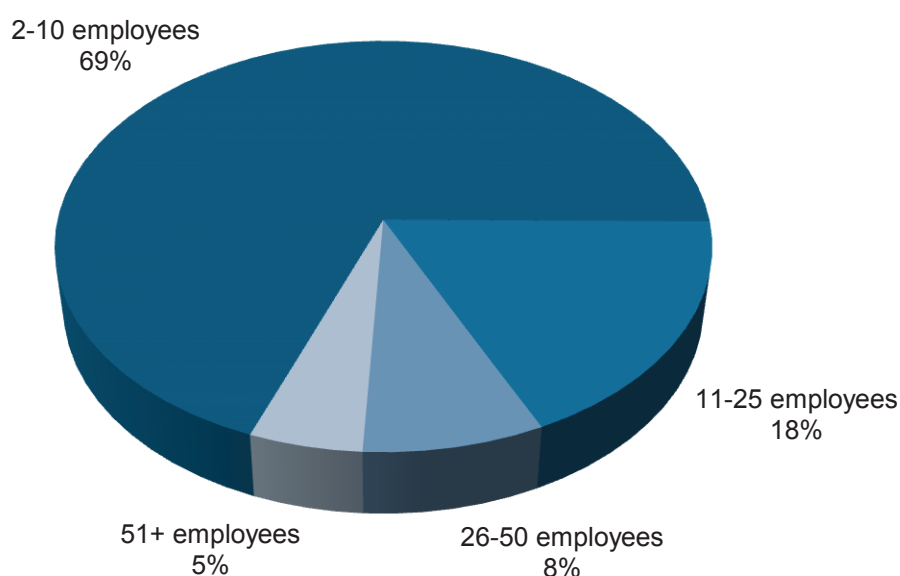
The data is compared to national surveys, including the Employer Skills Survey (ESS) 2013 and the Small Business Survey (SBS) 2012, where a comparison is possible or appropriate.

## 3 Employer Profile

### 3.1 Number of employees

The majority of Guernsey employers (70%) are micro-businesses, employing between 2 and 10 employees (including any working proprietors or partners). Small businesses (between 11 and 50 employees) account for a further quarter of the employer population (26%), while medium to large businesses (51+ employees) account for one in twenty of the employer population (5%). It is, however, important to note that in terms of employment, medium to large businesses (excluding government departments) are significant to the economy of the island, employing a third of the workforce (36%).

**Figure 3.1: Guernsey employer population by size (all employers)**



Unweighted sample base = 318

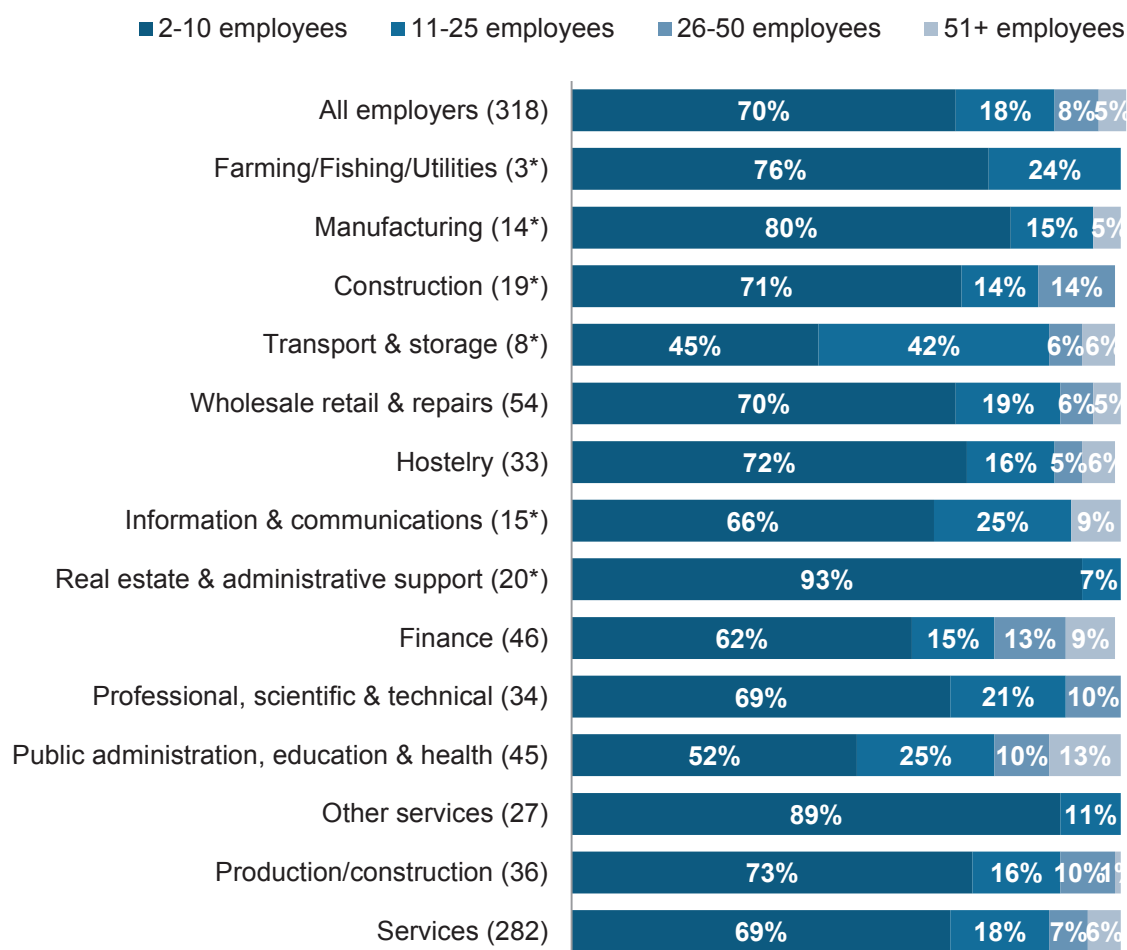
QA1. Including you and any working proprietors, how many people are on the payroll at this establishment?

The highest concentration of medium to large employers is to be found in the public administration, education, and health sectors (13% employing 51+ employees), with a further 35% of employers in this sector being small employers (11-50 employees).

A lower than average proportion (45%) of transport & storage businesses are micro-businesses (2-10 employees). Micro-businesses particularly predominate within the real estate & administrative support (93%) and other services (89%) sectors

A high proportion (87%) of charity/voluntary organisations are micros, compared to 71% of private sector and 42% of public sector organisations. (See following figure.)

**Figure 3.2: Business size by sector (all employers)**



Unweighted sample bases in parentheses \* caution: low sample base

QA1. Including you and any working proprietors, how many people are on the payroll at this establishment?

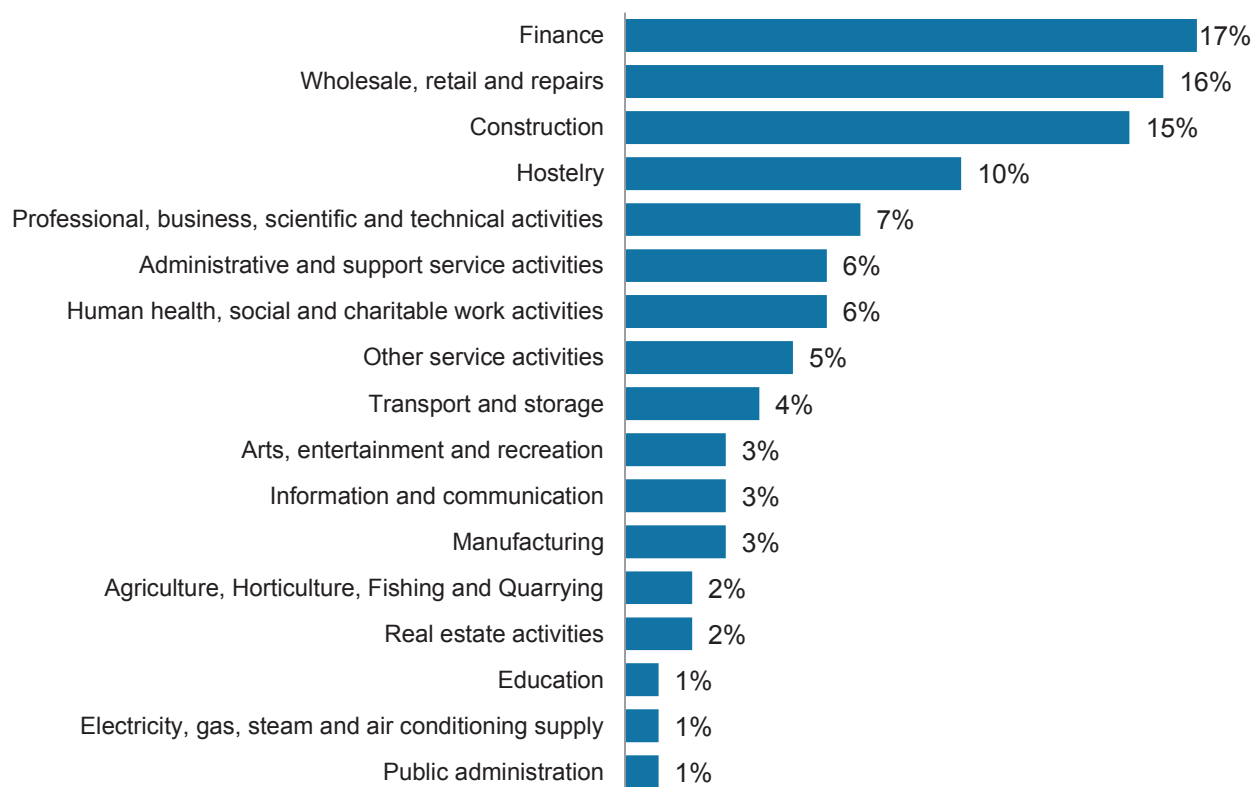
### 3.2 Sectors

At the broadest level, the majority of establishments operate in the private sector (91%), with the remaining minorities being in the public sector (5%) and the charity or voluntary sector (4%).

At a more detailed level, the three most significant industry sectors in Guernsey in terms of numbers of establishments comprise finance (17% of all establishments), wholesale & retail (16%) and construction (15%). A further one in ten employers (10%) operates within hostelry.



Figure 3.3: Guernsey industry profile (all employers)



Unweighted sample base = 318

QA3. What is the main business activity at this establishment?

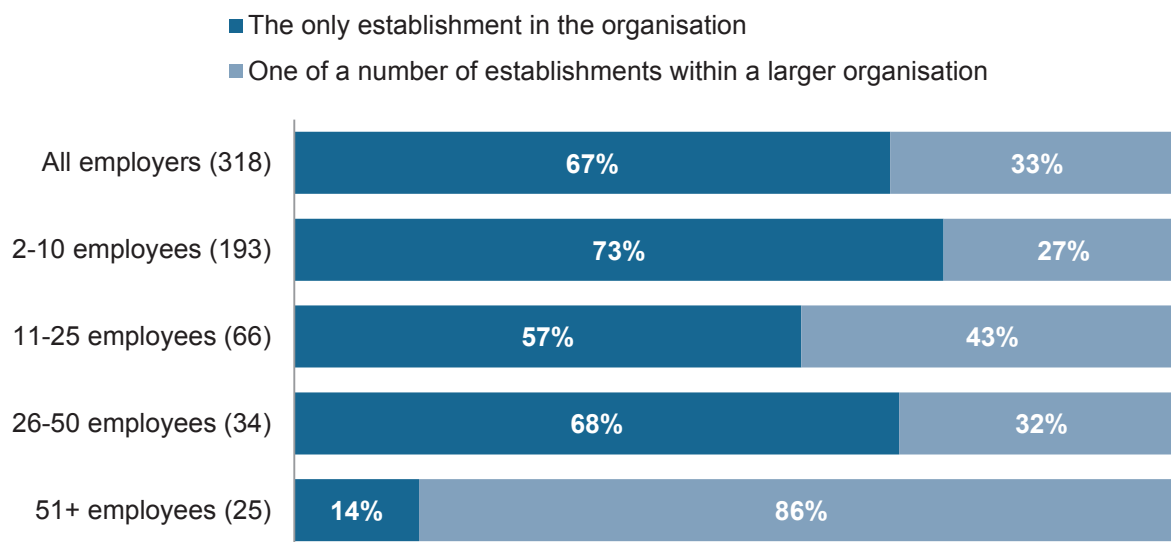
### 3.3 Number of sites

Two-thirds of employers (67%) operate from just one site. This proportion is higher than average amongst micro-businesses (73%), declining to just 14% of medium and large businesses.

A third of establishments (33%) are therefore part of multi-site organisations. This proportion increases to 69% of public sector establishments.

Construction accounts for one in five *single site* organisations (21%), while more than a quarter of *multi-site* organisations (28%) are within the finance sector (bank and insurance branches, for example).

**Figure 3.4: No. of sites, by business size (all employers)**



Unweighted sample bases in parentheses

QA4. Is this establishment ... ?

Around half (48%) of multi-site organisations (which, as above, constitute 33% of all organisations) have other sites based on Guernsey. A similar proportion (47%) has other sites outside of the UK. Two-thirds (65%) have sites elsewhere in the UK.

A third of multi-site organisations (34%) report the site at which they are based as being their head office. This proportion is higher than average (55%) in the finance sector.

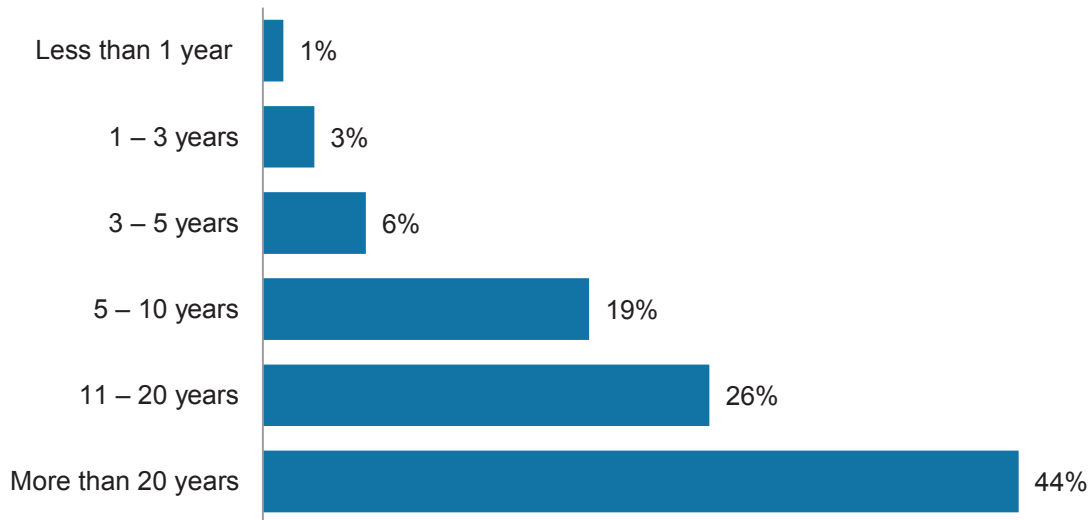
### 3.4 Age of the business

The majority of businesses have been trading in Guernsey for at least 10 years (70%), with more than two in five of businesses (44%) having traded on the Island for more than 20 years.

One in ten employers (10%) has traded in Guernsey for no more than 5 years, with the majority of these (6%) having traded for between 3 and 5 years.

The longer-established businesses are in the transport & storage sector (89% trading for more than 20 years in Guernsey) while more than half of wholesale, retail & repair businesses (54%) have traded for more than 20 years in Guernsey.

Two-thirds of businesses with 26 or more employees (69%) have traded in Guernsey for more than 20 years. More than a quarter of businesses with fewer than 26 employees (28%) have been trading in Guernsey for between 11 and 20 years. There is little variation by business size in terms of their likelihood of being newly established in Guernsey. This suggests that businesses that are new to Guernsey are both start-ups and relocations.

**Figure 3.5: Number of years trading in Guernsey (all employers)**

Unweighted sample base = 318

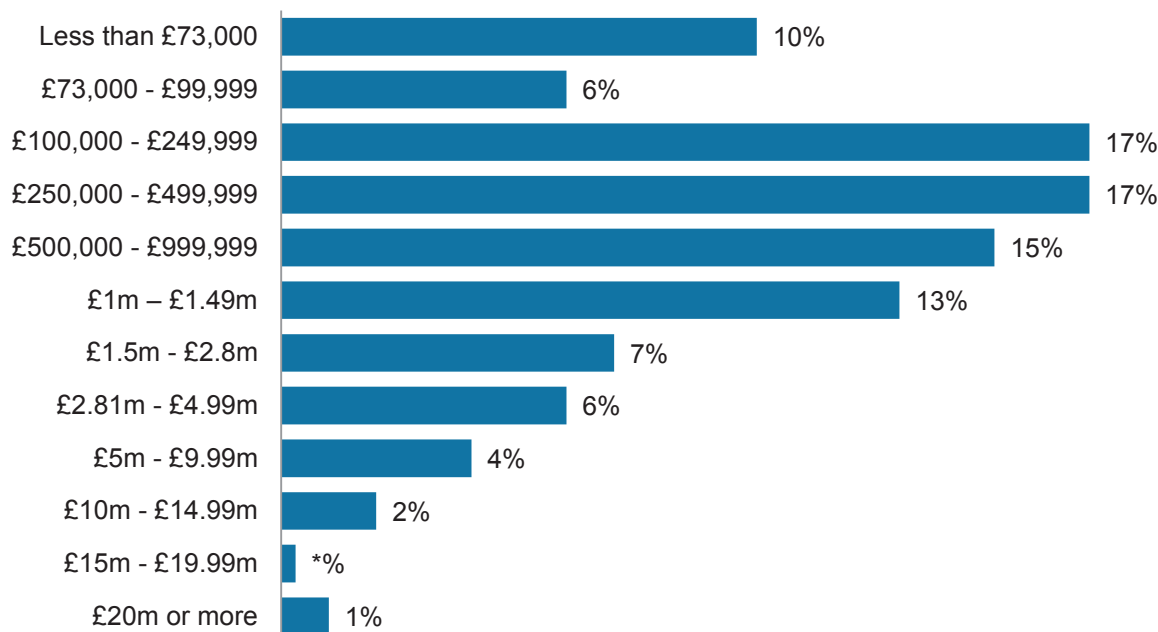
QA9. For how long has the business been trading in Guernsey?

### 3.5 Turnover

Three-quarters of employers (74%) provided an estimate of their turnover in the past 12 months.

One in ten (10%) estimated their turnover at below £73,000. A third of employers (33%) providing an estimate put their turnover at up to £250,000. A similar proportion (36%) estimated their turnover at £1 million or more.

**Figure 3.6: Turnover in the last 12 months (all employers – where provided a response)**



Unweighted sample base = 239      \*denotes less than 0.5%

QE1. Can you please tell me the approximate turnover of your business in the past 12 months at that site?

