

Learning and Labour Market – South West Wales



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1. MACROECONOMIC INDICATORS

United Kingdom

Recovery in world economic activity has been strong and the near-term prospects are good. At home the UK economy is experiencing the longest period of sustained low inflation since the 1960s. Latest ONS figures show that GDP growth during the second quarter of 2004 averaged 3.7% (annual rate). In the labour market, conditions are tight with unemployment at just 4.8%.

Consumer confidence is high with retail sales to June up 6.9%. However, with the economy now at or close to full capacity, it is widely believed that any further increase in domestic demand is unsustainable and can only result in inflationary pressures. In the year to May 2004 average earnings rose 4.4% while growth in RPI was 3%.

There are particular concerns about levels of consumer debt. A significant proportion of this is linked to inflation in the housing market, which accelerated during 2002 and again in 2004. Fears about inflationary pressures and a speculative bubble in the housing market has prompted the Monetary Policy Committee to raise base rates by 1¼ percentage points (to 4¾ % as of September 2004) since this time last year.

Not all inflationary pressures are within the control of domestic macroeconomic policy and recent increases in crude oil prices to over US \$40/ barrel are potentially damaging to global recovery and economic growth in oil dependent nations. A prolonged hike in energy prices could undermine recent economic progress feeding higher consumer prices and encouraging wage pressures, rising interest rates, and lower output growth.

Wales

There are indications that economic growth in Wales has been less robust than in the UK generally with production and construction output stagnant or falling slightly during 2003. GVA¹ per capita in Wales is just 79% of the UK average, but there is significant intra-regional variation. In West Wales and the Valleys, GVA per capita is two thirds of the UK average while South and East Wales exhibit near parity with the rest of the UK (Table 1). West of Cardiff, only Swansea shows signs of relative improvement in prosperity. Beyond this urban core, relative prosperity has declined further in recent years (Table 2).

¹ GVA or "gross value added" is the term now in use to denote estimates that were previously known as gross domestic product (GDP) at basic prices.

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Table 1: Relative GVA per head: % UK

	1995	1998	2000	2001	2002
England	102	102	103	103	103
Scotland	100	97	95	94	95
Northern Ireland	80	79	79	79	79
Wales	84	80	79	79	79
West Wales & Valleys	74	69	67	67	-
East Wales	101	99	100	100	-

Table 2: GVA per Capita South West Wales; % UK. NUTS 3 Areas

	1995	1998	1999	2000	2001
South West Wales	71	64	63	63	63
Bridgend and Neath Port Talbot	85	81	78	76	75
Swansea	80	80	81	82	83

Source: National Statistics (Crown Copyright)².

Employment

There are approximately 1.3 million jobs in Wales which account for slightly less than 5% of the total for Great Britain. Employment growth in Wales has been higher than the rest of Great Britain since the turn of the millennium, with around 80,000 more people in employment in Wales in 2004. This is an increase of 6.5% on the 2000 total, compared with the 2.3% increase in Great Britain as a whole.

In South West Wales the trend has been slightly above the Welsh average with an increase in employment of 6.7% (17,000 jobs). South West Wales currently accounts for around 20% of Welsh employment (around 270,000 jobs), 72% of which are full-time (Table 3).

Comment [E1]: Source: labour force survey - quarterly: four quarter averages – numerator for employment rate: all people aged 16+

² Many of the data sources referred to in this factsheet (e.g. LFS, NES, ABI) are products provided by National Statistics. Unless otherwise stated, they are within the public domain and can be accessed at <http://www.statistics.gov.uk>

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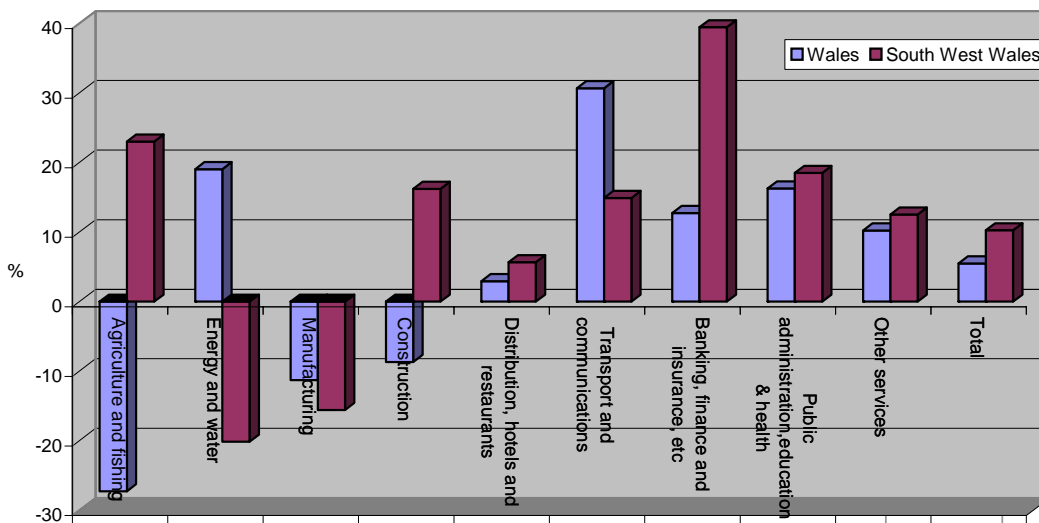
Table 3: Employment in South West Wales, 2003/04

