

Submission to the Senate Committee Inquiry into Small Business Employment

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Submission to the Inquiry into Small Business Employment Issues

Summary

This submission is divided into three parts. The first part of the submission discusses issues and current opportunities for small business training provided by the VET sector, and possible future initiatives and incentives for training by small firms. The second part of the submission provides supporting statistical information for small businesses on educational attainment, participation in education and training, use of Group Training Companies, satisfaction with graduates of Vocational Education and Training (VET), and VET graduates. The third part of this submission consists of a report by Kearns (2001) on the provision of training and learning services for small business.

The main messages arising from this submission are that:

- Small businesses do not undertake structured training to the same extent as other sized businesses: they rely to a large degree on 'short sharp' training specific to immediate business needs. This type of training is very important to small business, but a balance of longer term structured training is important for business success;
- The Vocational Education and Training system has a potentially significant role to play in providing training for small business. Indeed, the VET system already has a range of training options available to meet the needs of small business;
- Small businesses that do use the formal VET system are as satisfied as other businesses with the skills and training provided. The difficulty is overcoming several reasons as to why small business perceive that formal VET is not for them.

Further Information

For further information or queries in relation to this submission, please contact:

Mr Phil Loveder Manager, Research and Consulting Services NCVER 252 Kensington Road LEABROOK SA 5068 Ph: (08) 8333 8400

Fx: (08) 8331 9211

Section 1: Importance of training in small business and the relevance of VET

Introduction

Small business comprises a large proportion of Australia's economy. The latest available figures from the Australian Bureau of Statistics indicate that 96% of all businesses in Australia were small businesses, and that small businesses account for a little under half of the total number of Australian employees (ABS, 1999).

Also based on latest available figures, the extent of training and amount of expenditure on training by small businesses is small in comparison to medium and large enterprises (Gibb, 1998). According to the Australian Bureau of Statistics (1999), while 90% of larger businesses provided some staff training during 1997/98, only 55% of small businesses did so. Additionally, the type of training that does occur tends to be informal rather than formal structured training.

Hawke (2000) puts forward several reasons as to why small businesses do not engage in formal training to the same extent as other businesses. Small businesses have significant concerns regarding the provision of structured training such as the level of expense involved, questions of relevance to their businesses, and a perception that skills (derived from training) are not relevant to growth and success. As such, small businesses tend to prefer training that is short, sharp and specific to immediate business needs (NCVER, 1998).

Interestingly, the Survey of Employer Views on Vocational Education and Training¹ undertaken every two years (including in 2001) indicates that small business satisfaction with VET is on a par with medium and large businesses. So although small businesses are initially reluctant to engage in structured training through the VET system, once they do, they tend to be very satisfied with the training (ANTA, 2002, in print). Table 15 in Section 2 of this submission provides data supporting the notion of small business satisfaction with VET.

There is evidence suggesting that in addition to the necessary short-term training aimed at specific needs, small business would benefit from investment in more

¹ This survey collects a variety of information on employers views on VET including overall measures of satisfaction with VET and the skills of graduates.

longer-term structured forms of training. This could also lead to small business having a greater capacity to employ more people, as well as attracting people to employment in small business

Kilpatrick and Crowley (1999) explore links between (structured) training and business success. Additionally, according to Kearns (2001), longer-term training and development is a vital ingredient in building entrepreneurship and fostering innovation in the context of a global knowledge economy. From the viewpoint of an employee, one of the most powerful incentives to attracting good people to an employer is to provide them with ongoing training and learning. Individuals see training as vital to the development and maintenance of employability in an everchanging world.

A recent report by Kearns (2001) has looked at provision of training and learning services for small businesses. The report provides a snapshot of the current situation in terms of products provided, strategies adopted, promotion, and assessment of impact of training and learning services for small business. The report also suggests directions for fostering learning and skill development in small business. Kearns argues that a strategy for learning has the potential to bring significant benefits for small business. A copy of the report is attached in full as Section 3 of this submission.