### 3.6 Breakdown of the workforce by occupation

While the employment of managers, directors and senior officials is fairly ubiquitous (97% of employers have staff in this group), this occupational group accounts for just 24% of all employees within the mainly private sector<sup>6</sup> workforce in Guernsey.

Around half of employers employ administrative and secretarial staff (52%), and these staff account for the next highest proportion of the workforce (23%).

The following table presents the proportion of employers with staff in each occupational group and the proportion of the workforce that are employed in each occupational group amongst employers in all sectors other than public administration and amongst those in public administration separately. It highlights the relative importance of professional occupations within the large public administration sector.

<sup>6</sup> The public administration sector is excluded from the analysis based on employment here because employees in this sector account for a very large proportion of the workforce. However, the public sector is still represented within the education and health sectors.

**Table 3.7: Proportion of employers that employ staff in different occupations and the proportion of the workforce employed in each occupation (all employers)**

	Employers employing staff in each occupation	Employees in each occupation - exc. public administration	Employees in each occupation – public administration
Managers, directors and senior officials	97%	24%	9%
Professional occupations	14%	14%	38%
Associate professional and technical occupations	11%	6%	11%
Administrative and secretarial occupations	52%	23%	15%
Skilled trades occupations	26%	6%	5%
Caring, leisure and other service occupations	7%	5%	10%
Sales and customer service occupations	25%	11%	1%
Process, plant and machine operatives	14%	5%	4%
Elementary administration and service occupations	21%	6%	8%
<i>Unweighted sample bases</i>	318	4463	4748

QB1/B2/B4

### 3.7 Nature of employment

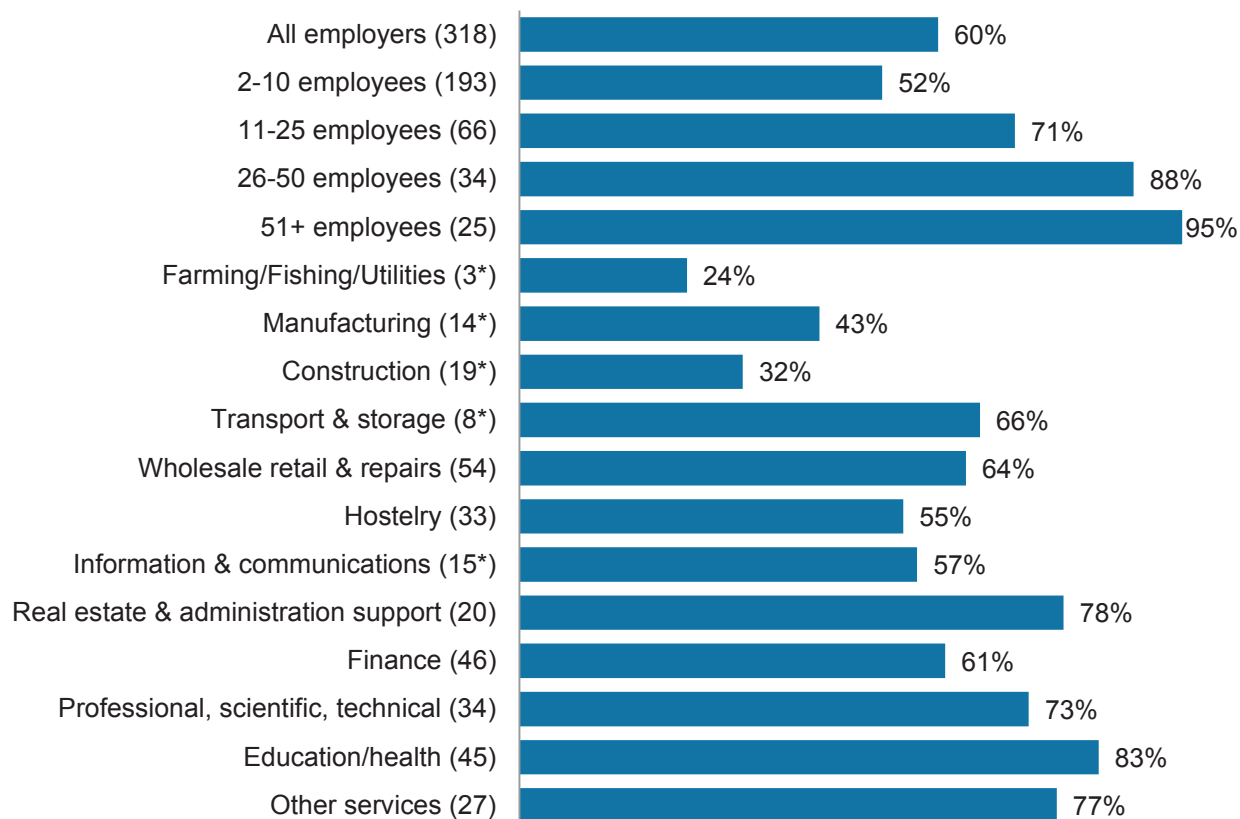
#### 3.7.1 Part-time working

Respondents were asked about the employment of staff on a part-time basis (i.e. working less than 30 hours per week) and on zero hours contracts<sup>7</sup>.

Three-fifths of employers (60%) employ staff on a part-time basis. This proportion increases with business size to 90% of businesses with 26 or more employees. The proportion of employers with part-time staff is significantly higher than average (83%) in education and health sectors.

<sup>7</sup> A zero-hour (or zero hours and sometimes zero contract hours) contract is a type of contract of employment in use in the United Kingdom and containing provisions which create an "on call" arrangement between employer and employee.

**Figure 3.8: Proportion of employers with part-time staff, by business size and sector (all employers)**



Unweighted sample bases in parentheses

\*caution: small sample base

QB5. Is any of your workforce at this establishment employed on a part time basis, working less than 30 hours per week?

Employers are most likely to employ part-time staff in administrative or secretarial occupations (27%). Around one in five employers (19%) employ part-time managers, directors, and senior officials while fewer (12%) employ part-time staff in sales and customer service occupations. Only around one twenty employers employ each of the remaining occupations on a part-time basis.

**Figure 3.9: Occupations in which part-time staff are employed (all employers)**

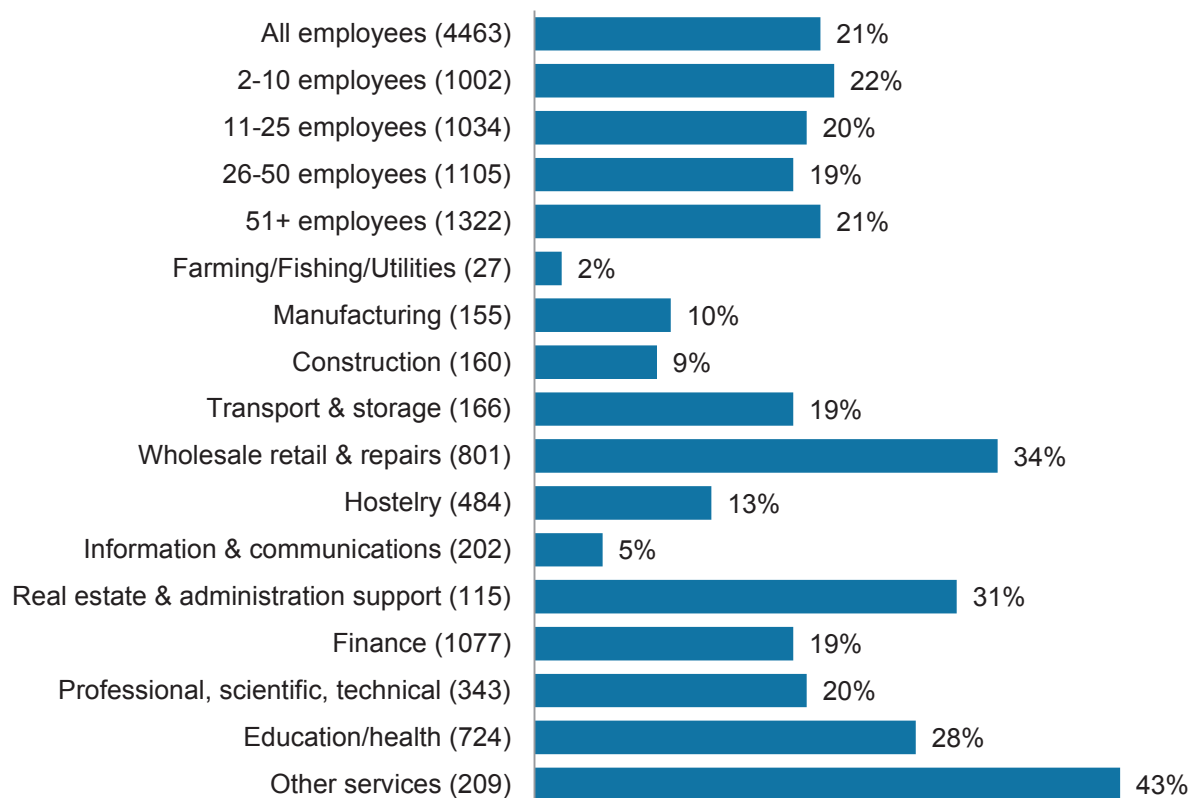
Unweighted sample base = 318

QB5. Is any of your workforce at this establishment employed on a part-time basis, working less than 30 hours per week?

The survey estimates that one in five employees in Guernsey (21%) works on a part-time basis. According to the Office for National Statistics (ONS) September 2014 Labour Market Statistics, 27% of all employment across the UK is on a part-time basis. This suggests that Guernsey has a lower incidence of part-time working than the UK average.

The proportion for Guernsey does not vary by business size, but is higher than average within public administration (27%) and charity/voluntary organisations (42%). More specific figures for other sectors are shown in the next figure. It can be seen that above-average proportions of part-time staff are located in 'other services' (43%), wholesale, retail & repair (34%), real estate & administrative support (31%) and education and health (28%):

**Figure 3.10: Proportion of the workforce that are employed part-time, by business size and sector (all employees)**



Unweighted sample base (all employees exc. public administration) = 4463

QB5. Is any of your workforce at this establishment employed on a part-time basis, working less than 30 hours per week?

As a proportion of all staff employed on a part-time basis, a third (34%) are employed in administrative and secretarial occupations, while the next highest proportion are to be found in sales and customer service occupations (23%). Just 11% of the part-time workforce is to be found in managerial occupations; while a slightly higher proportion (13%) are employed in professional occupations.



**Figure 3.11: Proportion of the part-time workforce that are employed in each occupational group (all employees)**



Unweighted sample base (all part-time employees exc. public administration) = 986

QB5. Is any of your workforce at this establishment employed on a part-time basis, working less than 30 hours per week?

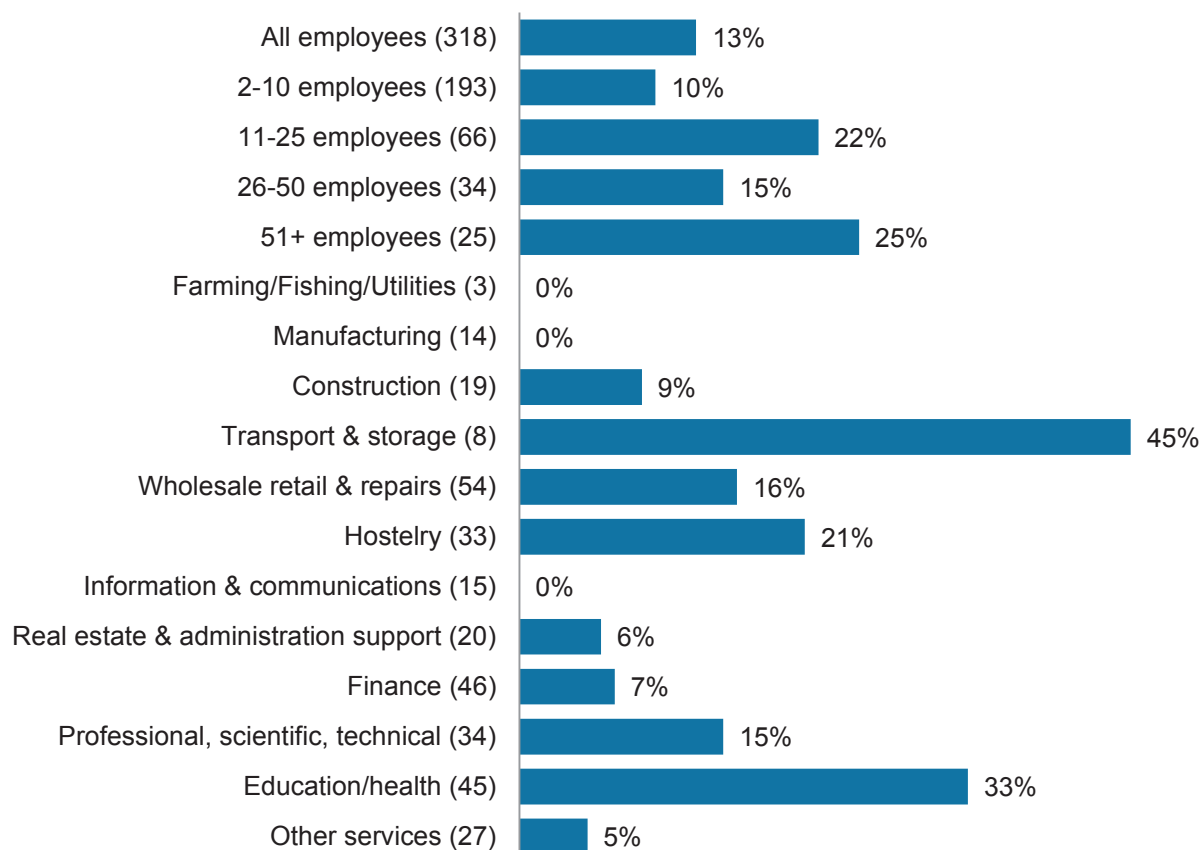
Within the public administration sector, 16% of the workforce is employed on a part-time basis. These part-time posts are most likely (31%) to be found amongst professional occupations (reflecting the concentration of employment in these occupations); caring, leisure and other service occupations (27%) and administrative and secretarial posts (20%). One in eight part-time workers (12%) is employed in elementary administration and service occupations.

### 3.7.2 Zero-hours contracts

One in eight employers (13%) employs staff on zero-hours contracts. This proportion is significantly higher than average within businesses with between 11 and 25 employees (22%) and those with more than 50 employees (25%). The proportion of employers using zero-hours contracts is significantly higher than average in education and health sectors (33%) and higher than average in the transport and storage sector (45%).

Zero-hours contracts are more likely to be used by organisations in the public sector than in the private sector or by charity/voluntary organisations (22%, 13% and 16% respectively).

**Figure 3.12: Proportion of employers using zero-hours contracts, by business size and sector (all employers)**



Unweighted sample bases in parentheses \*caution: small sample base

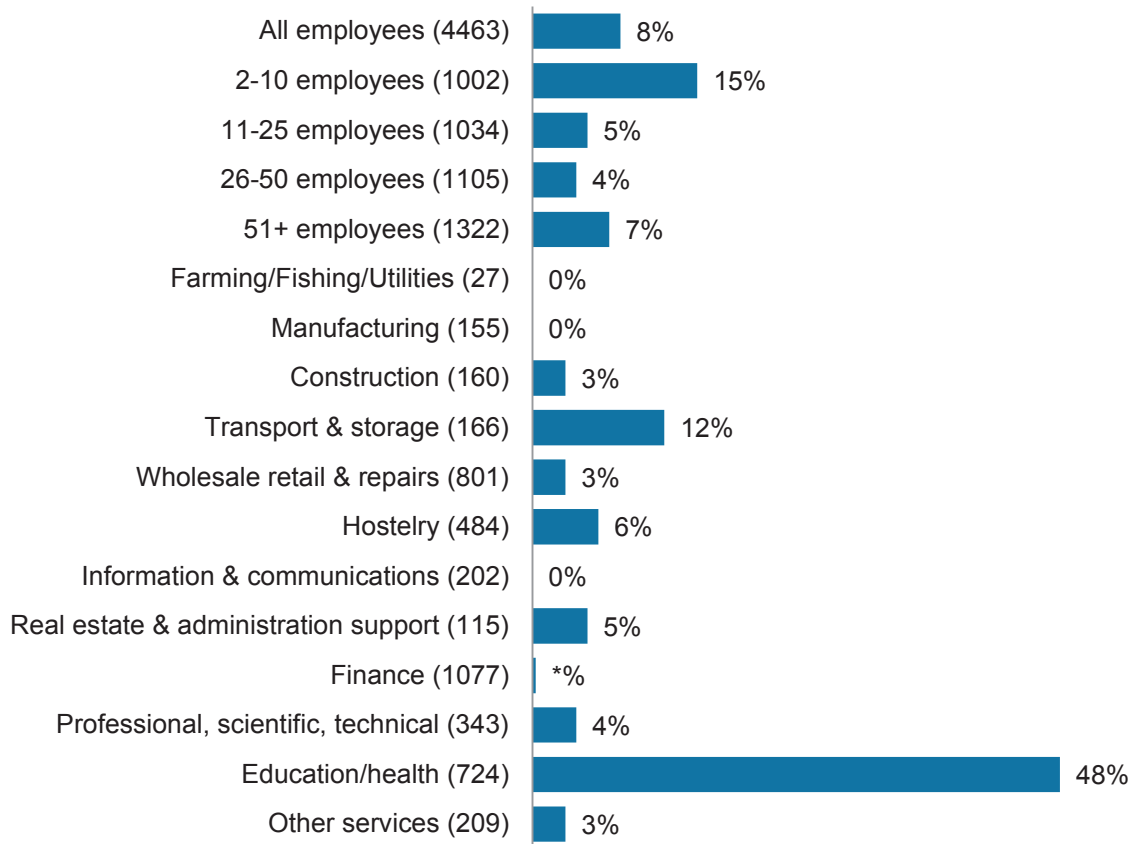
QB5. Is any of your workforce at this establishment employed on zero hours contracts?

The survey estimates that one in twelve employees in Guernsey (8%) works on a zero-hours contract. According to the Office for National Statistics (ONS) September 2014 Labour Market Statistics, 2% of all employment across the UK is on the basis of a zero-hours contract. This suggests that Guernsey has a higher incidence of employees on zero-hours contracts than the UK average.

The Guernsey proportion is significantly higher than average within micro-businesses (15% of businesses with between 2 and 10 employees) but is also significantly higher than average within public sector organisations (31%) and within the education and health sectors (48%).

While 9% of employees in service sectors in Guernsey are employed on zero-hours contracts, the proportion across production and construction sectors is just 2%.

**Figure 3.13: Proportion of the workforce that are employed on zero-hours contracts, by business size and sector (all employees)**



Unweighted sample base (all employees exc. public administration) = 4463      \*less than 0.5%

QB5. Is any of your workforce at this establishment employed on zero-hours contracts?

Within the public administration sector, 10% of the workforce is employed on a zero-hours contract.