	Total Employment (000)	Jobs full-time (%)
Carmarthenshire	73	77.1
Neath, Port Talbot	49	76.9
Pembrokeshire	51	68.9
Swansea	97	65.6
South West Wales	270	71.4

Source: LFS Quarterly Survey (Sep 2003-Aug 2004)

Between 1998 and 2002, the decline in manufacturing in South West Wales has continued with the loss of over five and a half thousand manufacturing jobs. South West Wales, like the rest of Wales has also benefited from a booming service economy - key contributors being Banking and Finance with 7,200 extra jobs, Distribution Hotels and Restaurants with 2,900 additional jobs and most notably Public Administration, Education and Health where there were over 12,000 were created over the period. The total number of employee jobs in the region increased by over 20,000 equating to a 10% increase on the 1998 total.

Figure 1. Employment change in South West Wales, % change 1998-2002



Source: Annual Business Inquiry³

³ The ABI (Annual Business Inquiry) is unsuitable for evaluating employment trends in farming and consequently, the data in Figure 1 for agricultural and fishing are unlikely to be that meaningful. Readers interested in employment in agriculture and other land-based industries should visit the online websites referenced in the databank section of this publication.

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Other key features of employment trends in South West Wales are summarised below:

- Employment rates in South West Wales are the lowest of the four ELWA regions with just 69.4% of the working age population of the region employed compared to the Welsh average of 72.1%.
- The lower employment rates in South West Wales are particularly notable amongst those in their twenties and early thirties where employment rates are 5% below the Wales and GB rates.
- For the 50+ age group, the employment rate in South West Wales is 30% - 3.5 percentage points less than the all-Wales figure and 7% points less than the GB rate.
- Around 31% of the working age population in South West Wales is qualified to NVQ 3 or higher, compared to 32% in Wales generally. However, only 15.8% of the working age population in South West Wales has attained NVQ level four or above (Wales-17.7%, 21.1% for those of working age in employment).
- The shortfall in qualifications may be reflected in the relative dearth of professional workers in the region, with workers in professional occupations accounting for 9.5% of total employment in the area compared with 11.4% for the Principality as a whole and 12.3% in Great Britain. However, the region has a higher concentration of people in skilled trade jobs (14.6%), (Wales – 13% and GB-11.4%)
- Rates of job related training are also lower in South West Wales with just 12.7% of working age people receiving job related training compared to 14.3% for Wales as a whole. The gap is even more pronounced for men, since just 10.9% of working age men receive job related training compared to 13.2% in Wales as a whole.

Table 4: Qualifications of the working age employed in South West Wales

	South West Wales (%)	Wales (%)	GB (%)
NVQ 4+	15.8	17.7	19.4
NVQ 3	31.7	32.2	33.7
Below NVQ 3	52.5	50.1	46.9
Total	100.0	100.0	100.0

Source: LFS Quarterly Survey (June-August) 2004.

Earnings

Results from the 2003 New Earnings Survey (NES) were presented in the November 2003 Factsheets. These data have not been updated on this occasion as the New Earnings Survey has been discontinued and replaced by the Annual Survey of Hours and Earnings. It is anticipated results from this new survey will be available for reporting in the next update of this factsheet. In the meantime selected data for 2004 are taken from the Labour Force Survey as a means of temporarily updating the earnings data. However it should be noted that LFS data are not strictly comparable with those from the NES.