Opportunities Provided by Vocational Education and Training

Recent reforms to the VET system are aimed at making it more flexible and responsive and meeting the needs of industry. VET currently has a range of options available to meet the training needs of small businesses. Some examples of current initiatives and good practice models, reported by Kearns (2001) and others, include:

- The Certificate III and IV courses in Small Business. These courses are aimed particularly towards assisting women to be competent in small business;
- Another initiative is the Certificate in Rural Operations. The diversified nature of small business means that it has many identifiable market segments. This particular Certificate is aimed at multi-skilling in the rural segment. The multiskilling nature of the training takes into account the seasonal nature of many rural operations;
- Short term "just in time" programs are available to meet the immediate training needs of small businesses. An example of this is NSW TAFE's, TAFE PLUS program that is aimed at providing practical training for small businesses. The added benefit of customised programs such as these is that they can be used as pathways that enable people to progress to formal VET qualifications;
- A good practice model is the Small Business Professional Development Program (SBPD) which operated in Tasmania between 1995-1999. This program provided some useful insights for effective training for small businesses. The SPBD was an integrative approach to providing training to small businesses and revolved around what could be called "collaborative self-help models". These models included

strategies such as building networks and clusters of small firms, mentoring, coaching and other strategies. Strategies such as these are useful as they meet the needs of the small business environment. Kearney (2000) reported the results of this program together with recommendations for the future;

- Projects in place enabling school students to obtain structured workplace learning
 in small business were reported by Turner and Mulraney (2001). One project is
 brokering workplace learning and VET between schools and small enterprises. A
 major aim of the project is to develop partnerships between schools and small
 businesses. In another project, a community has implemented a formal
 memorandum of understanding between local schools, TAFE, and small
 enterprises;
- The availability of group training companies (GTCs), whose role it is to assist small business to participate in VET New Apprenticeship pathways by recruiting and training apprenticeships and placing them with one or more small business employers while apprentices complete their training. According to NCVER (2001), one of the roles of GTCs is to recruit and train apprentices, and then place them with one or more employers while the apprentices complete their training. The GTCs are particularly beneficial to small businesses as the costs are considerably less than if a small business takes on an apprentice in their own right. GTCs have provided considerable support for small businesses as is shown in Table 7 in Section 2, and have achieved very good employment outcomes for apprentices which go through these companies;
- The Australian National Training Authority (ANTA, 2000) is implementing several strategies aimed at the training needs of small business. These strategies are based on market research and analysis that has identified three major employer segments in terms of attitudes towards skill development and learning (high valuers, here and now, and not interested). Analysis revealed that small businesses were over-represented in the 'not interested' category. Subsequently, ANTA has developed and is implementing several strategies aimed at overcoming the indifference of many small businesses to structured training. These strategies are aimed at recognising and validating as legitimate the informal training that takes place in small businesses, and promoting the benefits of skill development in terms of its relationship to business success.

This listing demonstrates that formal VET has the capacity to provide meaningful training for small business, capable of skilling employees to be more productive and hence increasing the success of small businesses.

Small Business Involvement in Formal VET

Drawing on data in Section 2 of this submission, it can be seen that:

- The level of educational attainment, and current participation in education and training by small business employees accords to a greater extent to the VET sector level than to the Higher Education sector level (Tables 1 and 2);
- Small businesses offer less structured training than other sized businesses (Tables 3 and 4);
- Small businesses that do offer training offer them in a wide variety of fields (Table 5);
- Small businesses rely on a wide range of training providers, only 20% of which is TAFE or University (Table 6);
- Approximately one-third of TAFE graduates are employed by small businesses (Table 8). However, small business accounts for about one half of Australian employees.
- The qualification levels of TAFE graduates are broadly similar across small, medium and large enterprises (Tables 9-11);
- Satisfaction with training by TAFE graduates is very similar for graduates employed by small, medium, and large enterprises, with about two thirds of all graduates being satisfied with the training they receive (Tables 12-14).

Future Initiatives and Incentives

Although initiatives are currently available, Kearns (2001) emphasised that more opportunities and initiatives are required to provide a complete learning framework for small business. Kearns also provided a list of strategies to encourage training and learning in small businesses. For example:

- The relatively recent advent of e-learning can be used as a gateway to foster a
 learning culture in small business. This type of learning can be linked to the
 developments of e-commerce so that e-learning becomes an ongoing part of small
 business culture. E-learning can provide much of the short, specific needs courses
 suited to small businesses. However, to do this will require improved linkages
 with the VET system;
- To provide long-term training and skill development in addition to short-term specific needs training. This may involve for example the development of partnerships between the VET sector and small business, and also the development of learning networks of small firms. The SBPD program serves as a good example of developing learning networks and the benefits that they can convey;
- A whole of government approach to help co-ordinate and bring together the diverse range of training options available. Some of this is already happening with

the Government Business Education Networks (GBEN) in place in some states. The aims of these GBEN's are to foster collaboration and partnership;

• The provision of incentives to small firms to undertake training is also an important consideration. One of the apparent key problems facing small firms in the provision of formal training is the cost involved. An example of an incentive scheme that has been used in Australia was the Small Business Training Bonus Scheme in NSW, which was based on a Victorian program. This scheme involved \$500 training vouchers being sent to small firms which could be used for a range of training programs provided by a range of training providers.