## 4 Recruitment and Skill Shortages

### 4.1 Key findings

Over the last 2 to 3 years, 77% of Guernsey employers have recruited staff. More than half of all employers (56%) have had vacancies in the last 12 months.

A third of employers (34%) that have recruited staff in the last 2 to 3 years have taken on someone into their first job on leaving school, college or university. This equates to a quarter of all employers (26%).

This proportion increases with business size, with just 16% of all employers with between 2 and 10 employees recruiting someone into their first post-education job rising to 66% of employers with 26 or more employees.

Employers are most likely to have recruited 17 or 18 year olds into their first job from school (45% of those that have recruited education leavers) and least likely to have recruited 16 year olds just out of school (31%).

Sixteen year old school leavers are considered to be the most poorly prepared for work (52% very/poorly prepared), whilst university/HE leavers are considered to be the most well-prepared (96% very/well prepared).

While poor attitudes and low motivation are a particular issue for 16 to 18 year olds, a lack of the required skills or competencies is a more significant issue for university/HE leavers.

More than a quarter of employers that have recruited in the last 2 to 3 years (27%) have recruited staff requiring a housing licence. This increases to 56% in businesses with 26 or more employees.

The posts for which housing licences are most likely to have been required are managerial, skilled trades, and elementary administration and service occupations. Professional occupations also feature prominently. These occupational groups are, therefore, where demand for staff is least likely to be met from labour available on the island.

The most frequently cited reason for recruiting staff who require housing licences is that the skills required are not to be found locally (61% of that have recruited staff from off the island).

More than a quarter of all employers (28%) had vacancies at the time of the survey. This is a higher proportion than amongst employers interviewed in the UKCES Employer Skills Survey in 2013 (15%).

Nearly two-thirds of employers with current vacancies (64%) reported at least some of them a being hard-to-fill. As a proportion of all employers, this is 18%, which is considerably higher than the 2013 UKCES Employer Skills Survey figure of 5%.

Recruitment difficulties are particularly prevalent in the finance, education and health, and professional, scientific & technical sectors. They are most likely to have been for skilled intermediate level and higher order occupations, including skilled trades,

administrative and secretarial posts, associate professional and professional occupations.

A low number of applicants with the required skills is the predominant reason for recruitment difficulties, and the second and third most frequently cited reasons also concern a low number of applicants in general.

Overall, 14% of Guernsey employers have experienced recruitment difficulties due to skill shortages. This compares with the 4% of employers reported by the UKCES Employer Skills Survey 2013.

Technical, practical or job specific skills are most frequently cited as being difficult to obtain. These skills will vary widely by sector and even within sectors.

The main impact of recruitment difficulties is an increased workload for existing staff. Ninety per cent of employers with hard-to-fill vacancies cite this whilst around half are losing business or orders to competitors, delaying the development of new products or services, having to accommodate higher operating costs, or experiencing difficulties in introducing new working practices or in meeting customer service objectives.

Nearly a quarter of all employers (23%) report workforce growth in the last 12 months. One in eight employers (13%) reports a reduction in the size of their workforce.

There has been a significantly greater than average likelihood of a reduction in the size of the workforce in the public sector (32%).

Looking ahead to the next 12 months, a quarter of employers anticipate workforce growth (25%), with just 5% expecting a reduction in the size of the workforce.

Employers within the finance and professional, scientific & technical sectors are significantly more likely than average to anticipate workforce growth (40% and 43% respectively).

One in seven employers (14%) report difficulties in retaining staff. This proportion is particularly high in hospitality (25%), education and health and public administration (25%) and construction (28%).

Competition from other employers including the relatively high wages offered by other employers are amongst the main reasons for losing staff.

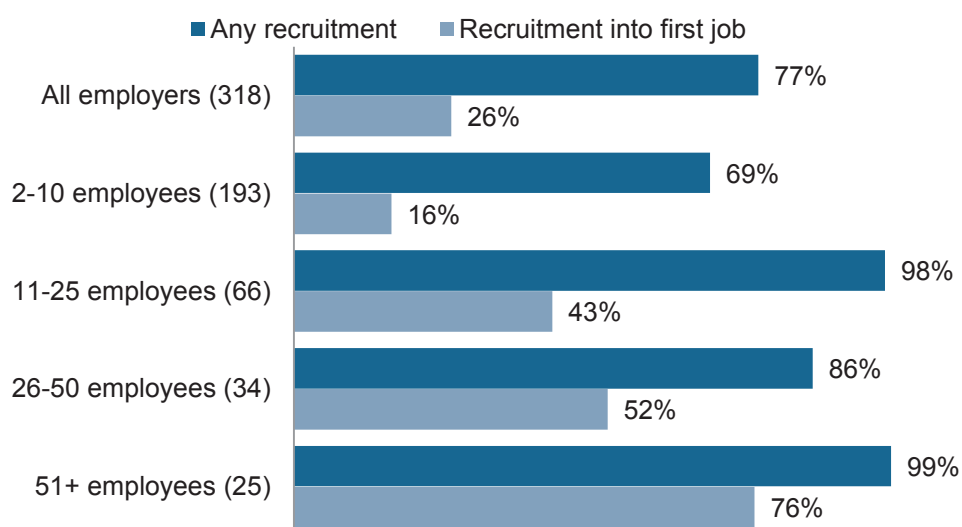
## 4.2 Recruitment activity

More than three-quarters of employers in Guernsey (77%) have recruited staff in the last 2 to 3 years. The proportion is high amongst micro-businesses (69% of those employing up to 10 staff) as well as in larger businesses (98% of businesses employing between 11 and 25 staff and 91% of those employing 26 or more staff).

A third (34%) of those having recruited staff in the last 2 to 3 years has taken on someone into their first job on leaving school, college or university. This equates to 26% of all employers. This is a similar proportion to that reported in the 2013 UKCES Employer Skills Survey (27%).

This proportion increases with business size, to two-thirds (66%) of all employers with 26 or more staff. The proportion recruiting staff into first jobs is higher than average in information and communication (59%) and professional, scientific and technical (56%) sectors.

**Figure 4.1: Proportion of employers that have recruited staff in the last 2 to 3 years and anyone into their first job on leaving school, college or university, by business size (all employers)**



Unweighted sample bases in parentheses

QB8. Has your organisation at that site recruited any staff in the last 2 to 3 years?

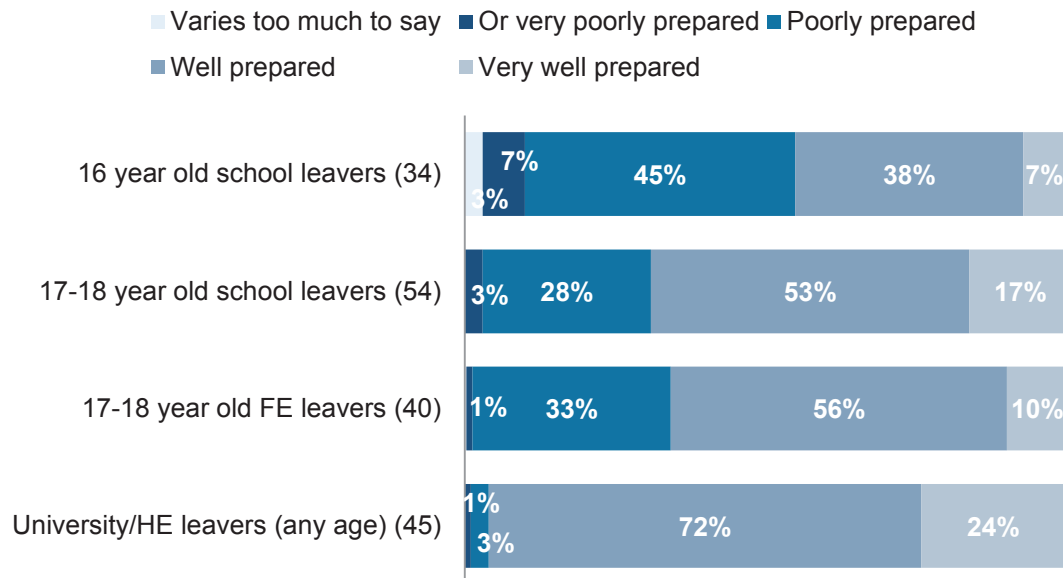
QB9. Of these recruits, were any taken on to their first job on leaving school, college or university?

Of the categories of education-leavers that may have been recruited, employers are least likely to have recruited 16 year olds just out of school (31% of those that have recruited someone into their first job) and are most likely to have recruited 17 or 18 year old school leavers (45%). Two-fifths (39%) have recruited university/HE leavers, while 17 or 18 year olds FE leavers have been recruited by a third of employers (35%).

Employers that have recruited people into their first job since school, college or university were asked how well-prepared the recruits had been for work.

16 year olds are considered the most poorly prepared (52% very/poorly prepared) while nearly all the employers that have taken university/HE leavers on (96%) consider them well prepared for work.

**Figure 4.2: Extent to which education leavers that have been recruited are considered well prepared for work (where recruited education leavers)**



Unweighted sample bases in parentheses

QB11. Thinking of those recruited in the last 2-3 years, how well prepared for work have the ....been?

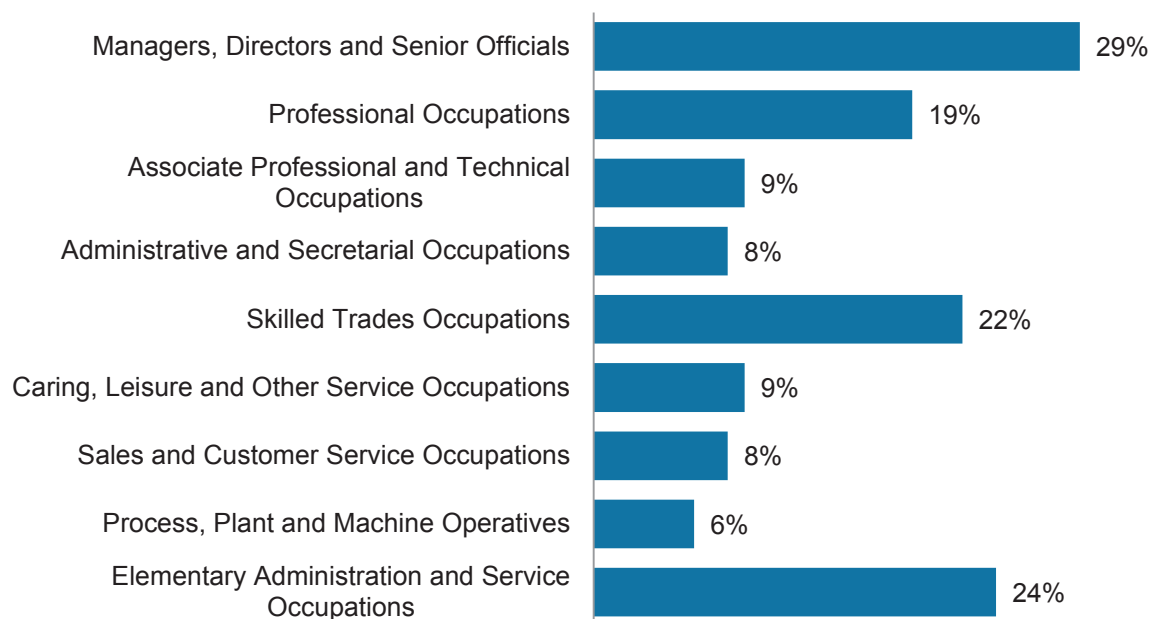
Amongst younger recruits, reasons for being poorly prepared for work revolve around employer perceptions of poor attitude, personality or lack of motivation (90% of those recruiting 16 year olds; 88% of those recruiting 17-18 year olds from school; 90% of those recruiting 17-18 year olds from FE colleges). Around three-fifths of 16-18 year olds are deemed to be lacking common sense, while two-thirds of 16-18 year old school leavers (65%) and around half of 17-18 year old college leavers (46%) are lacking required skills or competencies. A lack of the required skills or competencies is a more significant issue for university/HE leavers (62%).

#### 4.2.1 Housing licences

More than a quarter of employers (27%) who have recruited in the last 2 to 3 years have recruited staff requiring a housing licence i.e. they are moving people onto the island to work for them. This proportion increases steadily with business size to 56% of businesses with 26 or more staff. It is slightly higher than average within public sector organisations (37%), and significantly higher than average within multi-site businesses (39%).

In terms of the occupations for which housing licences have been required, managerial and senior positions are most frequently mentioned (29%), followed by elementary administration and service occupations (24%), skilled trades (22%), and professional occupations (19%).

**Figure 4.3: Type of posts for which staff required a housing licence (where recruited staff that required a housing licence in the last 2-3 years)**



Unweighted sample base = 75

QB14. In which occupations did staff require a housing licence?

When asked why they recruit staff requiring housing licences, the most frequently cited reason is that employers are unable to find people with the right skills locally (61%). This increases to 93% within the largest businesses (of 51+ employees).

More than a quarter (26%) cited an inability to find enough people locally regardless of whether or not they have the right skills (and not all posts require specific skills from the outset). This proportion is higher than average in the hostelry sector (63%).

### 4.3 Current vacancies and recruitment difficulties

#### 4.3.1 Current vacancies

More than a quarter of employers (28%) reported having current vacancies at the time of the survey. This compares with 15% of employers interviewed for the UKCES Employer Skills Survey 2013.

The Guernsey proportion increases with the size of the business, from 18% of businesses with between 2 and 10 employees to 45% of those with 11 to 25 employees, to 51% of those with 26 to 50 employees, and to 83% of those with more than 50 employees.

Just over a third of employers in the education, health and public administration (36%), construction (35%), and manufacturing (35%) sectors reported vacancies at the time of interviewing.

Overall, employers had an average of 2.4 vacancies at the time of the survey. This increased to 6.7 vacancies within businesses with more than 50 employees.



These vacancies were for posts that represented a range of broad occupational groups. Employers were most likely to report vacancies in administrative and secretarial occupations (22%) and least likely to report them for elementary administration and service occupations (7%). One in six employers each had vacancies for skilled trade occupations (18%) and associate professional and technical occupations (17%).

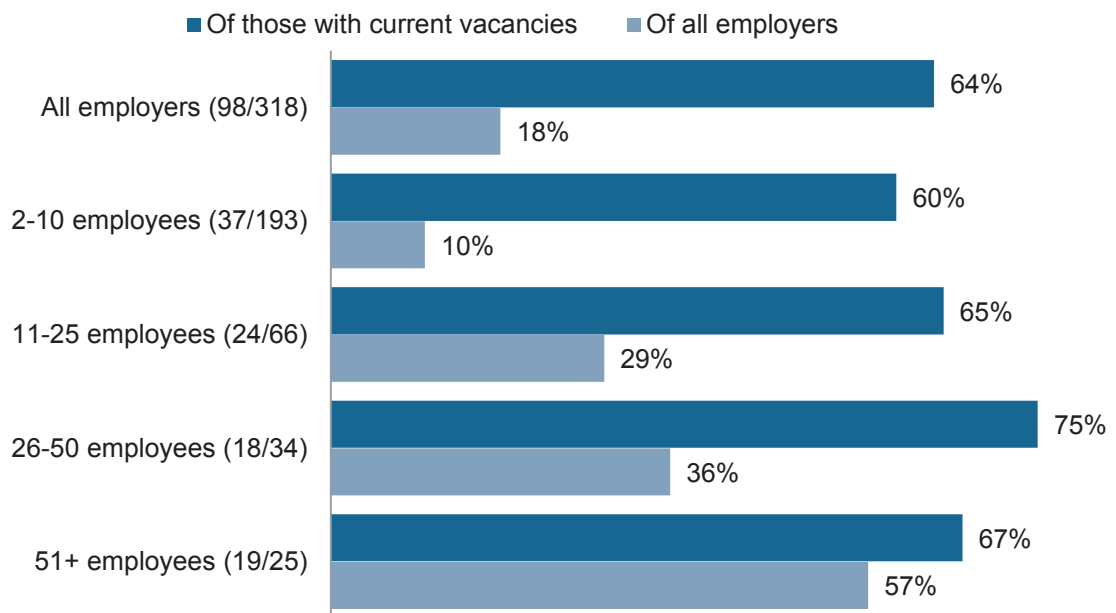
### 4.3.2 Hard-to-fill vacancies

Nearly two-thirds of employers who report current vacancies (64%) have vacancies that are hard-to-fill. This equates to 18% of all employers, which compares with 5% of employers reported hard-to-fill vacancies in the UKCES Employer Skills Survey 2013.

Thus, Guernsey employers are both more likely than their counterparts across the UK to have vacancies to fill and to be experiencing difficulties in filling them.

The proportion of employers *with current vacancies* experiencing recruitment difficulties is similar across businesses of all sizes. However, since larger businesses are more likely to have vacancies, re-calculation of the statistic on a base of *all* employers in each size band shows that the issue has a greater impact in larger businesses (see figure below).

**Figure 4.4: Proportion of employers that have hard-to-fill vacancies, by business size (where have current vacancies/all employers)**



Unweighted sample bases in parentheses (have current vacancies/all employers)

QB20. Are there any of these vacancies proving hard-to-fill?

The differences in the extent to which hard-to-fill vacancies are reported by sector are likely to reflect business size profiles by sector. However, this is likely to be only part of the picture. The incidence of recruitment difficulties is significantly higher than average in finance (100% of these employers with current vacancies), education and health (94%) and the professional, scientific & technical sector (74%).

In terms of the occupations in which recruitment difficulties are most likely to have been experienced, the most frequently mentioned are skilled trades and skilled administrative and secretarial posts (both 21%), closely followed by associate professional and technical (20%) and professional (18%) occupations.