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The Welsh workforce is among the lowest paid in Britain. In April 2003, average weekly full-time earnings in Wales were £414 compared with £483 for England and £437 for Scotland. It is not just that Wales has more people at the bottom end of the pay distribution, **but it also has fewer at the top end.** In Wales, 21% of full time employees earn less than £250 per week while 31% earn more than £460. The corresponding proportions for England are 16% and 40% respectively. These figures also disguise important differences between genders. In Wales full time women earn on average £357 per week, which is 80% of the corresponding male figure and 89% that of women in England. There are also significant differences between the average wages of different occupations. Based on the SOC 2000 definition workers in professional occupations in Wales have the highest average wages at £625, while sales and customer service occupations earn just £266. In England it is managers and senior officials who have the highest average pay at £759 per week while those who work in personal service occupations have the lowest weekly earnings at £283.

There are also significant pay differences within Wales, with employees in North and South East of Wales on average earning more than their equivalent in Mid and South West Wales (Table 3). For example, in 2003 the average full-time employee in Mid Wales earned £27 per week less than the average Welsh worker and £89 less than the average British worker. In South West Wales, the corresponding pay gap was slightly less at £16 and £78 per week.

Table 5: Average gross weekly earnings in 2003

	Full-time earnings (£ per week)	All Earnings (£ per week)
Mid Wales ⁴	387	307
North Wales	399	326
South East Wales	429	364
South West Wales	398	331
All Wales	414	346
Great Britain	476	395

Source: New Earnings Survey (Workplace basis)

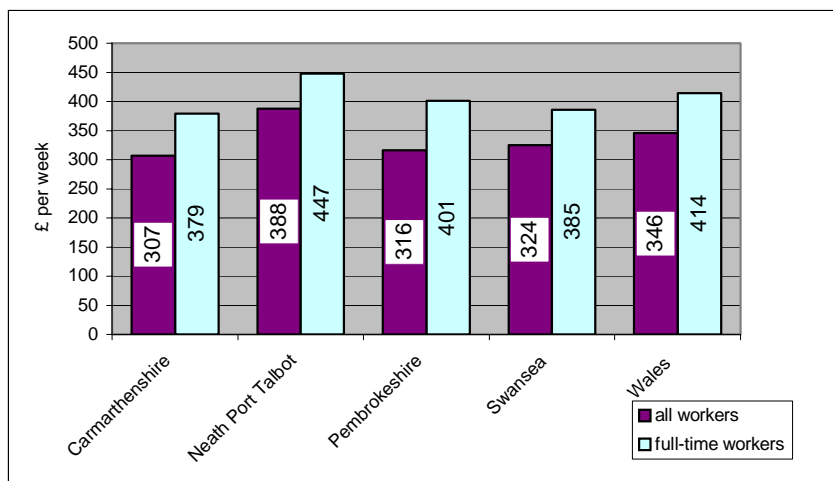
The 2004 data from the LFS (Summer quarter) confirms that average weekly earnings in Wales (£382) remain below the rest of Great Britain (£448), excluding the North East region (£370). Average weekly earnings for men are the lowest of any region at £400, compared to £490 for the whole of Great Britain. For women in Wales the corresponding average is £354 compared to £377 for Great Britain as a whole, but women in Wales do earn more on average than women in the North East, the North West, the East Midlands, the South West and Scotland.

Differences in economic geography and in labour demand are responsible for these spatial variations in pay, which are also evident at the local level. For example, the difference between the average weekly pay of a full time employee in Neath Port Talbot and that of a worker in Swansea comes to more than £60. In fact in only 1 of the 4 unitary authority areas in South West Wales, namely Neath and Port Talbot are earnings greater than the Welsh average (Figure 2).

⁴ Unless otherwise stated, Welsh regions are defined as ELWa regions. This means that Meirionnydd in Gwynedd is included within the Mid Wales region.

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Figure 2. Average gross weekly earnings in South West Wales, 2003



Source: New Earnings Survey (Workplace basis)