References and Annotations

Australian Bureau of Statistics (ABS) 1999 'Small business in Australia'. Catalogue no. 1321.0, Canberra.

This Australian Bureau of Statistics catalogue presents a variety of statistics in tabular form on small business in Australia.

Australian Bureau of Statistics (ABS) 2001 'Education and training experience Australia'. Catalogue no. 6278.0, Canberra.

This Australian Bureau of Statistics catalogue presents a variety of statistics in tabular form on education and training experience in Australia.

Australian National Training Authority (ANTA) 2000 'A national marketing strategy for VET: Meeting client needs' ANTA, Brisbane. Available from: http://www.anta.gov.au/dapMeeting.asp

This report was presented to MINCO (ANTA's Ministerial Council) 2000 and presents a national marketing strategy for VET in Australia, having a specific focus on the client. The strategy was based on market research with employers and individuals on values, attitudes, and behaviours towards skill formation and lifelong learning.

Australian National Training Authority (ANTA) 2002 'Annual national report of the Australian Vocational Education and Training System 2001, Volume 3'. ANTA, Brisbane (in print).

This report provides an overview of the performance of Australia's Vocational Education and Training sector in 2001. The report covers eight key performance measures that have a focus on outputs, effectiveness and efficiency.

Gibb, J 1998 'VET and small business'. NCVER, Adelaide.

This report sets out to summarise the major research conducted in Australia since 1990 into vocational education and training (VET) and small business, (which accounts for 51 percent of private sector employees) under six main headings: role of government; approach to training; delivery; information and networking; credibility

and quality of training; and equity. Findings are discussed and further directions for research are offered.

Hawke, G 2000 'Factors influencing active learning in small enterprises'. Working paper 00.13 RCVET, UTS.

This study builds on earlier Australian studies in order to identify a framework that might inform the relationship between education systems and small enterprise. The framework also attempts to identify the sorts of learning small businesses engage in.

Kearney, P 2000 'Size matters: National summative evaluation report of the Small Business Professional Development Best Practice Program 1996-2000'. Office of Vocational Education and Training, Hobart.

This report brings together lessons learned over the life of the Small Business Professional Development Best Practice Programme. It distils critical issues into key recommendations for policy and strategic developments

Kearns, P 2001 'Are two worlds colliding? The provision of training and learning services for small business'. Peter Kearns & Associates.

This study examines the promotion of training for small business, the types of training products currently available to small business, and a summary of recent initiatives by stakeholders regarding the provision of training. The study also proposes ten key policy directions for fostering learning and training in small businesses.

Kilpatrick, S, & Crowley, S 1999 'Learning and training: Enhancing small business success'. NCVER. Adelaide.

This report addresses some of the issues surrounding small business participation in training and other learning activities, and the relationship between participation and business success.

National Centre for Vocational Education Research 1998 'Research at a glance: Small business and vocational education and training'. NCVER, Adelaide.

This publication explores the findings and outcomes of research in vocational education and training (VET) as it relates to small business and its attitudes to training, training needs and paths to involvement in training.

National Centre for Vocational Education Research 2001 'Research at a glance: Group training apprenticeships and traineeships'. NCVER, Adelaide.

This publication looks at the development of group training, examines briefly recent growth in group training, employer size, the occupational base, the structure of group training, characteristics of group training apprentices and trainees, the location of group training apprentices and trainees, and off-the-job training undertaken. In addition, it also looks at completion and attrition rates and outcomes from group training of apprentices and trainees.

Toner, P 2001 'Group training companies in Australia: results of a telephone survey'. Draft executive summary. Employment Studies Centre, University of Newcastle Available at: http://www.anta.gov.au/publication.asp?qsID=249

The purpose of this preliminary report is to summarise the findings of a telephone survey of 131 group training companies which was conducted in late September 2001.