**Figure 4.5: Occupations in which employers have experienced recruitment difficulties (where have hard-to-fill vacancies)**

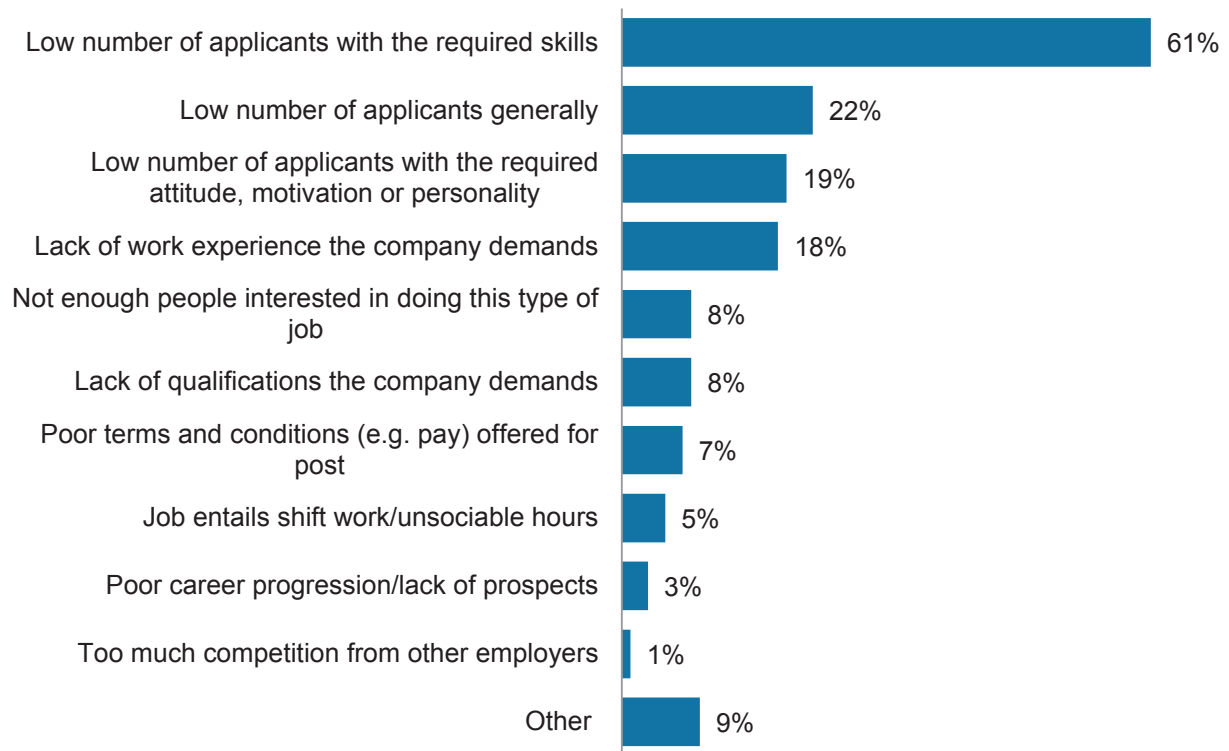


Unweighted sample base = 58

QB21. In which of these occupations do you have hard-to-fill vacancies?

Lack of skills predominates as a reason for vacancies being hard-to-fill (61%), while lack of applicants in general or with the right attitude/motivation/personality or with the required experience all feature relatively strongly as issues in trying unsuccessfully to fill vacancies (each cited by around one in five employers with hard-to-fill vacancies).

**Figure 4.6: Reasons for recruitment difficulties – unprompted, multiple response (where have hard-to-fill vacancies)**



Unweighted sample base = 58

QB22. What are the main reasons for these difficulties? These could be people, skills or job-related

### 4.3.3 Skill-shortage vacancies

Overall, 14% of all employers have experienced recruitment difficulties due to skill shortages (skill-shortage vacancies - SSVs). This compares with 4% of all employers reported by the UKCES Employer Skills Survey 2013.

This figure is derived from employers that spontaneously cite lack of the required skills, experience or qualifications amongst applicants and those that, when prompted, acknowledged these deficiencies as the cause of recruitment difficulties.

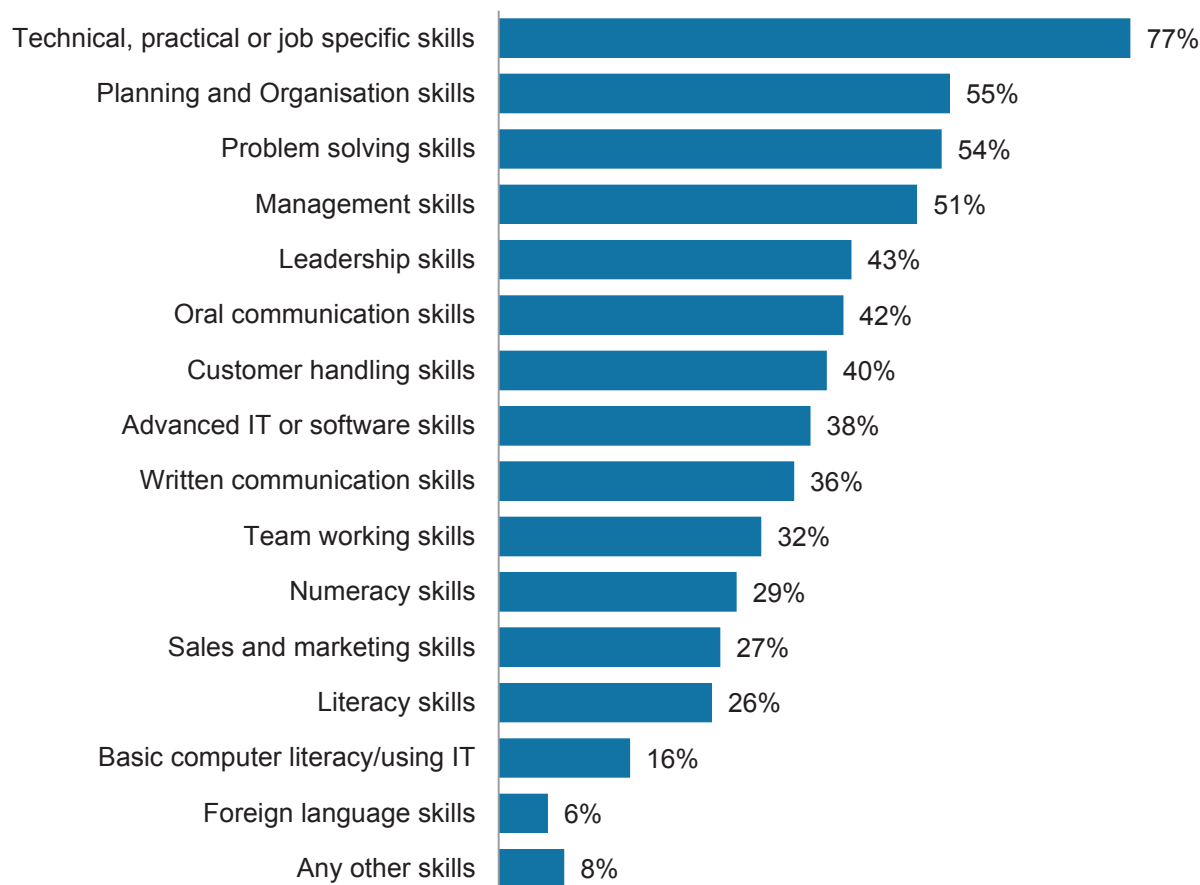
Of employers who did not spontaneously mention a lack of skills, experience or qualifications amongst applicants, nearly three-quarters (73%) reported too few or no applicants, while more than half (56%) reported applicants of insufficient quality. Thus, two-fifths (42%) reported both as issues when trying to recruit.

Overall, lack of skills amongst applicants is cited by 81% of all employers with hard-to-fill vacancies

Skills that have been difficult to obtain from applicants are summarised in the figure below:

The most frequently mentioned are technical, practical or job specific skills (77%), while more than half of employers with skill shortage vacancies cite shortage of planning and organisation (55%), problem solving (54%) and management (51%) skills.

**Figure 4.7: Skills that employers are finding difficult to obtain - prompted, multiple response (where have hard-to-fill vacancies due to lack of skills)**



Unweighted sample base = 45

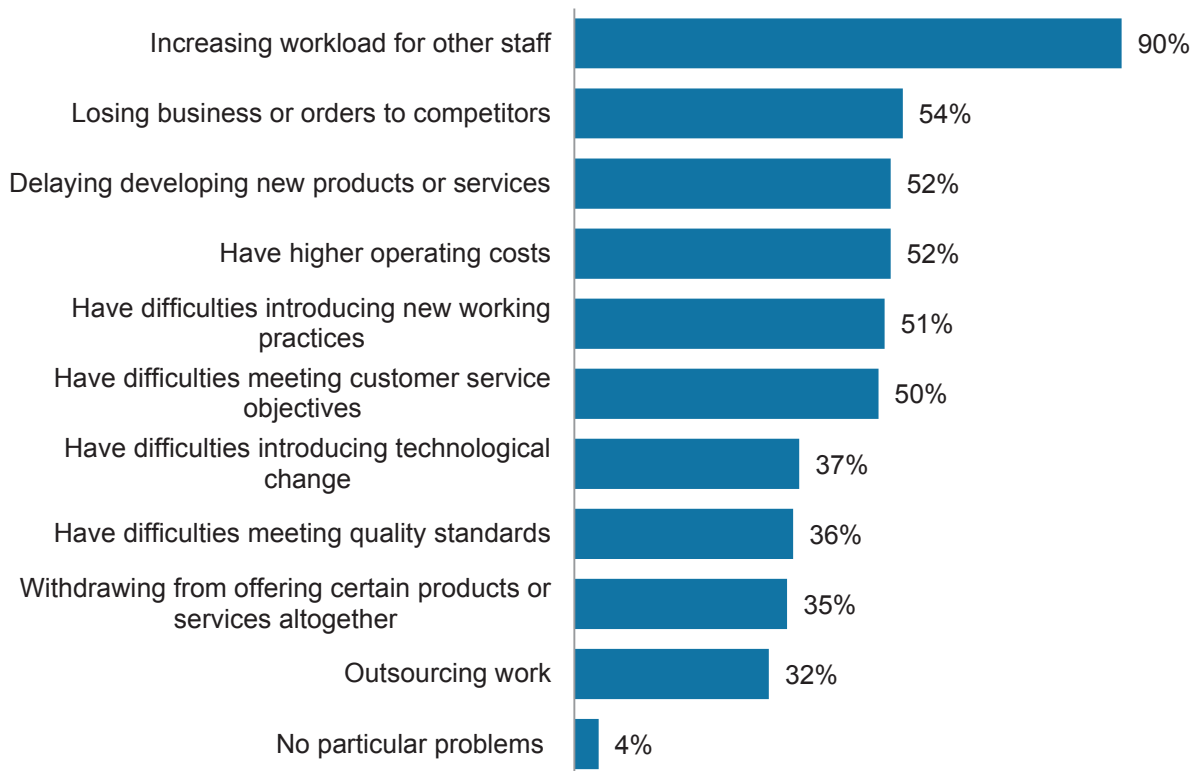
QB25. Have you found any of the following skills difficult to obtain from applicants?

#### 4.3.4 Impact of recruitment difficulties

Respondents were given a list of potential operating issues that might result from vacancies being hard-to-fill and asked if any were being experienced by the business.

Nearly all employers with hard-to-fill vacancies (90%) cited an increased workload for existing staff, while losing business or orders to competitors (54%), delays in developing new products or services (52%), having higher operating costs (52%), having difficulties introducing new working practices (51%) and experiencing difficulties meeting customer service objectives (50%) were each cited by around half of employers with hard-to-fill vacancies.

**Figure 4.8: Impact of having hard-to-fill vacancies - prompted, multiple response (where have hard-to-fill vacancies)**



Unweighted sample base = 58

QB26. Are hard-to-fill vacancies causing this establishment to...?

#### 4.4 Recent vacancies

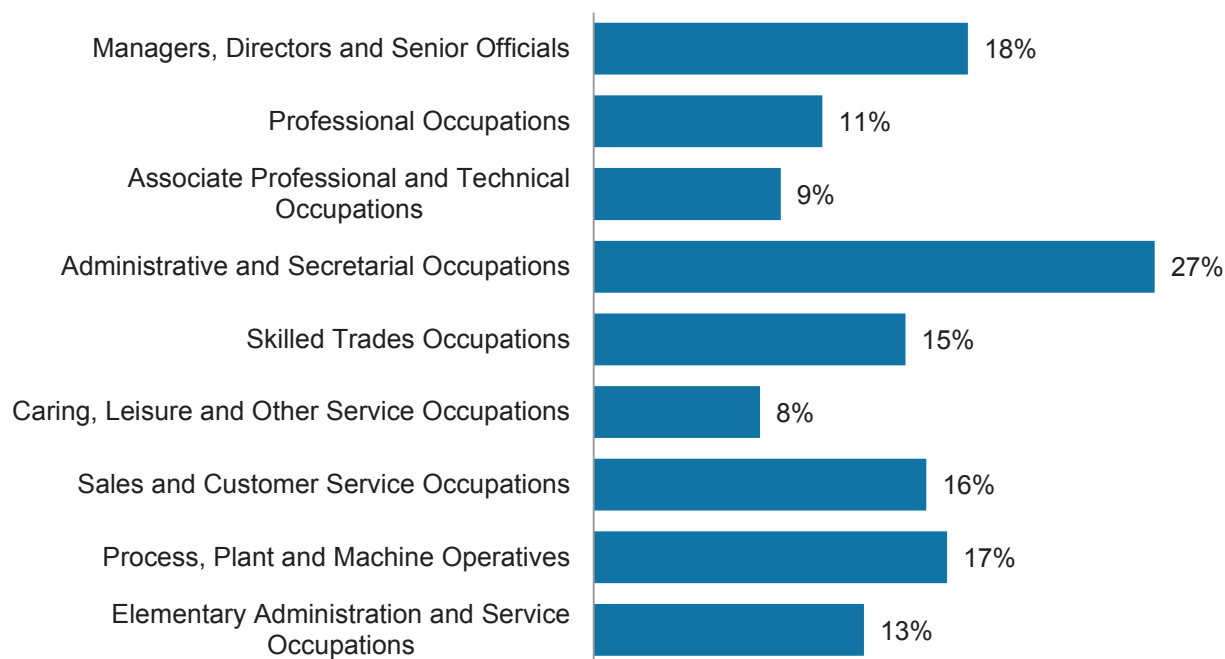
Respondents were also asked if their business had had any vacancies at the site during the last 12 months. They were asked to exclude current vacancies. Thus, all the vacancies discussed here are those that have been successful filled or withdrawn.

More than half of all employers (56%) have had any vacancies in the last 12 months. This proportion increases with business size from 43% of employers with between 2 and 10 employees to 79% of those with between 11 and 25 employees and to 96% of those with 26 or more employees.

The occupations in which employers have had vacancies are summarised in the next figure.

Employers are most likely to have had vacancies in administrative and secretarial occupations (27%), while around one in six have had vacancies for managers, directors, senior officials (18%), process, plant and machine operatives (17%), sales and customer service occupations (16%) and skilled trades occupations (15%).

**Figure 4.9: Occupations in which employers have had vacancies in the last 12 months (where have had vacancies)**



Unweighted sample base = 191

QB29. In which occupations did you have vacancies at that site?

#### 4.5 Workforce growth

For two-thirds of all employers in Guernsey (65%) the number of staff they employ remained the same over the last 12 months. For nearly a quarter of all employers (23%) there was some growth. This increases to more than two-fifths of employers with 26 or more staff.

For one in eight employers (13%) there was a reduction of the workforce. This increases to 26% of employers with more than 50 staff. This proportion is significantly higher than average within the public sector (32%), although it is also significantly higher than average within the wholesale, retail & repairs sector (20%) and within manufacturing (23% - but this is not statistically significant due to the small sample base).

There is a similar picture anticipated over the next 12 months. Again, two-thirds of employers (69%) expect their workforce to remain at the same size, while a quarter (25%) expects it to increase. Employers in the finance and professional, scientific & technical sectors are particularly likely to be optimistic, with two-fifths anticipating workforce growth in the next 12 months (40% and 43% respectively). Very few employers (5%) anticipate reducing the size of their workforce in the near future.

Once again, the proportion anticipating a reduction in the size of the workforce is higher amongst employers with more than 50 staff (31%) and in terms of both recent and anticipated workforce trends, the decline in staff employed may be larger in terms of the numbers of employees involved than the overall figure for proportions of establishments suggests.

**Table 4.10: Workforce growth and decline in the last 12 months and expected in the next 12 months, by business size and sector (all employers) \*caution: small sample base**

	<i>Unweighted sample bases</i>	In the last 12 months			In the next 12 months		
		Increased	Decreased	Remained the same	Increase	Decrease	Remain the same
Farming/fishing/ utilities	3*	24	0	76	31	0	69
Manufacturing	14*	38	23	40	55	18	27
Construction	19*	28	7	65	16	0	80
Transport & storage	8*	20	0	80	0	0	100
Wholesale, retail & repairs	54	17	<b>20</b>	63	18	6	<b>76</b>
Hostelry	33	20	13	67	19	10	70
Information & communication	15*	53	5	42	43	0	57
Real estate & administrative support	20*	7	27	66	19	17	64
Finance	46	30	19	51	<b>40</b>	6	54
Professional, scientific & technical	34	19	8	72	<b>43</b>	2	54
Education, health & public administration	45	23	6	71	25	3	72
Other service activities	27	14	0	86	16	0	84
<b>Business size</b>							
2-10 employees	193	17	10	<b>73</b>	22	5	<b>73</b>
11-25 employees	66	<b>32</b>	<b>22</b>	46	26	3	<b>71</b>
26-50 employees	34	<b>41</b>	8	52	<b>48</b>	0	52
51+ employees	25	45	26	29	36	31	31
<b>All employers</b>	<i>318</i>	23	13	65	25	5	69

QB31. Over the last 12 months has the number of staff employed at that site...?

QB32. And over the next 12 months do you expect the number of staff employed at that site to...?

### 4.6 Staff retention

One in seven employers (14%) reports experiencing difficulties in retaining staff. This proportion is significantly higher than average amongst those employing between 11 and 25 staff (25%) and in hostelry (25%), education, health, and public administration (25%) and within construction (28% - although this is not statistically significant). Public sector organisations are significantly more likely than average to experience difficulties retaining staff (31%).

Competition from other employers, including that staff have been offered more money to work elsewhere, features prominently as a reason for difficulty in retaining staff. One in four employers cite housing licence issues and one in five report that staff do not always want to stay for a long period. One in ten employers who have difficulties retaining staff acknowledges that a lack of training/personal development can be a factor. The main reasons for failing to retain staff are summarised in the chart below.

**Figure 4.11: Reasons for difficulties in retaining staff (where have difficulties)**



Unweighted sample base = 51 'Other' includes: The employees are not suitable; difficult to find houses; the cost of living in Guernsey; need specialist skills; employees go on sick leave.

QB34. What are the reasons for difficulties in retaining staff?



## 5 Skill Gaps and Skill Development

### 5.1 Key findings

Three in ten employers (29%) reports skill gaps amongst their existing workforce. This is a higher proportion than that reported by the UKCES Employer Skills Survey 2013 (15%). It suggests that Guernsey employers are more likely than the UK average to face the challenges of maintaining skill levels and of up-skilling their workforces.

The proportion of employers with skill gaps in their workforce increases to 82% of employers with more than 50 employees and it is significantly higher than average within the finance sector (43%).

Eight per cent of the workforce is reported as not being fully proficient in their job roles. This compares with 5% of the UK workforce, as reported in the UKCES Employer Skills Survey 2013.

A quarter of staff (across all but the public administration sector) that is not fully proficient is in administrative and secretarial occupations (25%). Professional occupations are next most likely to have the need for further skill development (16% of all skill-deficient staff).

Partially completed training and being new to the role are the main reasons for staff not being fully proficient in their jobs. However, more than two-fifths of employers with skill gaps in their current workforce cite being unable to recruit staff with the required skills as the reason.

Technical, practical or job specific skills are most frequently mentioned as the skills lacking in the existing workforce. This is particularly the focus of skill needs amongst employers in production and construction sectors.