2. LABOUR DEMAND

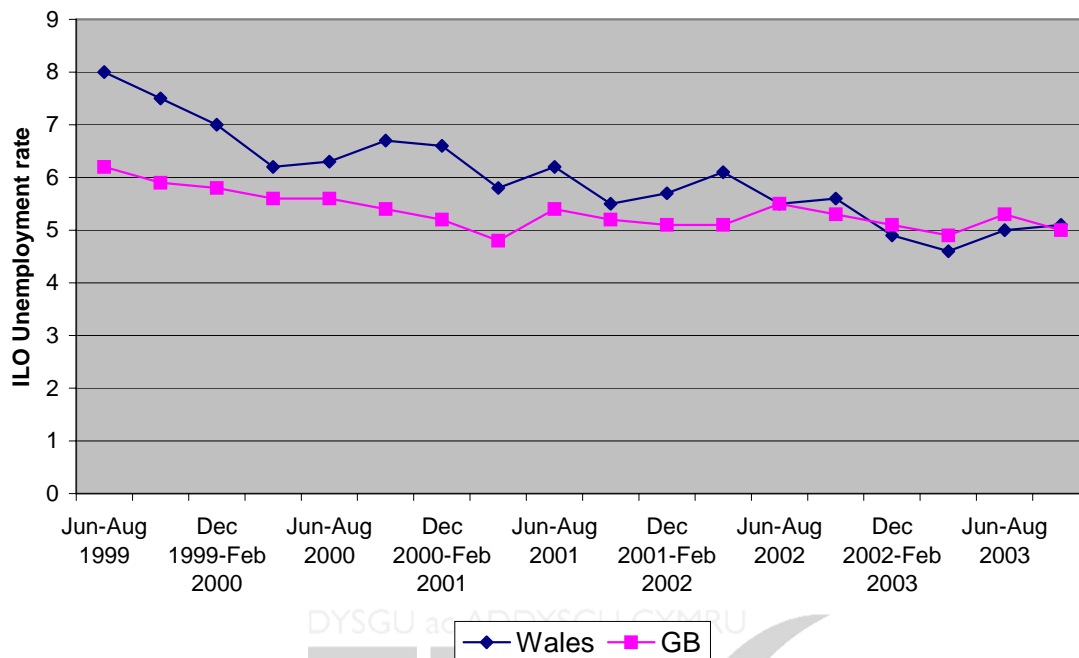
Since 1999 unemployment in Wales has been falling more rapidly than in the rest of Britain and the unemployment rate gap, which previously existed between Britain and Wales, has been eliminated. In fact, Welsh unemployment (ILO basis) in the Autumn quarter of 2003 was just 5% of the working age population and marginally higher than the Great Britain average (Figure 3). However, if the density of jobs is considered (ratio of jobs to working age population), Wales has a lower density (0.73) than either England (0.84) or Scotland (0.82).

The rate of unemployment does vary considerably by age. Between September 2003-August 2004 the unemployment rate for young people (16-24) was 12.3%, about four times the rate for those aged 25-49 (3.3%) and those aged above 50 (2.9%). A similar distribution is also observed for England and Scotland.

The Future Skills Wales Survey was undertaken in 2003 and some of what is reported below replicates information given in an earlier factsheet. However, this section has been supplemented with additional data, particularly at the unitary authority level. The Future Skills Wales 2003 project finds that the proportion of employers reporting hard-to-fill vacancies has more than halved since 1998 and currently stands at 14%. Yet this figure lies above that for England at 7%. The main

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Figure 3. ILO unemployment in Wales and Great Britain.



Source: QLFS, Nomis. Data from June 1999 to November 2003.

cause of hard to fill vacancies was that applicants lacked the suitable skills required (25% of establishments). The main consequence of these hard to fill vacancies was the loss of business to competitors (16% of establishments). The main response to having hard to fill vacancies was to expand the recruitment channels (40% of establishments). Understanding customer needs, the ability to follow instructions, communication and teamwork are among the skills most required by employers.

In September 2004 the distribution of vacancies notified to job centres varied considerably between England and Wales. Wales has a greater proportion of vacancies in manufacturing (8%), distribution, hotels and catering (26%) and particularly in public administration, education and health (25%). Conversely relative to England, Wales has fewer vacancies in banking and finance (28%).

A shortage of people with the necessary skills or experience is the most common reasons given by employers for "hard to fill" vacancies. However, many employers, especially in North and South West Wales also believe their inability to attract staff is due to unattractive conditions of pay (Table 6).

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Table 6: Hard-to-fill vacancies in Wales, 2003

Percent of hard to fill vacancies attributed to

	% of vacancies hard-to-fill	"lack of relevant skills"	"lack of relevant experience"	"unwilling to work at market rate"	"lack of Qualifications"
North Wales	65	31	27	29	14
Mid Wales	68	32	19	19	14
South East	57	31	24	22	17
South West	69	34	20	29	16

Source: Future Skills Wales, 2003 Survey. (Provisional estimates)

The most common employer response to hard-to-fill vacancies is to widen recruitment channels and to broaden the geography of search. **Only 6% of employers** seem to consider training or personal development as a solution. Yet two thirds of individuals maintain they would like to be involved in some form of learning – particularly recognised, career related learning, while 80% of unemployed people report a desire to participate in learning and work associated skills development.

Table 7: Vacancies by Unitary Authority 2003.