Turner, P & Mulraney, J 2001 'Learning from small enterprise structured work placement' in 2001 AVETRA conference: Research to reality: Putting research to work, Australian Vocational Education and Training Research Association.

This paper reports on research conducted in small enterprises and schools in South Australia and New South Wales. The aim of this research was to ascertain differences and similarities in approach to structured workplace learning and the impact of public policy on establishing effective partnerships between schools and small businesses.

Section 2: Statistics relating to training in small businesses

Information provided in the tables presented for this section of the submission are derived from Australian Bureau of Statistics Catalogue numbers 6278.0 and 1321.0, the NCVER's Student Outcomes Survey and Survey of Employer's views, and Toner (2001).

Table 1: Level of highest educational attainment of wage and salary earners 2001

	Small b	ousiness	Other/no		
	Total '000	%	Total '000	%	Tota1 '000
Bachelor degree or higher	207.9	12.2	1340.7	24.2	1548.6
Certificate/Diploma/Advanced Diploma	466.3	27.3	1419.4	25.6	1885.7
Year 12 or below	1015.8	59.5	2714.7	49.1	3730.5
Level not determined	17.0	1.0	59.4	1.1	76.4
Total	1707.0	100	5534.2	100	7241.2

Source: Australian Bureau of Statistics 2001 Catalogue 6278.0

The most significant feature of Table 1 is that the proportion of small business employees that have bachelor or higher level degrees is only about half that for other business (12.2% for small business as compared to 24.2% for other businesses). In addition, the proportion of small business employees that do not have post school qualifications is somewhat higher than for other business (59.5% as compared to 49.1%).

Table 2: Wage or salary earners who studied during 2001

	small b	ousiness	other/no		
	Total '000	%	Total '000	%	Tota1 '000
Bachelor degree or higher	101.4	28.9	468.3	42.7	569.7
Certificate/Diploma/Advanced Diploma	170.8	48.7	437.9	39.9	608.7
Year 12 or below	70.7	20.2	163.5	14.9	234.2
Level not determined	7.7	2.2	27.1	2.5	34.8
Total	350.6	100	1096.8	100	1447.4

Source: Australian Bureau of Statistics 2001 Catalogue 6278.0

Table 2 shows that the proportion of small business employees who were in 2001 studying for a bachelor degree or higher is somewhat less that that for other business (28.9% of small business employees as compared to 42.7% other employees). The

proportion of small business employees who were studying for school or certificate/diploma/advanced diploma was however somewhat higher than for other employees.

Table 3: Participation in training for wage and salary earners: 2001

	Attended a training course in last 12 months %	Total no. of training hours completed '000
Small business	32.1	15983.8
Other	60.4	115216.1
Not known	42.1	12249.9

Source: Australian Bureau of Statistics 2001 Catalogue 6278.0

Table 3 shows that the percentage of small business employees who had attended a training course was significantly less than for other businesses. The total number of training hours completed was also far less for small businesses.

Table 4: Training methods used for those businesses (a) offering training (b) - 1997/98

	Structured training course %	On-the-job training %	Seminars, workshops, conferences etc. %	Job rotation etc. %
Small business	38	75	44	17
Other business	70	95	70	52
Total	41	77	47	21

(a) Excludes agriculture, forestry and fishing, electricity, gas and water supply, communication services, education and health and community services industries.

(b) Only 57% of all businesses offered some form of training (55% of smaller businesses and 90% of larger businesses).

Source: Australian Bureau of Statistics 1999 Catalogue 1321.0

For those small businesses which offered training, table 4 shows that the most prevalent form of training offered was on-the-job training (75% offered this). The least prevalent was job rotation (17% offered this). For all four training methods identified in table 4, other businesses offered them to a far greater degree than did small businesses. For all businesses, job rotation was the training method least offered (21%) and on-the-job training the most offered (77%).

Table 5: Proportion of businesses^(a) offering particular fields of training - 1997/98

	Manage- ment training %	Professional training %	Training for computer specialists %	Trade & apprentice-ship training %	Health and safety training %	Other training
Small business	22	17	18	18	20	35
Other business	50	37	48	40	50	61
All business	25	19	21	20	23	38

(a) Excludes agriculture, forestry and fishing, electricity, gas and water supply, communication services, education and health and community services industries. Source: Australian Bureau of Statistics 1999 Catalogue 1321.0

As with table 4, the statistics shown in table 5 relate only to those businesses that trained staff. Table 5 shows that for all fields of training identified, other businesses offered them to a far greater degree than did small businesses. The most prevalent field of training offered for small business was 'other' training (35%), with the second most prevalent being management training (22%). For all businesses, 'other' was the field of training most often offered (38%), and professional training the leat often offered (19%).