As was the case for recruitment difficulties, skill gaps in the existing workforce are most likely to be putting pressure on other staff, increasing their workload.

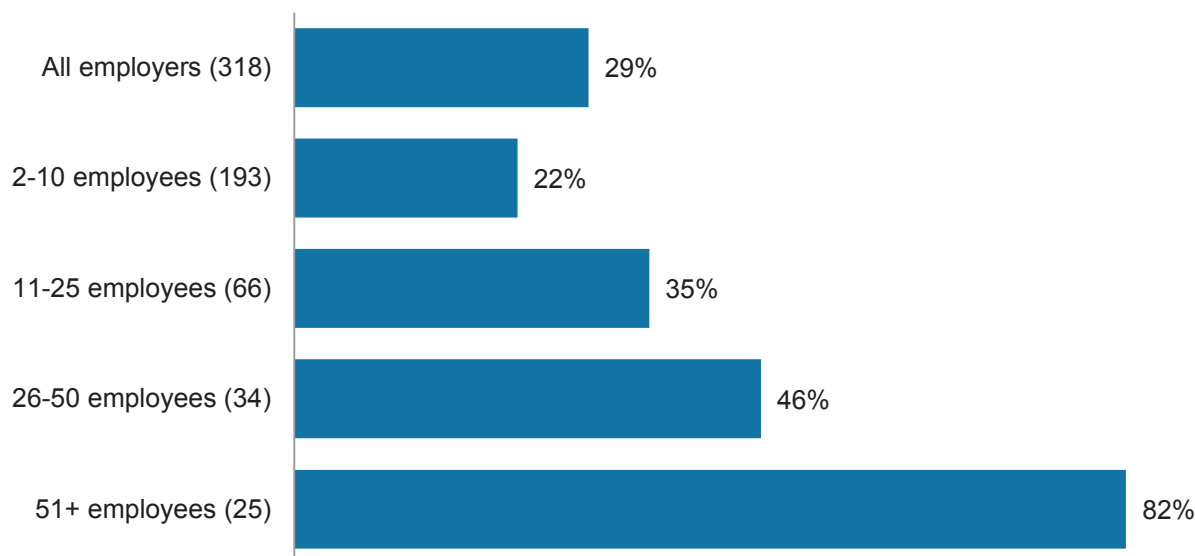
The majority of employers with skill gaps (89%) intend to address their staff's skill needs through training and development activity.

### 5.2 Skill Gaps

Three in ten employers (29%) highlight skill deficiencies among their workforce. This is a higher proportion than that reported by the UKCES Employer Skills Survey 2013 (15%).

The proportion increases with business size, reflecting the increasing probability of some staff needing further skill development where there are more of them.

**Figure 5.1: Proportion of employers identifying skill deficiencies in the workforce, by business size (all employers)**



Unweighted sample bases in parentheses

QC1. How many of your [n] existing staff working in [OCCUPATION] would you regard as fully proficient at their job?

By sector, the proportion of employers with skill deficiencies in their workforce is slightly (but not statistically significantly) higher than average within finance (43%).

The propensity to have skill gaps in existing workforces is higher than average within organisations that have recruited (35%), that have funded or arranged training in the last 12 months (36%) and amongst those that currently have hard-to-fill vacancies (54%) and staff retention difficulties (59%). The latter, those with recruitment and retention difficulties, are struggling on a number of fronts to develop and maintain workforce skills.

As a proportion of all employees, 8% of the workforce is reported as not being fully proficient. It is higher than the proportion reported by the UKCES Employer Skills Survey 2013 (5%).

The Guernsey proportion varies little by business size, although it is significantly higher than average in hostelry (17%) and information & communications (13%) sectors.

Of all staff<sup>8</sup> that are deemed to be deficient in terms of the skills they need to do their current job, a quarter (25%) are in administrative and secretarial occupations. Staff within professional occupations accounts for the next largest proportion of skills gaps (16%).

The occupational breakdown of the segment of the workforce that is considered as not fully proficient in their jobs is summarised in the figure below.

<sup>8</sup> The public administration sector is excluded here for methodological reasons (see technical annex for full details).

**Figure 5.2: Breakdown of the workforce\* that are not fully proficient, by occupation (employees that are not fully proficient)**



Unweighted sample base (employees not fully proficient exc. public administration) = 351

QC1. How many of your [n] existing staff working in [OCCUPATION] would you regard as fully proficient at their job?

The figure above looks at the proportion of all skills gaps which are in each occupation. However, the numbers of employees with skills gaps can also be looked at as proportions of people employed in each occupation. In this light, the highest proportion of skills gaps is found in caring, leisure and other service occupations (21% of all employees), while one in eight of those employed in skilled trades and elementary occupations (12% for each) are not fully proficient.

Within other occupational groups, the proportion that are not fully proficient ranges from 1% amongst process, plant and machine operatives, to 3% amongst managers, directors and senior officials, and to 7% or 8% within all other occupational groups.

Within the public administration sector, 6% of all employees are deemed to be lacking some of the skills they need. One in four employees who are not fully proficient in public administration work in professional occupations (25%) and a similar proportion (24%) work in associate professional and technical occupations. Between one in ten and one in seven work in administrative and secretarial occupations (14%), as process, plant and machine operatives (14%), or as managers, directors and senior officials (10%).

Respondents were asked about the main causes of skill gaps for up to two occupations in which they identified staff who were not fully proficient. Based on their aggregated responses, partially completed training and being new to the role are the most frequent causes of skill gaps. Being unable to obtain or retain staff with the right skills or motivation also feature strongly, while the impact of introducing new working practices, products and service and introducing new technology are mentioned by around a quarter of employers.

**Figure 5.3: Main causes of skills deficiencies – prompted, multiple response (where have skill gap)**



Unweighted sample base = 99

QC2. What are the main causes of some of your [UP TO 2 OCCUPATIONS RANDOMLY SELECTED] not being fully proficient in their jobs?

The main causes of skill gaps vary by occupation, as one would expect, but sample bases are low which makes it inadvisable to draw firm conclusions. However, the data is presented in the table that follows.

**Table 5.4: Main causes of skill gaps, by occupation (where have skill gaps)** caution: small sample bases

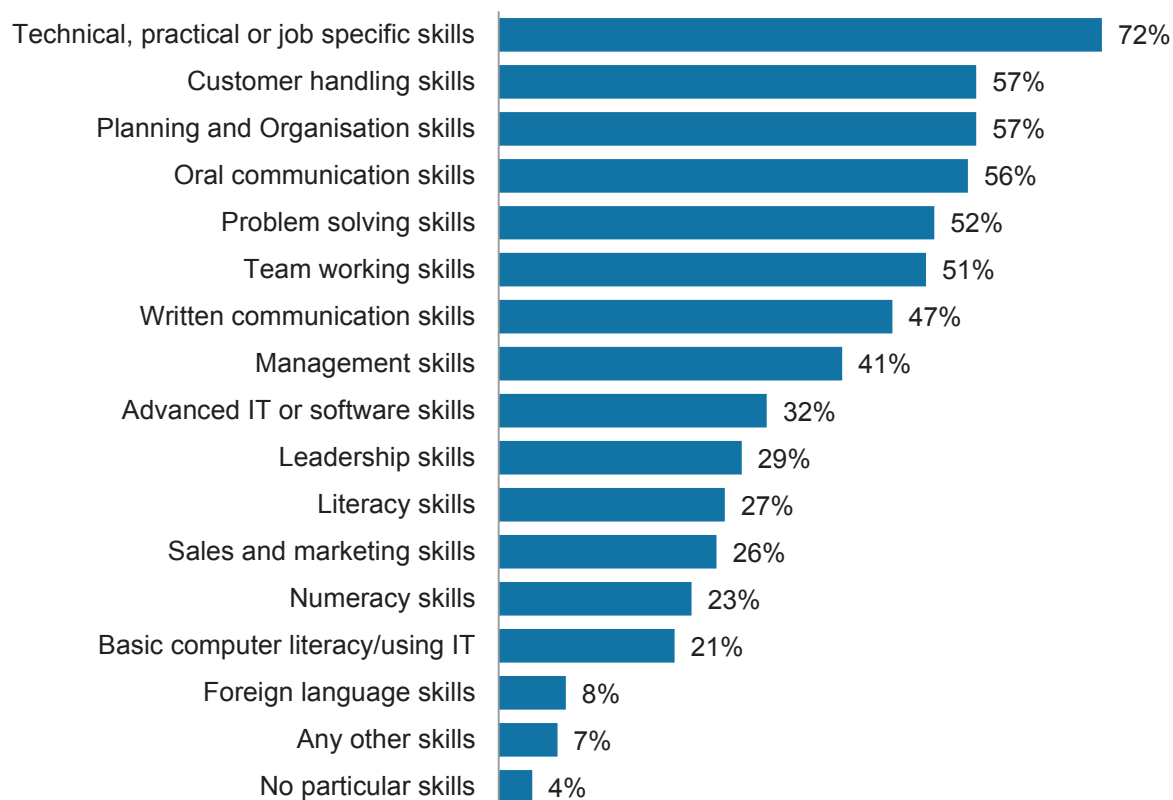
	Unweighted sample bases	The development of new products and services	The introduction of new working practices	The introduction of new technology	They are new to the role	They have not received the appropriate training	Their training is currently only partially completed	They have been on training but their performance has not improved sufficiently	Unable to recruit staff with the required skills	Problems retaining staff	Staff lack motivation	Are there any other reasons?
<b>Managers, directors and senior officials</b>	15	17%	37%	17%	54%	15%	48%	44%	64%	25%	28%	18%
<b>Professional occupations</b>	8	5%	6%	6%	94%	32%	83%	60%	63%	7%	45%	34%
<b>Associate professional and technical occupations</b>	6	9%	4%	14%	25%	14%	39%	26%	86%	12%	4%	19%
<b>Administrative and secretarial occupations</b>	30	27%	27%	10%	69%	25%	68%	21%	35%	3%	30%	4%
<b>Skilled trades occupations</b>	12	11%	1%	11%	53%	38%	99%	34%	34%	30%	34%	29%
<b>Caring, leisure and other service occupations</b>	5	9%	46%	21%	70%	16%	70%	49%	66%	30%	30%	9%
<b>Sales and customer Service occupations</b>	24	35%	28%	44%	70%	23%	66%	38%	43%	32%	34%	6%
<b>Process, plant and machine operatives</b>	2	0%	8%	0%	8%	8%	8%	100%	8%	8%	100%	0%
<b>Elementary administration and service occupations</b>	14	26%	36%	12%	35%	50%	60%	78%	69%	56%	78%	47%

QC2. What are the main causes of some of your [UP TO 2 OCCUPATIONS RANDOMLY SELECTED] not being fully proficient in their jobs?

In terms of the skills required by employees who are not fully proficient in their jobs, technical, practical or job specific skills are most frequently mentioned (72%). These specialised skills are mentioned by 97% of employers in production and construction businesses with skill gaps, compared with just 66% of employers in service sectors.

More than half the employers with skill gaps mention customer handling skills (57%), planning and organisation skills (57%), oral communication skills (56%), problem solving skills (52%) or team working skills (51%) as being lacking. Skills that need improving amongst staff that are not fully proficient (based on a prompted list) are shown in the figure below.

**Figure 5.5: Skills that need improving amongst staff who are not fully proficient – prompted, multiple response (where have skill gaps)**



Unweighted sample base = 99

QC3. Thinking about your [UP TO 2 OCCUPATIONS RANDOMLY SELECTED] who are not fully proficient, which, if any, of the following skills do you feel need improving?

Focusing on only the most frequently selected ten skill areas, the following table presents the findings by occupation. Again, sample bases are low for employers mentioning each occupation but the data is indicative nonetheless:

**Table 5.6: Skills that need improving amongst staff that are not fully proficient, by occupation (where have skill gaps) caution: small sample bases**

	Unweighted sample bases	Advanced IT or software skills	Oral communication skills	Written communication skills	Customer handling skills	Team working skills	Problem solving skills	Planning and Organisation skills	Management skills	Technical, practical or job specific skills	Leadership skills
<b>Managers, directors and senior officials</b>	15	53%	61%	37%	24%	53%	54%	53%	79%	64%	69%
<b>Professional occupations</b>	8	32%	70%	81%	28%	49%	57%	54%	60%	89%	56%
<b>Associate professional and technical occupations</b>	6	7%	31%	40%	21%	11%	40%	33%	4%	79%	2%
<b>Administrative and secretarial occupations</b>	30	38%	43%	41%	48%	28%	46%	49%	45%	79%	18%
<b>Skilled trades occupations</b>	12	0%	40%	30%	19%	58%	66%	62%	30%	96%	41%
<b>Caring, leisure and other service occupations</b>	5	9%	48%	25%	73%	91%	46%	54%	30%	46%	21%
<b>Sales and customer Service occupations</b>	24	43%	67%	56%	65%	70%	48%	43%	25%	61%	16%
<b>Process, plant and machine operatives</b>	2	0%	100%	8%	100%	100%	8%	100%	0%	100%	8%
<b>Elementary administration and service occupations</b>	14	11%	84%	79%	85%	78%	74%	77%	41%	76%	37%

QC3. Thinking about your [UP TO 2 OCCUPATIONS RANDOMLY SELECTED] who are not fully proficient, which, if any, of the following skills do you feel need improving?

For two-thirds (66%) of employers with a skill gap, the fact that some of their staff are not fully proficient is having an impact on their business' performance. This includes 16% that report it having a *major* rather than just a minor impact.

The most common way that skill gaps are having an impact on business performance is by increasing the workload for other staff (90%). Around half of employers that highlight an impact on performance cite higher operating costs (51%), difficulties meeting customer service objectives (49%), and difficulties meeting quality standards (48%).

**Figure 5.7: Ways in which skill gaps are having an impact on business performance – prompted, multiple response (where have skill gaps)**



Unweighted sample base = 99

QC5. Is the fact that some of your staff are not fully proficient causing this establishment to....?

The majority of employers with skill gaps (89%) intend to address their staff’s skill deficiencies through employee training and development. This increases to 98% of businesses with 26 or more staff, which reflects the fact (see next section) that training for staff is more likely to be arranged in larger organisations.



## 6 Staff Training and Development

### 6.1 Key findings

Around half of all Guernsey employers have a training budget (48%), while the proportion that have a training plan in place for each employee is slightly higher (54%).

The propensity to have either in place increases with business size, as does the propensity to fund or arrange training at all.

The majority of employers (81%) report having formal written job descriptions for each employee.

Two-thirds of employers (64%) report undertaking annual performance reviews with employees. This increases to 89% of businesses with more than 50 employees.

Service sectors, in particular finance and education, health, and public administration, are more likely than production and construction sectors to have any of this training and development infrastructure in place within Guernsey

The provision of training, both on- and off-the-job, is at a higher level within Guernsey than the UK average. Overall 76% of Guernsey employers have funded or arranged any training for employees in the last 12 months. This compares with 66% as reported in the UKCES Employer Skills Survey 2013. Within Guernsey, 65% of employers have funded or arranged any off-the-job training, compared with 49% across the UK; 61% have funded or arranged any on-the-job training, compared with 52% across the UK.

Levels of training are significantly higher than average in finance, education, health, and public administration and the professional, scientific & technical sector. There is relatively little training undertaken in the wholesale, retail & repair sector.

Three-fifths of employers that have funded or arranged training (59%) have used a trainer or training company from off the island of Guernsey to deliver any of it.

This proportion is particularly high in large businesses and in the education, health, and public administration sector, as well as amongst multi-site businesses.

Technical skills and health & safety/first aid training are the types of training that employers are most likely to have arranged or funded in the last 12 months. This reflects the national picture, as suggested by the UKCES Employer Skills Survey 2013.

While induction training and training in new technology are most likely to have been delivered as on-the-job training, training towards professional qualifications is particularly likely to have been delivered off-the-job. The majority of employers have undertaken health & safety/first aid training and management training off-the-job.

More than three-quarters of employers that have funded or arranged training have used in-house facilities (78%). Larger businesses are more likely to have these facilities.

More than half of the employers who have funded or arranged training (56%) have used local training providers. This is more likely amongst single site than multi-site businesses, except those whose multiple sites are all located on Guernsey. Multi-site businesses are more likely than single site organisations to use off-island trainers to deliver training.

On-line training is on a par with in-house training in terms of the extent to which it is delivered within large businesses. Within businesses with more than 50 employees, 94% deliver training on-line; while 95% deliver it in-house.

Seventy per cent of employees (excluding the public administration sector) have received training and development in the last 12 months. Of all employees that have received training, 60% are employed in businesses that employ more than 25 staff.

Managers, directors and senior officials are the occupations most likely to have been provided with training and development opportunities. More than three-quarters of employers that have funded or arranged training or development have trained these staff. Just under half of employers that have trained have provided training to administrative and secretarial occupations.

However, managers, directors and senior officials account for just 16% of all employees that have received training, while staff in administrative and secretarial occupations account for 17%.

By far the most common reason for not funding or arranging training for employees is that staff are already fully proficient i.e. there is no need for training.

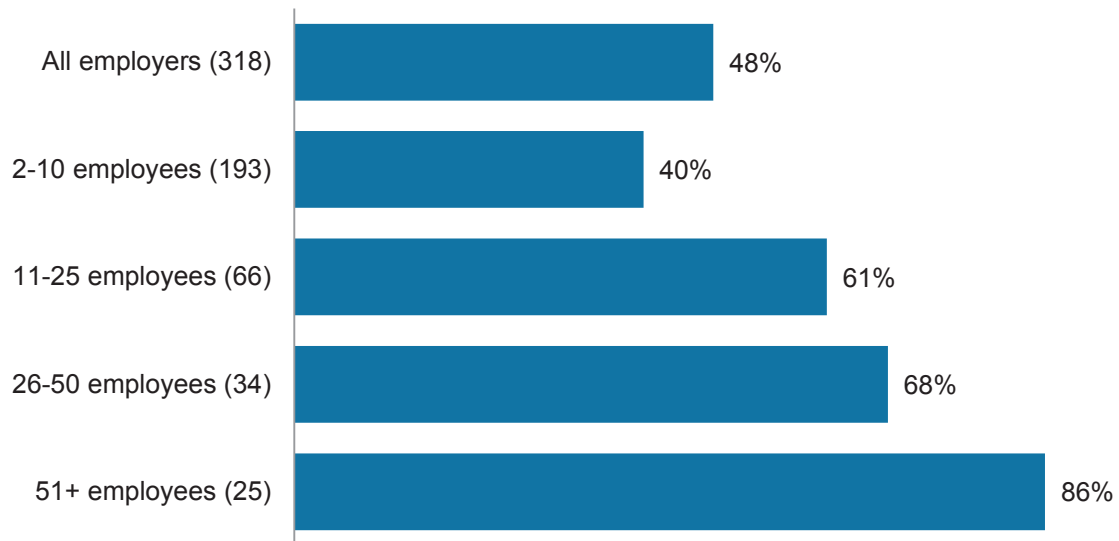
One in four of all employers (regardless of whether they have recently funded or arranged training or not) (23%) report areas of training that are lacking on the island. The range is extensive and no one area is mentioned by more than 10% of these employers. The most frequently mentioned areas include: IT/computers; finance/accountancy/tax; food/hospitality; healthcare; and sales/customer service. A few employers highlight the need for more funded courses.