	% of employers reporting vacancies	% of employers reporting hard to fill vacancies	% of employers reporting skills gaps	% of employers providing off the job training in the last 12 months
Carmarthenshire	22	16	26	55
Neath and Port Talbot			15	60
Talbot	20	13		
Pembrokeshire	20	16	19	49
Swansea	23	15	23	55
Wales	22	14	19	53

Source: Future Skills Wales, 2003 Survey.

The unitary authorities within South Wales have vacancy rates very close to the national average (Table 7). There is greater variation in the reporting of skills gaps, which are observed most in Carmarthenshire and off the job training which appears to be undertaken most in Neath and Port Talbot. Just over half of all establishments in Wales have undertaken off the job training in the last year, which is greater than the corresponding figure for England (35%).

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3. LABOUR SUPPLY

Participation

The prosperity of the economy depends upon the ability and willingness of its population to engage in economic activity. In this respect Wales has relatively fewer people who participate in the labour market than elsewhere and this is thought to partly explain its poorer performance in the GDP league. Historically the proportion of the working age population economically active has been lower in Wales than in other regions of the UK.

There are indications that the activity rate gap has narrowed recently. As Table 8 shows, the overall activity rate in Wales has risen over the last four years. However whereas Wales overall has seen more growth in female participation, South West Wales would appear to have experienced stronger growth in the male activity rate.

Table 8. Economic activity rates

Variable	2004	2001	2004	2001	2004	2001
	All Working Age		Working Age Males		Working Age Females	
South West Wales	73.8	70.7	78.7	74	68.7	67.3
Wales	75.7	73.1	79.9	78.2	71.3	67.6
Great Britain	78.7	78.7	83.7	84.2	73.4	73

Source: Nomis

There are substantial activity rate differences across Wales with those in South West being well below the Welsh and British rates. The economically inactive consist of a diverse group – early retired, students and sick or disabled- which varies in its closeness to the labour market. There are high levels of inactivity among social housing residents which may reflect reduced potential residential mobility, neighbourhood effects, and peripheral locations. The increase in female activity rates over time reflects increases in female relative earnings, a reduction in family size and the presence of children, rising educational qualifications and improvement in childcare facilities. For some women the price of childcare is an inhibiting factor. For men the high levels of long-term sickness among those of working age has been the main explanation for the high levels of inactivity. According to census data, the permanent sickness rates for Welsh men aged 16-64 were 2.7% in 1971, 5.0% in 1981, 10.0% in 1991 and 9.2% in 2001, – much higher than in the rest of Britain. Furthermore, Wales has a higher proportion of people with a limiting long-term illness (23.3 per cent) than any other region in the UK. Estimates from the LFS suggest that roughly three-quarters of the inactive are neither seeking work nor want it.

Unemployment

Unemployment rates in Wales are currently at historically low levels, with the number of unemployed people, as measured by the claimant count, less than a quarter of the figure two decades ago. In September 2004, around 38,600 people representing 2.2% of the working age population were unemployed. In South West Wales around 8,958 people were unemployed.

Unemployment is a cost to an economy in terms of foregone GDP. However, a question must arise as to the effectiveness of the unutilised labour supply. In this

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respect, claimant based sources of unemployment show that 14% of the unemployed in Wales (11% in South West Wales) have been without work for at least a year, whilst, around 28% of the unemployed in South West Wales have been unemployed for more than six months, compared to 30% in Wales overall.

However, 42% of the unemployed in Wales are of 'prime age' i.e. aged between 25 and 44 years, while a further 33% are young people (under 25s). Corresponding figures for South West Wales are 41% and 34% respectively.

Population Change

The latest population estimate for Wales was 2,938,000 (mid-2003). Over the last two decades there has been

- a fall in the number of under 16s (as a proportion of the total population a decrease from over 22 per cent to just under 20 per cent).
- a modest rise in those of working age (to nearly 60 per cent).
- a significant rise in those of retirement age (proportion increased from under 19 per cent to over 20 per cent).

Projections produced by the Government Actuary Department indicate that the population of Wales is expected to reach 3 million by around 2009. A particular feature of future labour supply is the ageing population. By 2009, a quarter of the Welsh population is expected to be over 60 years of age. This trend is predicted to continue so that by 2030 around a third of people in Wales will be over 60. At the same time, the number of people under 20 years of age in Wales is expected to fall by around 25,000 by 2009, and is predicted to fall by another 30,000 by 2020. Between these two age groups, the 20-60 years population is expected to grow by 25,000 between now and 2017 after which it will decline steadily.