Table 6: Proportion of businesses^(a) using particular training providers – 1997/98

	Employees or owners of the business %	Profession- al associations %	Industry associat- ions %	Equip- ment manu- facturer %	Private training consultant %	TAFE or University %
Small business	72	19	24	22	10	20
Other business	91	48	49	44	35	46
All business	74	22	26	24	13	22

(a) Excludes agriculture, forestry and fishing, electricity, gas and water supply, communication services, education and health and community services

industries.

Source: Australian Bureau of Statistics 1999 Catalogue 1321.0

Once again, the data in Table 6 refers only to those businesses that offered training. Table 6 shows that proportion of small businesses using training providers is less than other businesses for all six types of training providers identified. However, the type of training provider small businesses were most likely to use were employees or owners of the business, and the least likely private training consultants. Formal education (TAFE or University) was used by 20% of small businesses. For all businesses, employees or owners of the business were the training provider most often used (74%), and private training consultants the least often provider used (13%).

Table 7: Average firm sizes of host employers serviced by Group Training companies $^{(a)}$ – 2001

Firm size- number of employees	Percentage of GTC's servicing
1–5	35
6–20	22
21–50	12
51–100	6
100+	8

(a) The findings are based on a sample of 131 Group Training Companies surveyed during September 2001

Source: Toner 2001

Table 7 indicates that the majority of host employers serviced by GTC's are smaller companies (between 1 and 20 employees).

Table 8: Employed TAFE graduates by firm size 1999-2001

	19	1999		00	2001		
Firm size	No. of students	% of total	No. of students	% of total	No. of students	% of total	
Small (<20)	13466	34.4	31250	33.6	30299	34.0	
Medium (20–99)	5637	14.4	13624	14.6	12703	14.2	
Large (100+)	20079	51.2	48122	51.8	46191	51.8	
Total	39182	100.0	92996	100.0	89193	100.0	

Source: NCVER Student Outcome Survey data

Table 8 shows the destination of TAFE students by firm size six months after the completion of their training. The proportions are consistent over the three years, with about a third of TAFE graduates going into small business. Approximately half of TAFE graduates go on to large enterprises.

Table 9: Qualification levels of TAFE graduates by firm size - 2001

		Small business (<20)		Medium business (20-99)		Large business (>100)		Total	
Qualification level	No. of students	% of total	No. of students	% of total	No. of students	% of total	No. of students	% of total	
Diploma and above	5070	17	2229	18	9413	20	16711	19	
AQF Certificate IV and equivalent	3797	13	1943	15	8909	19	14649	16	
AQF Certificate III and equivalent	12309	41	4685	37	13072	28	30066	34	
AQF Certificate I and II	8405	28	3606	28	14180	31	26192	29	
Other certificates	719	2	240	2	617	1	1576	2	
Total	30299	100	12703	100	46191	100	89193	100	

Source: NCVER Student Outcome Survey data

Table 10: Qualification levels of TAFE graduates by firm size - 2000

	Small business (<20)		Medium business (20-99)		Large business (>100)		Total	
Qualification level	No. of students	% of total	No. of students	% of total	No. of students	% of total	No. of students	% of total
Diploma and above	5030	16	2466	18	8853	18	16349	18
AQF Certificate IV and equivalent	4040	13	1967	14	9251	19	15258	16
AQF Certificate III and equivalent	12125	39	5205	38	13765	29	31095	33
AQF Certificate I and II	7858	25	3240	24	13901	29	24998	27
Other certificates	2195	7	746	5	2352	5	5294	6
Total	31249	100	13624	100	48122	100	92994	100

Source: NCVER Student Outcome Survey data

Table 11: Qualification levels of TAFE graduates by firm size - 1999

	7.0 7.0	mall business (20-99) Large business (>100)			Total			
Qualification level	No. of students	% of total	No. of students	% of total	No. of students	% of total	No. of students	% of total
Diploma and above	4214	32	1839	33	6304	32	12357	32
AQF Certificate IV and equivalent	4865	37	2146	39	7655	39	14666	38
AQF Certificate III and equivalent1	1972	15	761	14	2815	14	5548	14
AQF Certificate I and II	1453	11	536	10	2075	10	4064	11
Other certificates	465	4	192	3	712	4	1369	4
Statement of attainment	209	2	74	1	257	1	540	1
Total	13178	100	5548	100	19818	100	38544	100