## 6.2 Training and development infrastructure

### 6.2.1 Training budgets

Around half of employers in Guernsey (48%) have a budget for training expenditure. This proportion increases to 75% of employers with 26 or more employees and 86% with more than 50 employees. It is significantly higher than average within the public sector (73%) – reflecting organisation size to a great extent - and in finance (81%), professional, scientific & technical (69%) and education, health, and public administration (59%) sectors.

**Figure 6.1: Proportion of employers that have a training budget, by business size (all employers)**



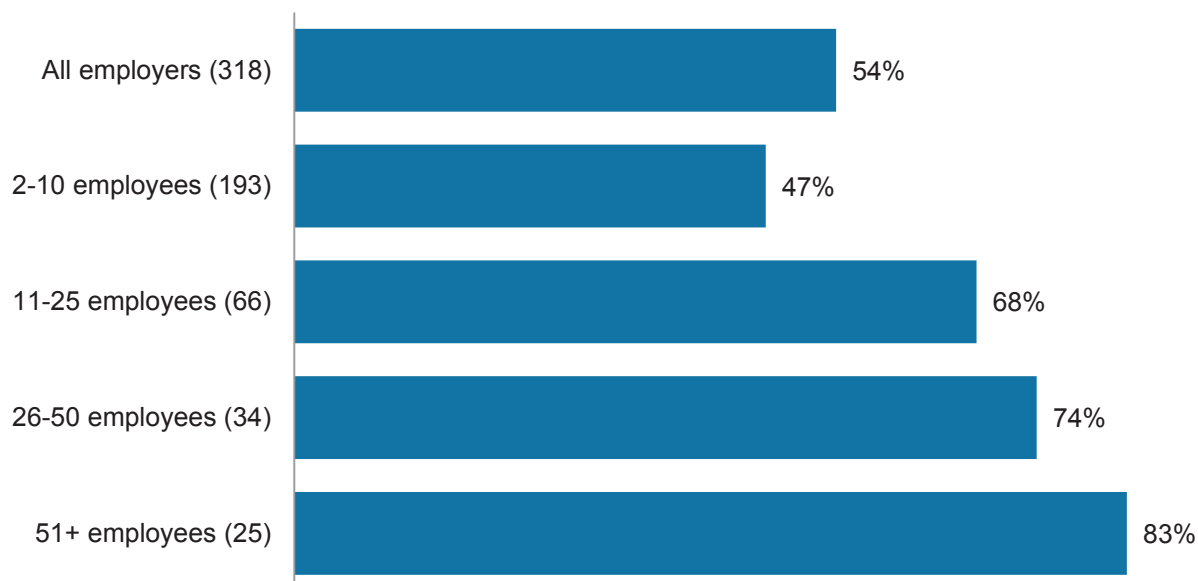
Unweighted sample bases in parentheses

QD1. Does your organisation at that site have any of the following? ... a budget for training expenditure

### 6.2.2 Training plans

More than half of all employers (54%) have a training plan in place for each employee that specifies the level and type of training that the employee will need in the coming year. The propensity to have training plans for employees increases with business size to 78% of businesses with 26 or more employees and 83% of those with more than 50 employees. As with training budgets, public sector organisations are significantly more likely than average to have a training plan for each employee (74%), while the proportion is also greater than average in the finance sector (73%) and in education, health, and public administration (80%).

**Figure 6.2: Proportion of employers that have a training plan for each employee, by business size (all employers)**



Unweighted sample bases in parentheses

QD1. Does your organisation at that site have any of the following? ... a training plan for each employee that specifies the level and type of training that the employee will need in the coming year

### 6.2.3 Formal written job descriptions

Although not relating to training as such, having formal written job descriptions for each employee suggests that employers have taken steps to define the roles, duties and skill requirements of jobs within the business. It also implies that individuals filling those jobs are measured against these defined requirements and that this will play a part in identifying their training and development needs.

Four-fifths of employers (81%) have formal written job descriptions for each employee. There is less variation by business size than seen for training budgets and plans. While the proportion is slightly higher than average in larger businesses (88% amongst employers with 26 or more employees, 94% amongst employers with more than 50 employees), job descriptions are in place in around three-quarters of micro-businesses (76% of employers with between 2 and 10 employees).

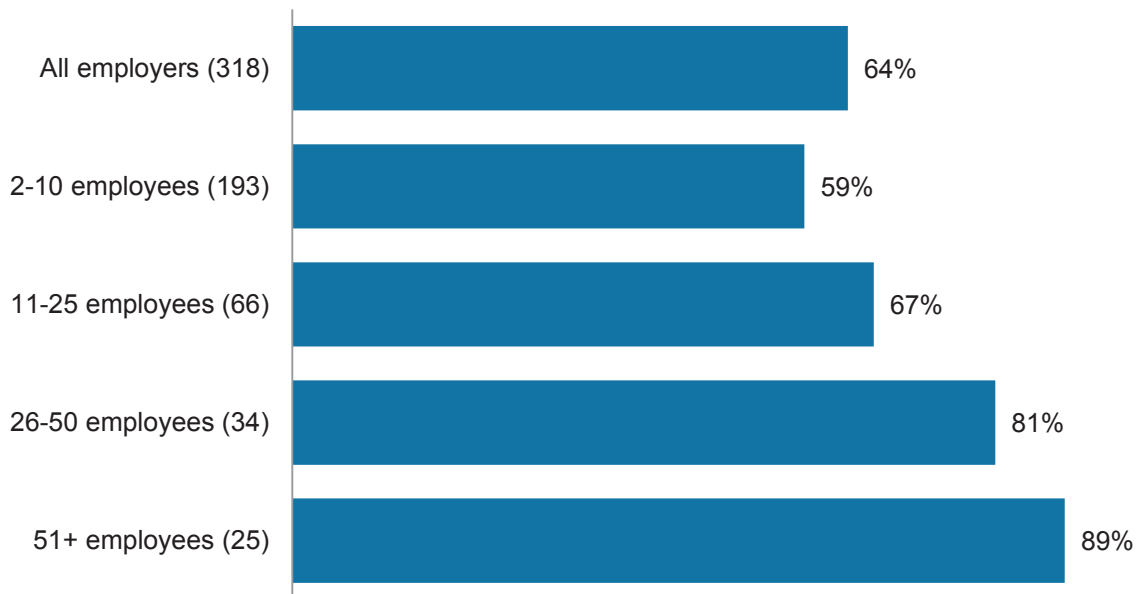
Nearly all employers in education, health, and public administration sectors (97%) have formal written job descriptions for their employees and the proportions are also higher than average in the finance and wholesale, retail & repairs sectors (both 91%).

### 6.2.4 Annual performance reviews

Again, while not relating directly to training, annual performance reviews undertaken with employees are likely to feed into the process of identifying skill deficiencies and personal development needs.

Two-thirds of employers (64%) report undertaking annual performance reviews for each employee. This proportion increases to more than four-fifths of employers with 26 or more employees at the site (84%) and is significantly higher in establishments which are part of multi-site organisations than in those comprising just one site (70%, compared with 37%).

**Figure 6.3: Proportion of employers that conduct an annual performance review for each employee, by business size (all employers)**



Unweighted sample bases in parentheses

QD1. Does your organisation at that site have any of the following? ... annual performance review for each employee

As is the case with regard to formal written job descriptions and training budgets and plans, employers in the finance (94%) and education, health, and public administration (80%) sectors are significantly more likely than average to conduct annual performance reviews.

### 6.2.5 Summary of training and development infrastructure

The following table summarises the extent to which employers across industry sectors in Guernsey have each of the elements of staff training and development in place.

**Table 6.4: Proportion of employers that have training budgets, plans, formal written job descriptions and annual performance reviews for each employee (all employers)**

\* caution: small sample base

	All employers	Manufacturing	Construction	Transport & storage	Wholesale retail & repairs	Hostelry	Info. & Comms	Real Estate & Admin. Support	Finance	Prof. Scientific Technical	Education Health	Other services
<b>A budget for training expenditure</b>	48%	43%	30%	6%	38%	25%	71%	40%	<b>81%</b>	<b>69%</b>	<b>59%</b>	45%
<b>A training plan for each employee</b>	54%	45%	42%	14%	53%	47%	53%	42%	<b>73%</b>	62%	<b>80%</b>	52%
<b>Formal written job description for each employee</b>	81%	78%	67%	89%	<b>91%</b>	77%	72%	65%	<b>91%</b>	87%	<b>97%</b>	59%
<b>Annual performance review for each employee</b>	64%	57%	36%	68%	<b>67%</b>	40%	82%	59%	<b>94%</b>	<b>68%</b>	<b>80%</b>	65%
<b>None of these</b>	11%	5%	29%	11%	6%	<b>19%</b>	9%	24%	0%	7%	1%	13%
<i>Unweighted sample bases</i>	318	14*	19*	8*	54	33	15*	20*	46	34	45	27

QD1. Does your organisation at that site have any of the following?

**Bold font signifies a statistically significantly higher figure compared with the average at the 95% level of confidence**

## 6.3 Training activity

Organisation size is the key determinant of the propensity to offer training. This reflects both the number of staff that potentially need training and the resources available to fund it or facilitate it.

### 6.3.1 Off-the-job training

Off-the-job training is training away from the individual’s immediate work position, whether or not on the business’ premises.

Two-thirds of employers in Guernsey (65%) have arranged or funded any off-the-job training or development for employees at their site in the last 12 months. This compares with 49% reported in the Employer Skills Survey 2013 (UK-wide).

The Guernsey proportion increases with business size to 87% of businesses with 11 or more employees and to 100% of those with more than 50 employees.

### 6.3.2 On-the-job training

On-the-job training is activities that would be recognised as training by the staff and not the sort of learning by experience which could take place all the time. It is on an informal basis.

Three-fifths of employers in Guernsey (61%) have arranged or funded any on-the-job training and development in the last 12 months. This compares with 52% reported in the Employer Skills Survey 2013 (UK-wide).

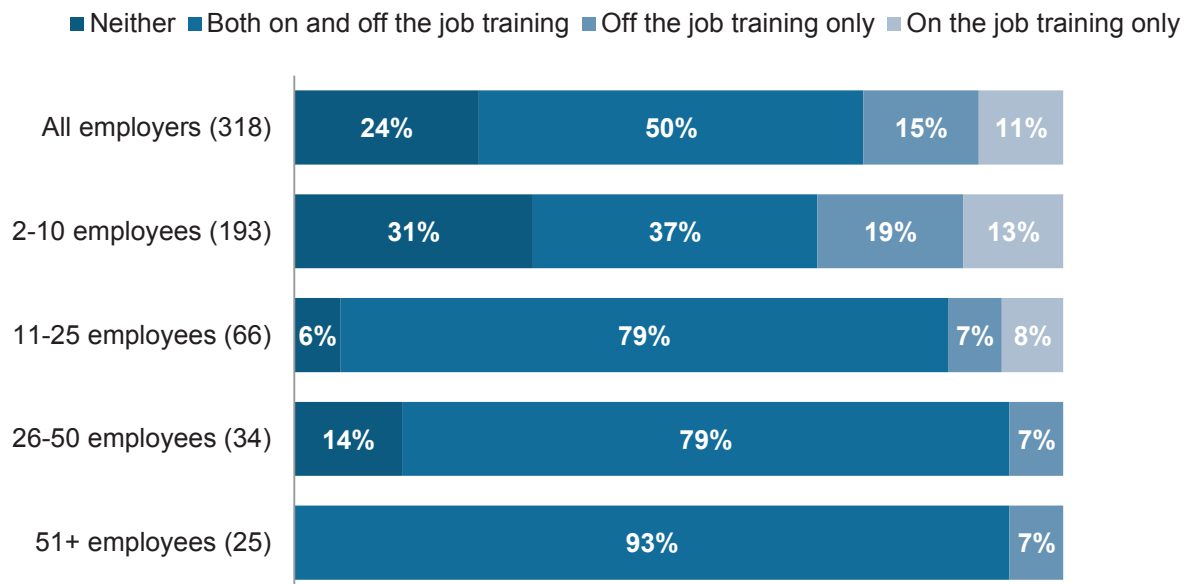
The proportion providing on-the-job training in Guernsey increases to 86% of businesses with 26 or more employees and 93% of those with more than 50 employees.

### 6.3.3 Summary of training

Overall, 76% of Guernsey employers have arranged or funded any on- or off-the-job training in the last 12 months. Half (50%) have arranged or funded both, while only a minority have arranged or funded on-the-job training only (11%) and off-the-job training only (15%). The increased propensity to train at all within larger employers is illustrated in the figure below.

The overall figure of 76% compares with 66% reported in the Employer Skills Survey 2013 (UK-wide).

**Figure 6.5: Proportion of employers that have funded or arranged on or off-the-job training, by business size (all employers)**



Unweighted sample bases in parentheses

QD2. Over the past 12 months, have you arranged or funded any off-the-job training or development for employees at this site?

QD3. Over the past 12 months, have you arranged or funded any on-the-job or informal training and development over the last 12 months.

By sector, levels of training are significantly higher in finance, education, health, and public administration, and professional, scientific & technical sectors. Employers in the wholesale, retail & repair and hostelry sectors are significantly more likely than average *not* to have arranged or funded any training or development for employees in the last 12 months.

**Table 6.6: Proportion of employers that have funded or arranged on or off-the-job training, by sector (all employers)**

	All employers	Manufacturing	Construction	Transport & storage	Wholesale, retail & repairs	Hostelry	Information & communication	Real estate & administration support	Finance	Professional, scientific & technical	Education, health & public administration	Other services
<b>Any off-the-job training</b>	65%	60%	54%	77%	50%	50%	90%	40%	<b>100%</b>	<b>74%</b>	<b>94%</b>	40%
<b>Any on-the-job training</b>	61%	73%	49%	71%	57%	43%	76%	53%	<b>76%</b>	64%	<b>84%</b>	46%
<b>On-the-job training only</b>	11%	17%	9%	11%	<b>15%</b>	11%	10%	24%	<b>0%</b>	<b>17%</b>	0%	21%
<b>Any training</b>	76%	78%	62%	89%	65%	61%	100%	64%	<b>100%</b>	90%	<b>94%</b>	61%
<b>No training</b>	24%	22%	38%	11%	<b>35%</b>	<b>39%</b>	0%	36%	0%	10%	6%	39%
<i>Unweighted sample bases</i>	318	14	19	8	54	33	15	20	46	34	45	27

QD2. Over the past 12 months, have you arranged or funded any off-the-job training or development for employees at this site?

QD3. Over the past 12 months, have you arranged or funded any on-the-job or informal training and development over the last 12 months.

**Bold font signifies a statistically significantly higher figure compared with the average at the 95% level of confidence**

## 6.4 Training delivery

### 6.4.1 Sourcing external training

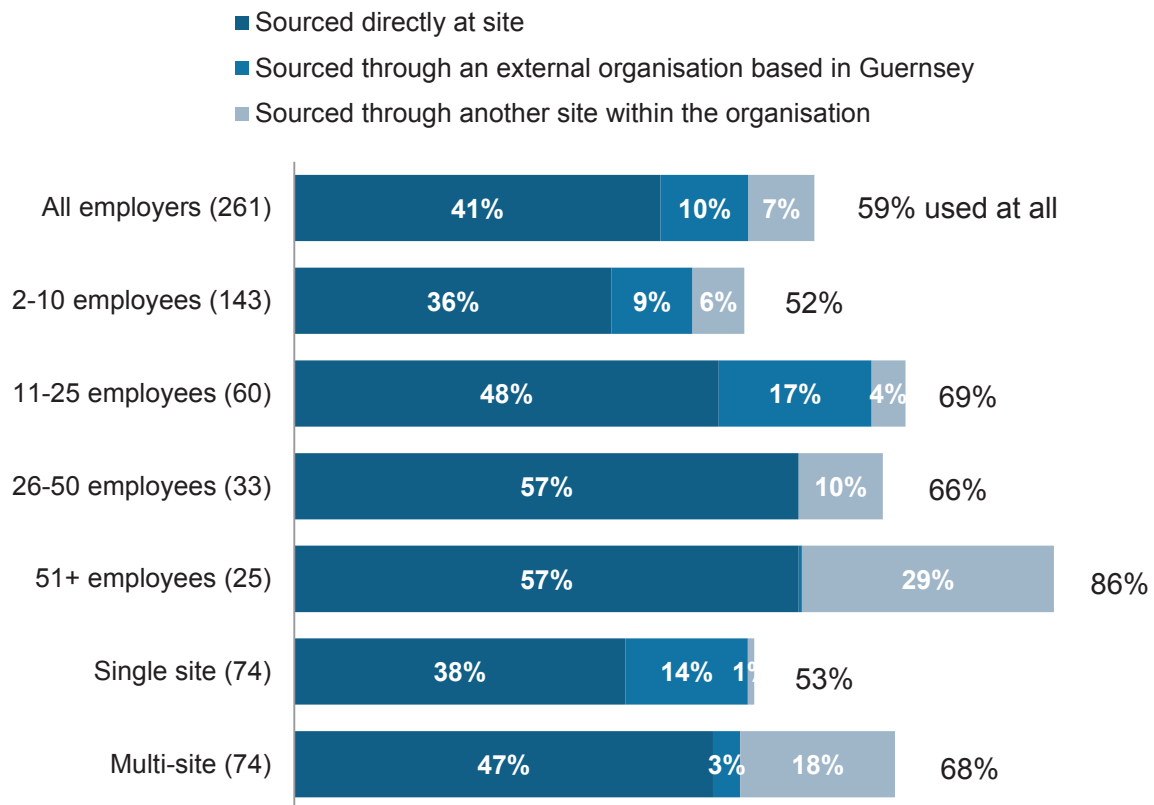
Three-fifths (59%) of employers that have arranged or funded training have used a trainer or training company from off the island of Guernsey to deliver any of it.

This proportion is significantly higher than average amongst larger employers (74% of businesses with 26 or more employees) and within the education, health, and public administration sector (76%). It is also significantly higher within organisations operating from more than one site (68%) than within single site organisations (53%).



In the majority of cases, the off-island trainer or training company was sourced directly by the employer from their site (70%). There is little variation by business size or sector in this respect. However, larger employers (with 26 or more employees) are significantly less likely to use an external organisation based on the island to source training providers from elsewhere than businesses with 25 or fewer employees (less than 1%, compared with 20%), while a quarter of these larger employers use another site within the organisation to do so (25% of businesses with 26 or more employees, compared with 10% of smaller businesses).

**Figure 6.7: Use of external trainers or training companies based off-island, by business size and number of sites (where arranged/funded training in the last 12 months)**



Unweighted sample bases in parentheses

QD4. Has any of the training that you have delivered been provided by a trainer or training company that is not based on the island of Guernsey?