4. EDUCATIONAL FLOWS

Education

In 2002/03, of those individuals aged 17 at the start of the academic year in Wales and who entered two or more A/AS levels or vocational equivalent:

- 68% achieved two or more A levels grade A to C or equivalent, 2% higher than in 2001/02
- 94% achieved two or more A levels grade A to E or equivalent, the same as in 2001/02

For all ages,

- 96% of A level entries were graded A-E, with 72% at grade A-C

There were 1,625 people aged 17 who entered two or more A/AS levels or achieved vocational equivalent in South West Wales – this was 17% of the total across Wales.

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Table 9: Pupils ages 17 at the start of the academic year, 2002/03, by Local Education Authority^(a)

maintained schools in...	percentage of pupils entering two or more A/AS levels or achieved vocational equivalent who...			
	number of pupils entering two or more A/AS levels or achieved vocational equivalent	achieved two or more A/AS levels grade A-C or vocational equivalent	achieved two or more A/AS levels grade A-E or vocational equivalent	average points score per pupil entering two or more A/AS levels or achieved vocational equivalent
Pembrokeshire	490	69	95	21
Carmarthenshire	566	71	96	20
Swansea	472	66	92	20
Neath Port Talbot	97	81	98	23
Wales^(b)	9,848	68	94	20

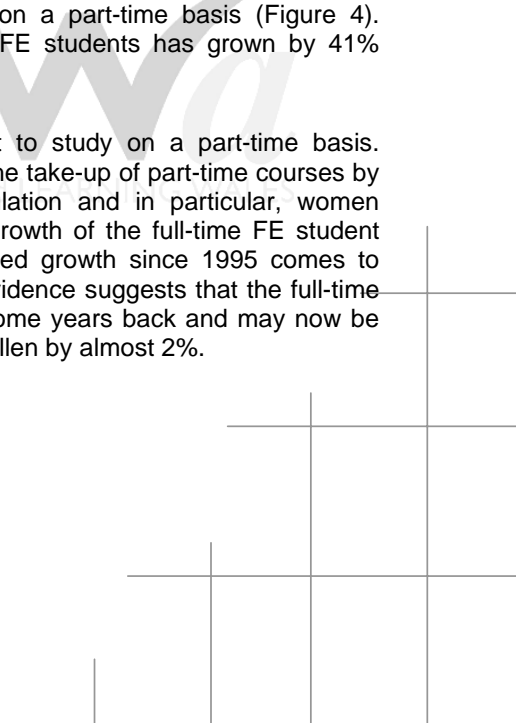
(a) Includes all A levels, A2 levels, and Advanced Vocational Certificates of Education (AVCE)

(b) Includes independent schools, but excludes further education institutions.

Source: Statistical Directorate, NAFW, November 2003

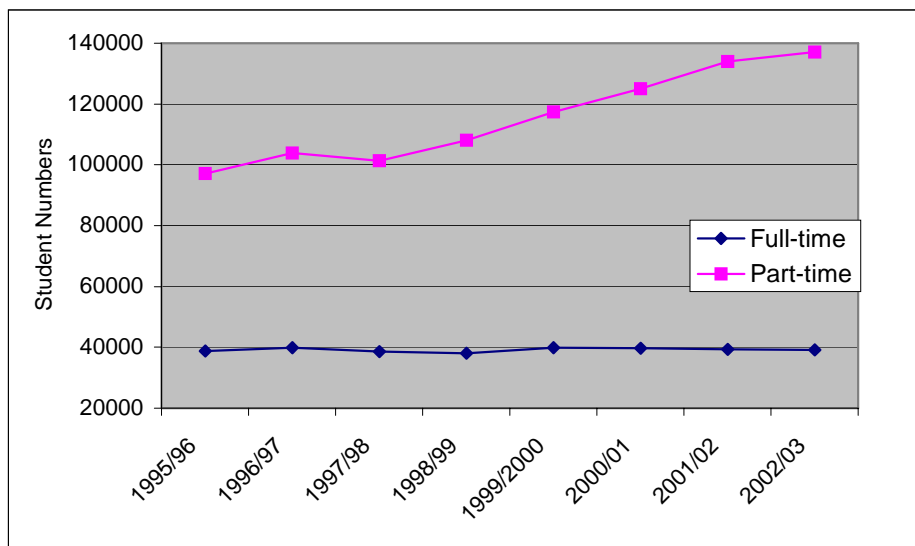
More than 4 out of 5 school leavers either stay in full time education or enter work based training. Since 1995/96, the total number of further education students in Wales has risen by almost 30% - a trend that has largely been propelled by increasing numbers of people electing to study on a part-time basis (Figure 4). Throughout this period, the number of part-time FE students has grown by 41% increasing the ratio of PT/FT from 2.5 to 3.5.