Source: NCVER Student Outcome Survey data

Tables 9-11 show that the distribution of VET level qualifications across the three firm sizes is not markedly different. Nevertheless, there is a slightly higher proportion of Certificate level III qualifications, and a slightly lower proportion of Certificate IV and above qualifications for small business as compared to medium and large business. The overall distributions for the 2000 and 2001 survey are broadly similar, however, the overall distributions for the 1999 survey are significantly different, with a greater proportion of graduates completing Certificate Level IV qualifications and above in 1999 than for 2000 and 2001.

Table 12: Graduate satisfaction with training according to destination firm size - 2001

	Satisfied		Dissatisfied		Neither satisfied nor dissatisfied		Total	
Firm size	No. of students	% of total	No. of students	% of total	No. of students	% of total	No. of students	% of total
Small business (<20 employees)	20387	69	591	2	8495	29	29473	100
Medium business (20-99 employees)	8387	68	273	2	3702	30	12362	100
Large business (>100 employees)	30149	68	923	2	13548	30	44620	100
Total	58922	68	1788	2	25745	30	86456	100

Source: NCVER Student Outcome Survey data

Table 13: Graduate satisfaction with training according to destination firm size - 2000

	Satisfied D		Dissat	Dissatisfied		Neither satisfied nor dissatisfied		Total	
Firm size	No. of students	% of total	No. of students	% of total	No. of students	% of total	No. of students	% of total	
Small business (<20 employees)	20469	68	631	2	9157	30	30258	100	
Medium business (20-99 employees)	8722	66	281	2	4225	32	13228	100	
Large business (>100 employees)	31214	67	1119	2	14229	31	46562	100	
Total	60405	67	2031	2	27611	31	90047	100	

Source: NCVER Student Outcome Survey data

Table 14: Graduate satisfaction with training according to destination firm size - 1999

	Satisfied		Dissatisfied		Neither satisfied nor dissatisfied		Total	
Firm size	No. of students	% of total	No. of students	% of total	No. of students	% of total	No. of students	% of total
Small business (<20 employees)	8332	64	303	2	4422	34	13057	100
Medium business (20-99 employees)	3399	62	100	2	1958	36	5457	100
Large business (>100 employees)	11744	61	401	2	7202	37	19347	100
Total	23475	62	804	2	13582	36	37861	100

Source: NCVER Student Outcome Survey data

Tables 12-14 show that graduate satisfaction with training is very similar for graduates employed by small, medium and large enterprises, and across the three years 1999-2001. In summary, about two thirds of TAFE graduates were satisfied with the training that they received, only 2% were dissatisfied, and about a third were

neither satisfied nor dissatisfied. Overall, the majority of TAFE graduates were satisfied with the training they received.

Table 15: Employers with recent VET graduates: Attitudes to vocational education and training and overall satisfaction with vocational education and training providers, by employer size, 2001.

	Size of business				
	Small	Medium	Large	Overall	
Attitude statements about VET	Percentage who agreed with the statemen				
Training pays for itself through increased worker productivity	71	78	81	74	
The VET system is providing graduates with skills appropriate to employers' needs	68	69	72	69	
The VET system needs to provide more practical job skills	78	77	73	77	
The VET system does not take into account the needs of employers	33	37	27	33	
There should be more work experience or work placements as part of vocational training	84	87	78	84	
	Percentage satisfied ^(a)				
Overall satisfaction with VET providers	78	81	84	80	

(a) Employers were asked to rate their satisfaction on a scale of 1-10, employers giving ratings of 6-10

Source: NCVER Survey of Employer Views

Table 15 shows that employers across all three business sizes hold positive views of vocational education and training and around eight in ten are satisfied overall. The data also show that small and medium sized employers generally have similar attitudes to each other about vocational education and training and tend to reflect the national figures for the various statements. Large sized employers are more likely to be positive in their attitudes to training and this is reflected in their slightly higher overall satisfaction with training providers.

Section 3: Report by Kearns on the provision of training and learning services for small business