QD5. Did you identify and source this trainer or training company yourself or did you source them through an organisation based on the island of Guernsey?

#### 6.4.2 Types of training delivered

When asked about the types of training arranged or funded in the last 12 months, employers are most likely to have provided training in technical skills (66%) and health & safety/first aid training (62%). These are the most commonly provided types of training across the UK, based on the findings from the UKCES Employer Skills Survey 2013.

The types of training delivered are summarised in the figure below.

**Figure 6.8: Types of training arranged or funded for employees at that site over the past year, prompted, multiple response (where arranged/funded training in the last 12 months)**



Unweighted sample base = 261

QD6. Which of the following types of training have you arranged or funded for employees at that site over the past year?

The propensity to have arranged or funded *any* of the types of training increases with employer size. The sharpest increase by employer size is with regard to induction training, which 90% of employers with 26 or more employees have funded or arranged, compared with just 48% of those with 10 or fewer. The extent of induction training is dictated by the extent of recruitment and larger employers recruit on a more frequent or even on a continuous basis.

There is also a significant increase in the propensity to fund or arrange training relating to professional qualifications in employers with 26 or more employees (82%, compared with 46% of those with 25 or fewer employees).

Only a third (31%) of employers with between 2 and 10 employees that have trained have funded or arranged management training and the proportion of employers that have provided this type of training increases significantly where there are 11 or more employees (57% of businesses that employ between 11 and 25 employees).

In terms of supervisory training, the proportion is relatively low within businesses with 50 or fewer employees (26%), but increases to 92% of businesses with more than 50 employees.

**Table 6.9: Type of training arranged or funded in the past year, by business size, prompted, multiple response (where have arranged/funded training in the last 12 months)**

	All employers	No. of employees at that site					ESS 2013
		2-10	11-25	26-50	51+	26+	
Training in technical skills	66%	62%	66%	77%	95%	<b>84%</b>	85%
Health & safety/first aid training	62%	53%	<b>74%</b>	71%	95%	<b>81%</b>	74%
Induction training	59%	48%	<b>67%</b>	<b>84%</b>	99%	<b>90%</b>	58%
Training in new technology	55%	53%	50%	64%	73%	68%	-
Training towards professional qualifications (eg, ACCA, CMI, ICOSA)	52%	42%	<b>60%</b>	<b>84%</b>	79%	<b>82%</b>	-
Training in soft skills such as communication, problem solving and team working	43%	36%	50%	<b>57%</b>	75%	<b>64%</b>	-
Management training	41%	31%	<b>57%</b>	47%	82%	<b>61%</b>	35%
Supervisory training	30%	23%	28%	35%	92%	<b>59%</b>	34%
Any other types	19%	16%	21%	33%	15%	26%	-
<i>Unweighted sample bases</i>	261	143	60	33	25	58	69,842

QD6. Which of the following types of training have you arranged or funded for employees at that site over the past year?

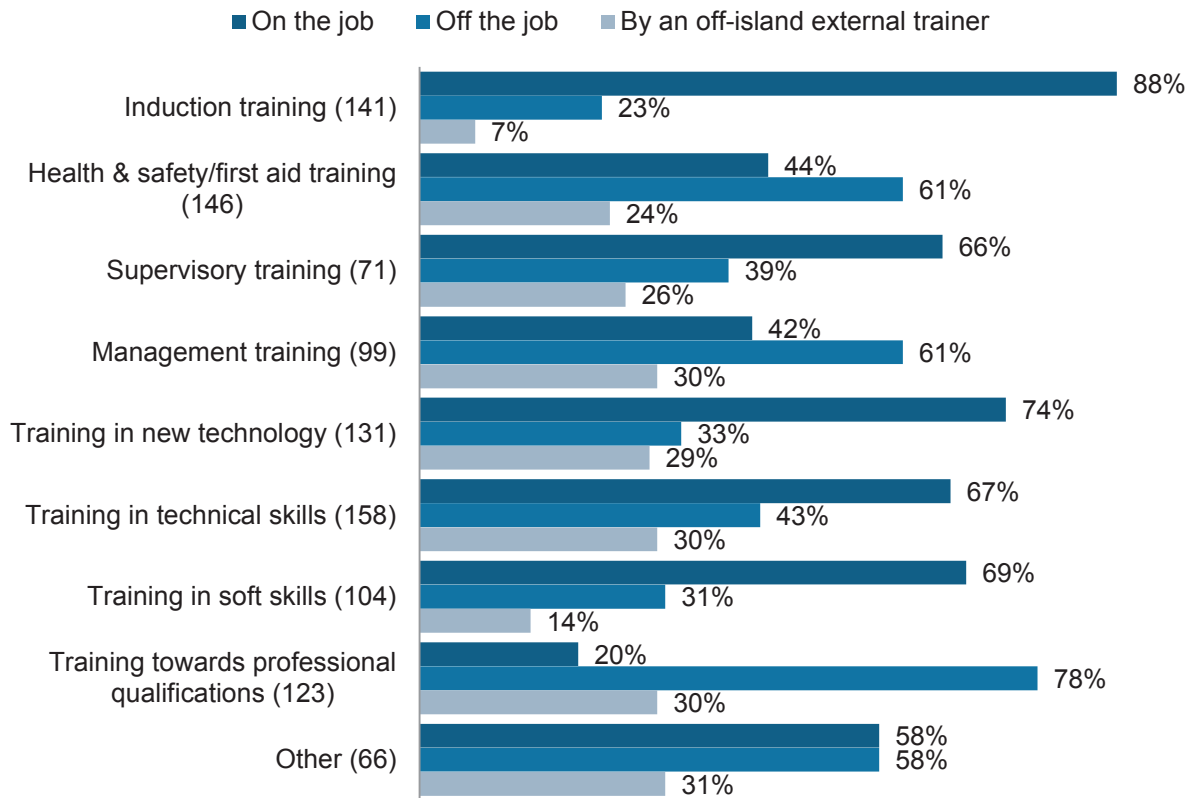
**Bold font signifies a statistically significantly higher figure compared with the average minus the sub-group tested**

Other types of training that have been funded or arranged include product training, compliance training, and training in the prevention of money laundering.

In terms of how the different types of training are delivered, induction training and training in new technology are particularly likely to be undertaken on-the-job (88% and 74% respectively of employers funding or arranging these types of training). Training towards professional qualifications is particularly likely to be undertaken off-the-job (78%), whilst the majority of employers undertaking health & safety/first aid training and management training have delivered this off-the-job (both 61%).

While only a small minority of employers have used a trainer or training company that is not based in Guernsey to deliver induction training (7%) and training in soft skills (14%), between one in four and one in three employers have used off-island trainers to deliver other types of training. Management, professional, and technical training are all reported to have been delivered by non-Guernsey based trainers by three in ten employers that have funded or arranged this type of training.

**Figure 6.10: Ways in which types of training were delivered, prompted, multiple response (where arranged/funded various types of training)**



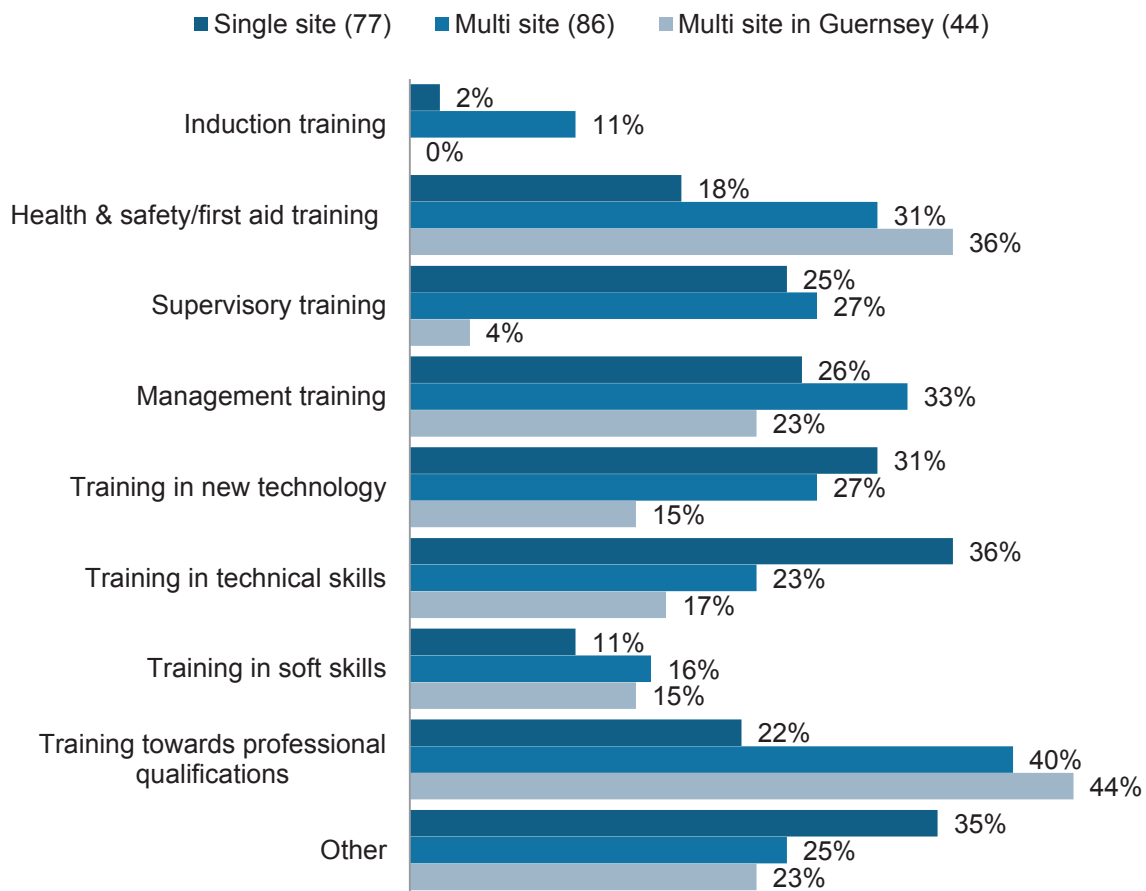
Unweighted sample bases in parentheses

QD7. Was this [TYPE OF TRAINING] undertaken...?

Multi-site businesses are more likely to use trainers based off-island than single site businesses for induction training, health & safety/first aid training, and training towards professional qualifications.

Businesses with multiple sites in Guernsey tend to be less likely to use non-Guernsey-based external trainers in all areas except for health & safety/first aid training and training towards professional qualifications, where they are more likely to use off-island trainers than average among all multi-site businesses.

**Figure 6.11: Use of trainers/training companies not based on the island of Guernsey for delivering various types of training, by number of sites (where arranged/funded various types of training)**



Unweighted sample bases in parentheses

QD7. Was this [TYPE OF TRAINING] undertaken...?

### 6.4.3 Organisation used to deliver training

More than three-quarters of employers that have funded or arranged training in the last 12 months (78%) have used in-house facilities, either at the site or at another site on or outside of Guernsey. Training in-house increases with business size, reflecting the extent to which larger employers are more likely to have these facilities.

More than half of employers who have funded or arranged training (56%) have used 'other local training providers' (that is, providers other than those identified in a list offered to respondents – see next figure). This proportion is significantly higher within single site employers than within employers with multiple sites (61%, compared with 48%), although employers with more than one site *on Guernsey* are as likely as single site employers to do so (62%).

Multi-site employers are significantly more likely than single site employers to have used professional bodies based outside of Guernsey (53%, compared with 36%), although, again, employers with more than one site *on Guernsey* are less likely than average amongst multi-site employers to have used off-island professional bodies (46%).

**Table 6.12: Organisations which employers have used to deliver training, prompted, multiple response (where arranged/funded training in the last 12 months)**

	Number of employees at that site					Number of sites		
	All employers	2-10 employees	11-25 employees	26-50 employees	51+ employees	Single site	Multi site	Multi site in Guernsey
<b>In-house, either in Guernsey or elsewhere</b>	78%	72%	88%	90%	95%	76%	82%	86%
<b>Other local training providers</b>	56%	47%	66%	81%	76%	61%	48%	62%
<b>Through professional bodies locally</b>	46%	35%	60%	76%	62%	46%	45%	51%
<b>Online</b>	46%	38%	50%	61%	94%	36%	60%	49%
<b>Through professional bodies off island</b>	43%	36%	52%	46%	81%	36%	53%	46%
<b>Local College of Further Education</b>	31%	25%	36%	44%	60%	35%	24%	26%
<b>GTA University centre</b>	31%	22%	43%	54%	60%	30%	34%	34%
<b>Institute of Health and Social Care Studies</b>	7%	3%	15%	10%	16%	6%	8%	16%
<b>Other</b>	11%	12%	9%	10%	14%	10%	12%	16%
<b>None - all training is provided in house</b>	5%	7%	2%	0%	0%	6%	3%	3%
<i>Unweighted sample bases</i>	261	143	60	33	25	146	115	59

QD8. Which, if any, of the following has your organisation used to train its staff?

On-line training has been undertaken by nearly half the employers who have funded or arranged training in the last year (46%) and this increases to 94% of businesses with more than 50 employees. As a means of delivering staff training it is on a par with in-house training amongst these larger employers.

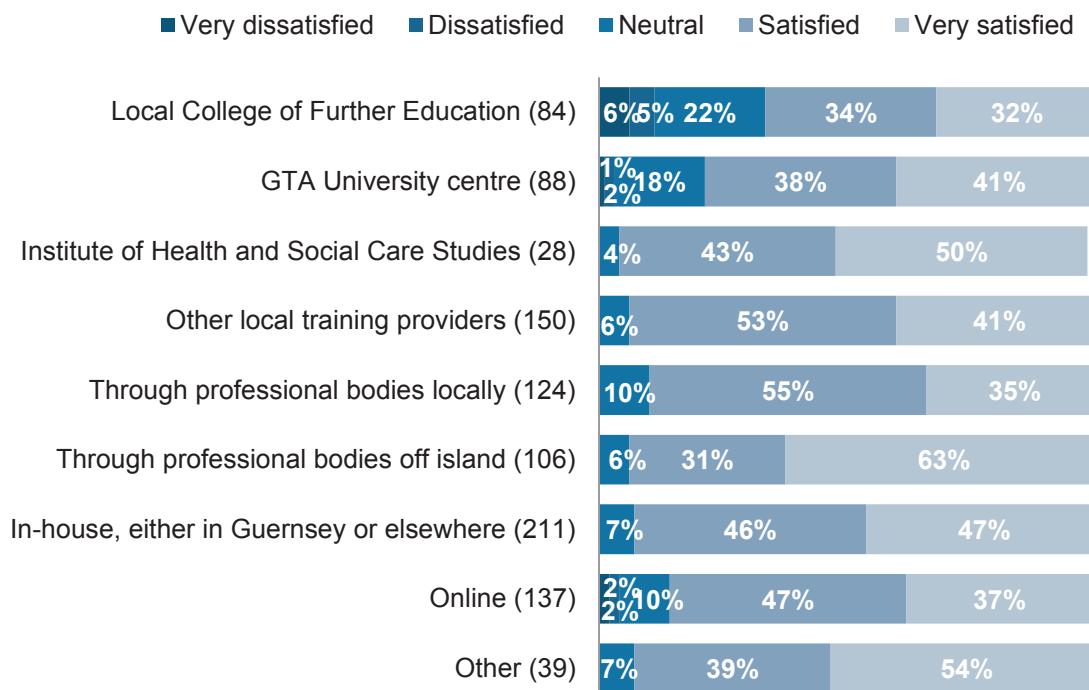
One in twenty employers who have trained their staff in the last year (5%) arrange all their training in-house and most of these employers employ up to 10 staff (7% of these). The proportion is significantly higher than average within the wholesale, retail & repair sector (15%) and amongst employers that have only funded or arranged on-the-job training (24%).

### 6.4.4 Satisfaction with organisations that have been used

When asked to rate their level of satisfaction with the quality of the training delivered by organisations used (including rating their in-house facilities), the majority of employers indicated satisfaction with each, although levels of satisfaction with their local college of further education is lower than for other providers (66%, compared with at least 78%).

Employers are most likely to have been satisfied overall with other local training providers (94% satisfied) and professional bodies off-island (also 94%).

**Figure 6.13: Satisfaction with organisations used to train staff (where used)**



Unweighted sample bases in parentheses

QD9. How satisfied have you been with the quality of the training delivered by [ORGANISATION]?

### 6.4.5 Staff who have received training and development

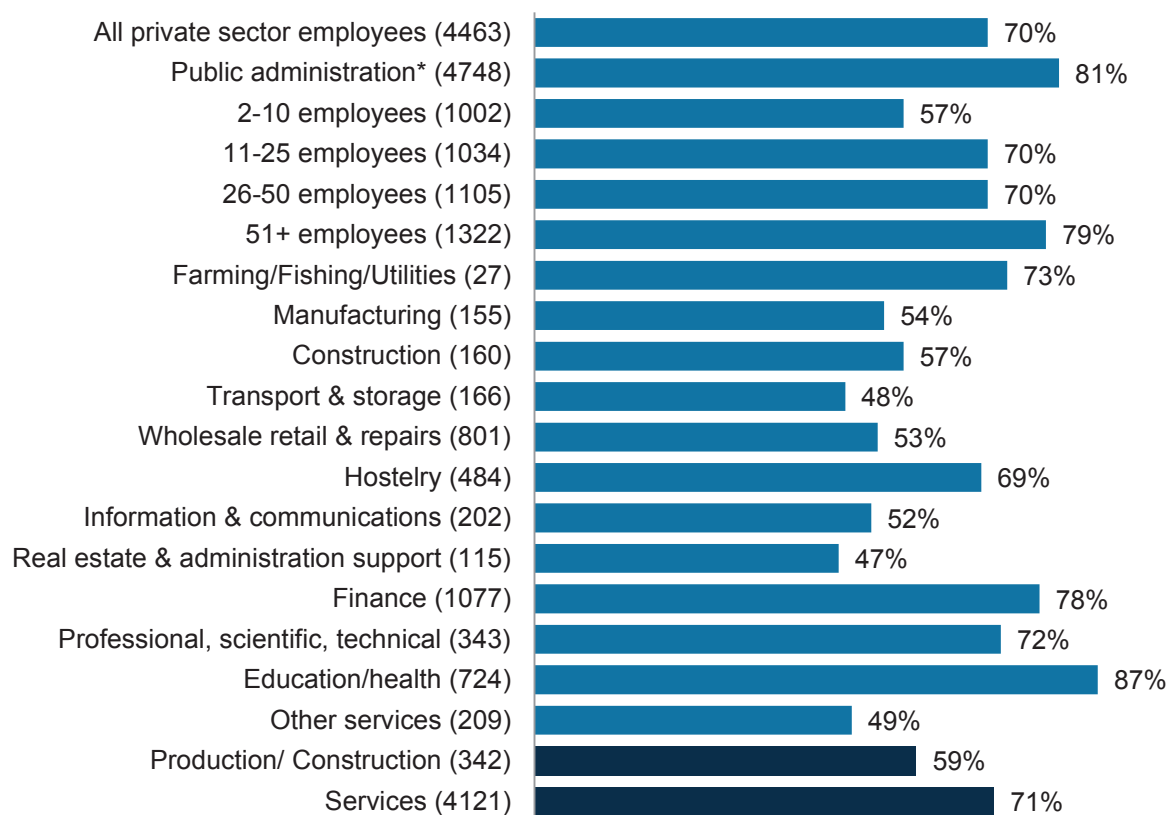
As a proportion of all mainly private sector employees<sup>9</sup> across Guernsey, 70% have received training and development in the last 12 months. This proportion increases with business size, from 57% of staff within businesses that employ between 2 and 10 employees to 76% of those that employ more than 25 staff. It should be noted that there is a higher propensity for larger employers to fund or arrange training and that this minority of employers will employ the majority of the workforce. Of all employees that have received training, 60% are employed in businesses that employ more than 25 staff.