Over ¾ of the FE student population now elect to study on a part-time basis. Although many of these will be employed people, the take-up of part-time courses by the unemployed, the economically inactive population and in particular, women entering the labour market are also important. Growth of the full-time FE student population has been far more restrained. Recorded growth since 1995 comes to 1.1% but the figure is somewhat deceiving. The evidence suggests that the full-time student population may have reached a plateau some years back and may now be declining slightly. Since 1999, the numbers have fallen by almost 2%.



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Figure 4: FE student numbers at FE and HE institutions in Wales



Source: ELWa

There are 5 FE institutions in South West Wales with a combined student population of just over 59,000 - 23% of the FE sector in Wales (Figure 5). Swansea, Neath Port Talbot and Coleg Sir Gar are the 3 biggest colleges accounting for ¾ of all FE students in the region. In all five institutions the number of part-time students exceed the full-time population, though this varies by institution. The average ratio of PT/FT for the region is around 4½ :1 and just slightly lower than the all-Wales average of 5:1⁵ (Table 10).

Table 10: South West Wales FE institutions 2002/03: Market shares and PT/FT student ratios.

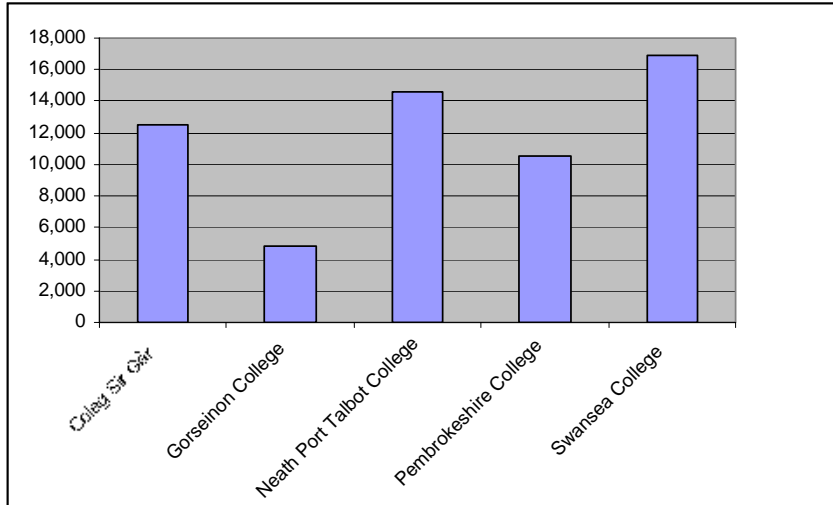
Institution	Student Shares %	Ratio PT/FT
Coleg Sir Gâr	21	4.5
Gorseinon College	8	1.4
Neath Port Talbot College	25	3.5
Pembrokeshire College	18	5.9
Swansea College	28	7.5
All South West Wales	100	4.4

Source: ELWa

⁵ There is a discrepancy between this ratio and the all-Wales figure of 3.5 given earlier. This is due to the use of different sources. The smaller figure is derived from a count of the number of students registered during a given week in the Autumn term (the Census week) whereas the larger number is obtained from the student count for the whole year.

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Figure 5: FE student numbers 2002/03: South West Wales.



Source: ELWa

Table 11 provides a summary analysis of the age profile, mode of learning and gender of students enrolling at FE colleges in South West Wales. It shows that students enrolled onto full-time courses are distributed roughly equally between males and females. However, the more flexible modes of study would seem to appeal more to women which account for 59% of the combined enrolment onto part-time day studies, evening classes and distance / open learning.

Table 11: FE students enrolled at FE Institutions in South West Wales by age, mode and gender, 2002/03

Age analysis	Full-time / Sandwich	Part-time day	Evening only	Other	Open & Distance Learning	Unknown	All modes
18 and under	8,703	2,548	493	0	586	362	12,692
19-20	750	1,259	320	0	323	116	2,768
21-24	474	2,117	877	0	636	140	4,244
25-39	727	8,533	3,448	0	2,961	317	15,986
40-59	284	9,999	4,253	3	2,662	369	17,570
60+	18	4,313	1,032	0	244	41	5,648
Unknown	17	269	83	0	79	4	452
Total	10,973	29,038	10,506	3	7,491	1,349	59,360
Of whom,							
Males	5,457	11,769	3,907	0	3,530	693	25,356
Females	5,516	17,269	6,599	3	3,961	656	34,004

Source: ELWa

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It would also seem that a greater proportion of mature adults are opting for the more flexible study routes. For instance, 79% of the full-time student population are aged 18 or less while across all modes of study the corresponding proportion is just 21%. Almost one half (48%) of those students pursuing part-time day courses, evening classes or open / distance learning are aged 40 years or over compared to just 3% of full-time students who are in this age group.