<sup>9</sup> Not including the public administration sector but including education and health some of which operates within the public sector

Particularly high proportions of the total workforce have received training in education & health (87%) and finance (78%) sectors. Lower proportions of the workforce than average have received training in several sectors (see figure below). This further highlights the extent to which a few larger employers in some sectors have trained and developed a disproportionately high proportion of the workforce. Within large public administration organisations (i.e. public sector government departments on the island), 81% of the workforce has been trained in the last 12 months.

**Figure 6.14: Proportion of the workforce that have received training and development, by business size and sector (all employees)**

\*Public administration employees are not included in the total workforce nor in the size and sector samples presented



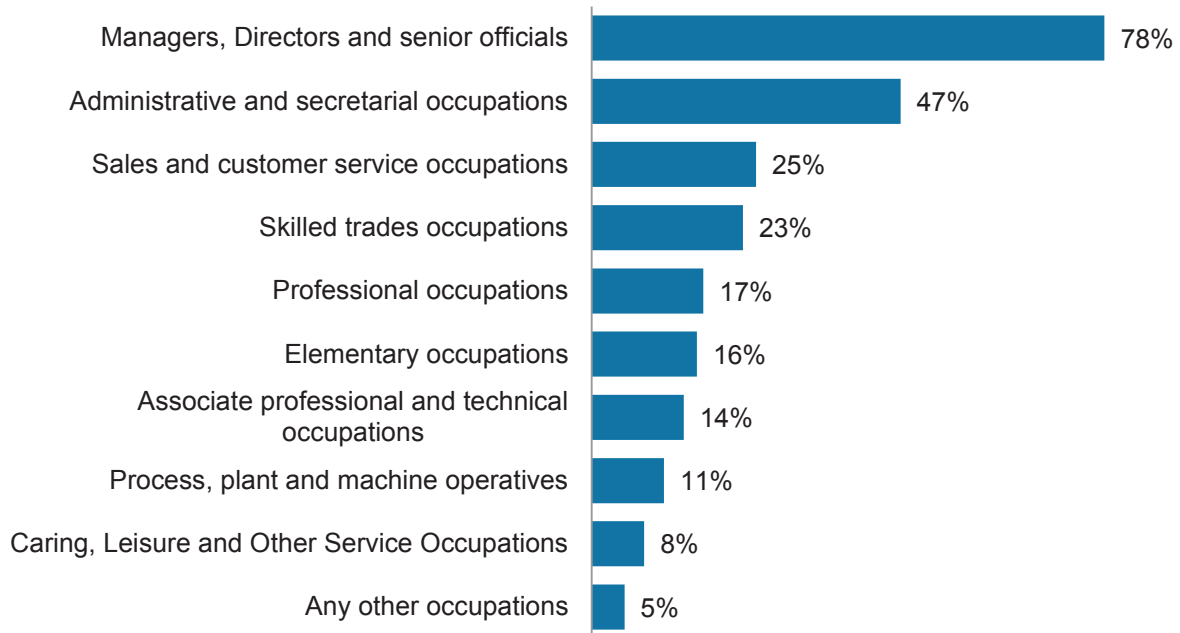
Unweighted sample bases in parentheses

QD10. Over the last 12 months, how many staff employed at this site have you funded or arranged training and development for?

More than three-quarters of employers who have funded or arranged training and development (78%) have trained and developed managers, directors and senior officials. This increases to 95% of businesses with more than 25 employees. Just under half (47%) have provided administrative and secretarial workers with training and development.



**Figure 6.15: Occupations for whom employers have provided training or development (where arranged/funded training)**



Unweighted sample base = 261

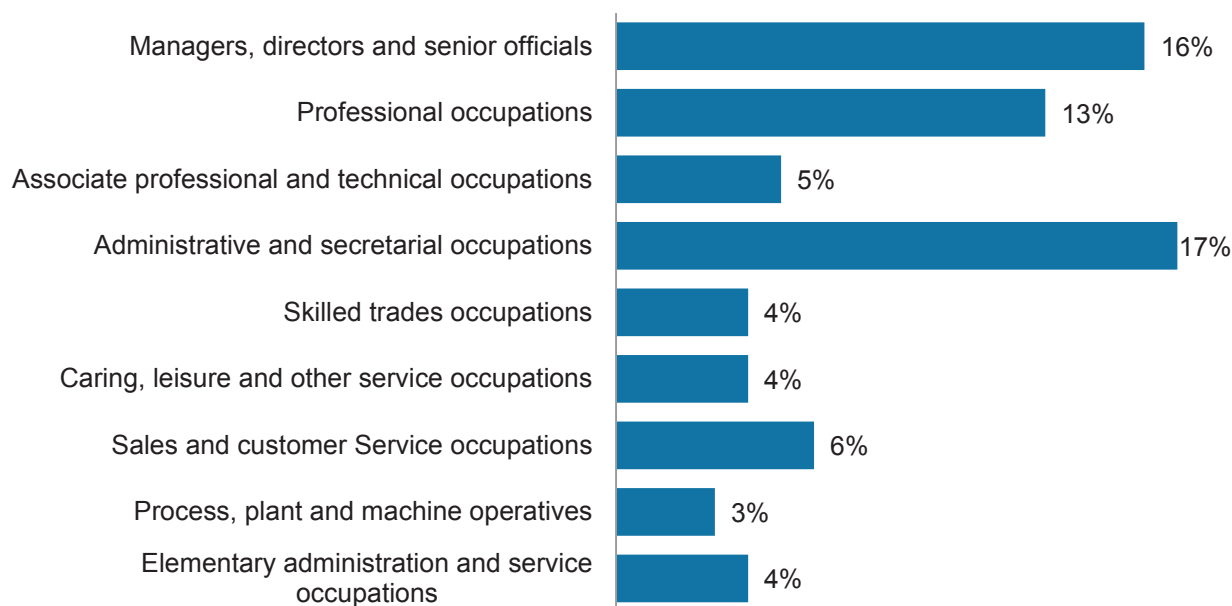
QD11a. In which of the following occupations have you funded or arranged training over the last 12 months, whether on or off the job?

Managers, directors and senior officials however, account for just 16% of all employees that have received training (outside of the public administration sector); administrative and secretarial occupations account for 17% (see next figure).

While there is little variation in the proportion of employees who are in managerial occupations who have received training by business size, the proportion who are in administrative and secretarial occupations is significantly higher in larger businesses (20% within businesses with more than 25 staff, compared with 13% within those with between 2 and 10 staff).

Within public administration, 36% of those who have received training and development are in professional occupations, with no more than one in ten within any other occupational group.

**Figure 6.16: Breakdown of all employees that have received training and development by occupation (employees that have received training and development in the last 12 months)**

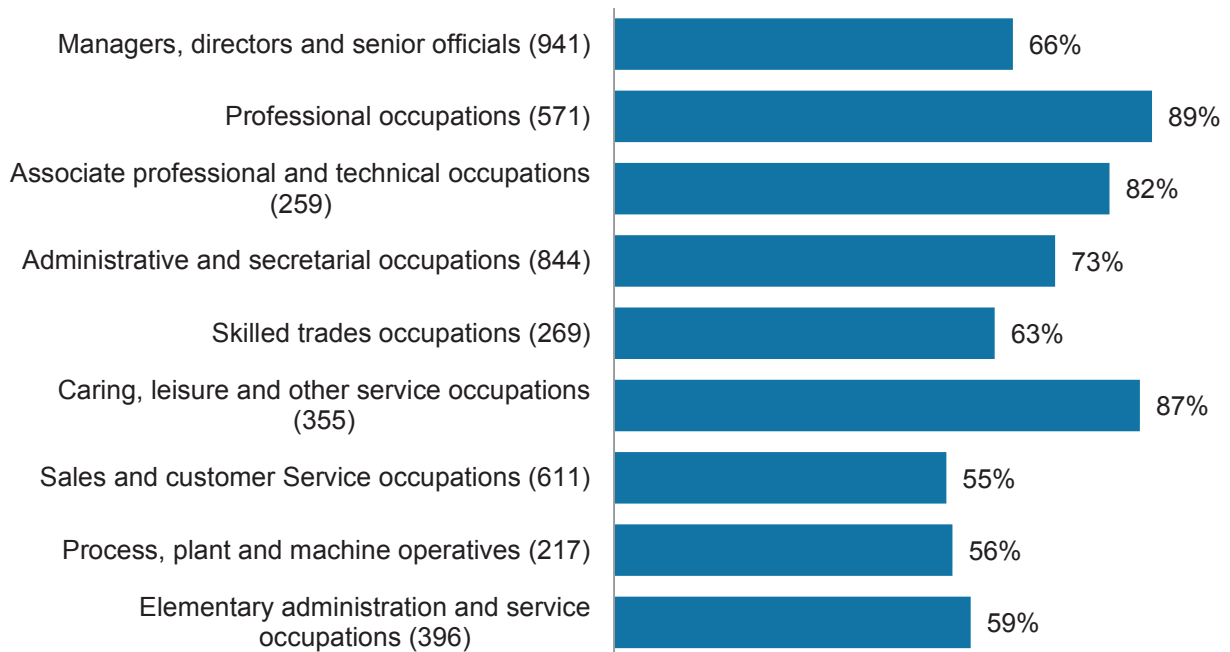


Unweighted sample base (employees) = 4463

QD11b. How many [OCCUPATION] have you funded or arranged training for over the last 12 months?

As a proportion of all employees employed in each occupation, those in professional occupations (89% of all these occupations) and caring, leisure and other service occupations (87%) are most likely to have been in receipt of training and development, with staff employed in low/un-skilled occupations least likely to have benefited.

**Figure 6.17: Proportion of employees in each occupational group that have received training and development in the last 12 months (all employees in occupations – valid responses only)**



Unweighted sample bases (employees) in parentheses

QD11b. How many [OCCUPATION] have you funded or arranged training for over the last 12 months?

#### 6.4.6 Reasons for not funding or arranging training

When asked why their organisation had not funded or arranged training for any employees at that site in the last 12 months, the majority stated that there had been no need (73% gave the reason as all staff fully proficient/no need).

Just 2-3% each cited other reasons including: no money available for training; start dates or times of courses being inconvenient; appropriate courses not being available locally; external courses being too expensive; no time to organise training; training is not a priority and employees not having the time to do any training.

One in twenty employers who have not funded or arranged training (5%) cited the reason as being that no training has been available in the relevant subject area. A further 23% of all employers (regardless of recent training activity or lack thereof) report that there are areas of training not available locally that they would like to see being offered on the island.

This proportion, those who consider the range of training available locally to be inadequate, increases to 42% of businesses with between 26 and 50 employees and is significantly higher within the private sector than the public sector (23%, compared with 6%). It is significantly higher than average in the education and health sector (42%).

In terms of the areas of training that are lacking locally, the main areas mentioned include IT/computers (10% of those identifying a lack of local availability); finance/accountancy/tax (9%); food/hospitality (8%); healthcare (5%); and sales/customer service (3%). Other areas mentioned included (as reflected in respondents' comments):

University courses, where there are not enough students then the course is cancelled, so on-line courses would be better or more university availability.

Sales training, technique, presentation skills, accounting - quick books.

I think we lack secretarial skills; I would like it if colleges did secretarial courses.

Affordable, ongoing middle management training programme (1 year evening course at the local college of FE )

Relevance of UK laws applying to Guernsey law and a course to enable and make it easier for the older students to study.

Funded courses limited. Very poor for intermediate, advanced or professional level. There are not that many technical courses available on the island; it can be limited.

Professional level ICSA to be delivered at the Guernsey college in the evening.

Decorating apprenticeships

Childcare - above Level 3 (higher education); specific childcare training

Update-to-date technical training.

Sales/customer care, and managerial skills

Stone Masonry. Work ethic not being built in school.

Basic nutrition advice.

All aspects of vehicle body repair and paint spraying.

It was nice that the States of Guernsey pay apprentices to gain qualifications in the UK.

BHSAI qualifications (introduction to teach horse riding).

Veterinary nursing.

Fishmongery and butchery training.

Soft skills.

Step degree that is not being offered on island, and the candidate has to travel to the UK, which is a pain.

More technical courses, accounting update courses.

Clockmaking.

CAD courses, technical skills in metal working.

CAD design - technical drawing.

Soft skills; communication skills.

The courses are too long and expensive; its quicker and cheaper to go off island to get people trained.

Professional bodies; National Association of Funeral Directors.

Supervising councillors.

Financial support for training would be useful.

Employment relations; relevant to Guernsey employment law.

Professional body training (specific to industry/trade)/

Governing body for estate agents and a code of ethics for the estates agency.

Training programmes for the estate agents bodies.

Travel courses at the college of FE and GDF courses; NVQ's in the travel industry.

Detailed landscaping courses involving machinery.

Creative training or services.

Arts specialist training.

Training specific to the motor industry (vehicle/body paintwork).

Modern electronics (mechanical).

Front of house.

## Appendix I: Occupation Descriptions

### Managers, directors or senior officials:

Occupations where main tasks consist of direction and co-ordination of organisations and businesses. This can include the management of internal departments/sections.

### Professional occupations:

High-level occupations in the natural sciences, engineering, life sciences, social sciences, humanities and related fields.

Includes professional engineers, software and IT professionals, accountants, chemists and scientific researchers, solicitors and lawyers, accountants, IT professionals, economists, architects, actuaries, doctors, engineers, doctors, nurses, midwives, psychologists, teachers, social workers, librarians, accountants, economists, IT professionals, engineers.

### Associate professional and technical occupations:

Occupations in this group will usually require a relevant high level vocational qualification, often involving substantial period of full time training or further study. Main tasks require experience and knowledge to assist in supporting professionals or managers.

Includes science and engineering technicians, lab technicians, IT technicians, accounting technicians, insurance underwriters, finance and investment analysts and advisers, writers/journalists, buyers, sales reps, estate agents, pilots, graphic designers, fitness instructors, junior police/fire/prison officers, therapists, paramedics, community workers, careers advisors, health and safety officers, housing officers, writers/journalists, fitness instructors.

### Administrative or secretarial occupations:

Administrative and secretarial occupations undertake general admin, clerical, secretarial work and perform a variety of specialist client orientated clerical duties. Generally speaking, all those with 'clerk', 'secretary' in the job title will fall into this group, including financial clerks and book-keepers.

Includes secretaries, receptionists & PAs, telephonists, book-keepers, credit controllers/wage clerks, assistants/clerks, communication operators, market research interviewers, book-keepers, credit controllers/wage clerks, pension and insurance clerks, office assistants, database assistants, local government officers and assistants, civil service executive officers.

### Skilled trades occupations:

Skilled trades occupations require a substantial period of training. Main tasks involve the performance of complex physical duties that normally involve initiative, manual dexterity and other practical skills.

Includes electricians, motor mechanics, machine setters/tool makers, TV engineers, plumbers, carpenters, printers, chefs, butchers, furniture makers, farmers.

Caring, leisure and other service occupations:

Caring, Leisure and Other Service Occupations involve the provision of service to customers whether in a public protective or personal care capacity. Main tasks usually involve the care of the sick, elderly and children and the provision of travel care and hygiene services. These job-roles generally require a good standard of general education.

Includes care assistants, nursery nurses, travel agents, travel assistants, sport and leisure assistants, hairdressers and beauticians, childminders, housekeepers, ambulance staff, teaching assistants, pest control officers, dental/ veterinary nurses, caretakers, sport and leisure assistants.

Sales and customer service occupations:

These occupations sell goods and services, accept payment and replenish stocks, provide information to potential clients and additional services to customers after the point of sale.

Includes sales assistants and retail cashiers, telesales, call centre agents and customer care occupations.

Process, plant and machine operatives:

Process, plant and machine operative occupations operate vehicles and other mobile and stationary machinery, and monitor industrial and plant equipment, or to assemble products. Most will not have a particular standard of education but will usually have formal experience related training.

All transport and mobile machine drivers belong in this group. Includes plant and machine operators plus routine operatives (sorters, assemblers) and HGV, van, fork lift, bus and taxi drivers.

Elementary occupations:

Elementary occupations involve mostly routine tasks usually involving use of simple hand held tools and in some cases physical effort. Most do not require formal educational qualifications.

Includes labourers, packers, goods handling and storage staff, security guards, cleaners, bar staff, shelf fillers, kitchen/catering assistants, waitresses, postal workers, dry cleaners, road sweepers, traffic wardens and caretakers.

## Appendix II: Statement of Terms

### **Compliance with International Standards**

BMG complies with the International Standard for Quality Management Systems requirements (ISO 9001:2008) and the International Standard for Market, opinion and social research service requirements (ISO 20252:2012) and The International Standard for Information Security Management ISO 27001:2005.

### **Interpretation and publication of results**

The interpretation of the results as reported in this document pertain to the research problem and are supported by the empirical findings of this research project and, where applicable, by other data. These interpretations and recommendations are based on empirical findings and are distinguishable from personal views and opinions.

BMG will not be publish any part of these results without the written and informed consent of the client.

### **Ethical practice**

BMG promotes ethical practice in research: We conduct our work responsibly and in light of the legal and moral codes of society.

We have a responsibility to maintain high scientific standards in the methods employed in the collection and dissemination of data, in the impartial assessment and dissemination of findings and in the maintenance of standards commensurate with professional integrity.

We recognise we have a duty of care to all those undertaking and participating in research and strive to protect subjects from undue harm arising as a consequence of their participation in research. This requires that subjects' participation should be as fully informed as possible and no group should be disadvantaged by routinely being excluded from consideration. All adequate steps shall be taken by both agency and client to ensure that the identity of each respondent participating in the research is protected.





With more than 25 years' experience, BMG Research has established a strong reputation for delivering high quality research and consultancy.

BMG serves both the public and the private sector, providing market and customer insight which is vital in the development of plans, the support of campaigns and the evaluation of performance.

Innovation and development is very much at the heart of our business, and considerable attention is paid to the utilisation of the most up to date technologies and information systems to ensure that market and customer intelligence is widely shared.