Adult Continuing Education (ACE)

The table below shows the participation in adult and continuing education (ACE) in South West Wales and Wales in December 2002. Readers should note that **the census return on which the ACE data are based has since been discontinued and at this point in time we are unable to provide more recent data.**

With 22% of the total number of ACE enrolments in Wales, the South West's share is in line with its size, also accounting for 22% of the adult population of Wales.

Table 12: All Wales and South West Wales Adult and Continuing Education participation (number of learners in week 1 December 2002)

Adult Continuing Education	Wales	South West Wales
Maintained provision	15,115	4,517
Contracted out	3,457	0
Assisted	5,120	0
Contracted in (included under FE)	26,136	6,367
Total Adult Continuing Education	49,828	10,884
ACE individual enrolments	55,710	12,072

Source: ELWa

5. QUALIFICATIONS

Globalisation and advances in technology have appreciably reduced the need for unskilled labour and it is abundantly clear that **those without formal qualifications are distinctly disadvantaged in the labour market.** The capacity of the population, and even more so the labour force, to adapt to economic shocks and shifting employment opportunities depends on their willingness to learn and to accumulate new skills. Increasingly these skills can only be acquired through formal training.

Aims

Table 13 shows the subject areas elected by students enrolled at FE institutions in South West Wales during 2002/03. The two most popular subjects, which collectively accounted for a third of qualification aims were IT (18%) and Care (16%). There is no evidence of a particular regional bias in student preferences or levels of provision in the South West region - the distribution of students by subject is remarkably similar to the all-Wales average. Furthermore, in an economy, which increasingly requires administrative and IT skills and more care workers and health personnel, the subject choices displayed by students in the FE sector are quite rational. With employment in the production and construction sectors insecure, it should be no surprise that

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individuals are turning away from subjects like the built environment, engineering and manufacturing.

Table 13: Student qualification aims by subject, 2002/03

Subject for each Qualification aim	South West Wales No	South West Wales %	All Wales %
Business and Management	11,834	8	8
Sales/Marketing	2,070	1	1
IT	28,101	18	18
Humanities	4,589	3	2
Social Sciences	1,693	1	1
Cultural Studies	9,785	6	8
Education	6,116	4	4
Care	28,115	18	16
Arts and Crafts	5,513	4	4
Media	8,291	5	6
Performing Arts	2,039	1	1
Sports	3,429	2	1
Hotel and Catering	6,816	4	5
Health	10,407	7	8
Environment	577	0	0
Science/Maths	10,046	7	7
Agriculture	1,601	1	2
Built Environment	3,955	3	3
Services to Industry	1,070	1	0
Manufacturing	2,545	2	1
Engineering	3,921	3	3
Mining/Chemicals	0	0	0
Transport	242	0	0
Not Specified	745	-	-
Total	153,500	100	100

Source: ELWa

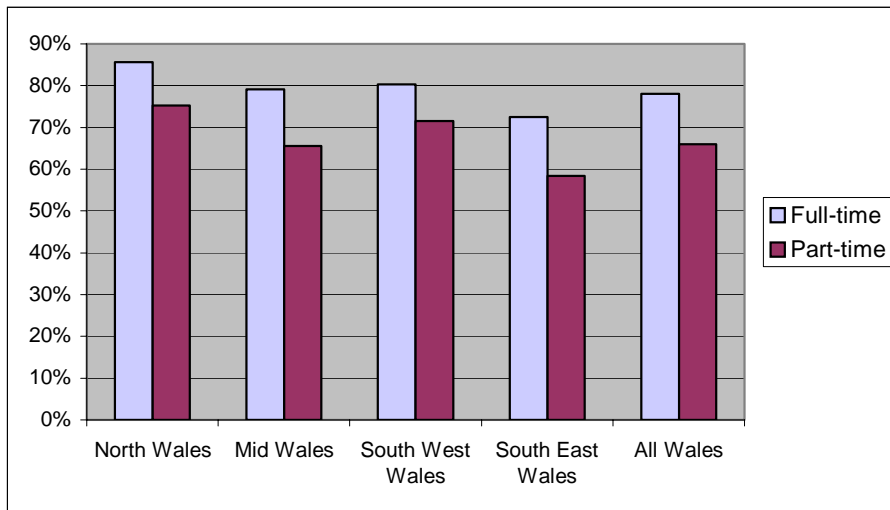
Attainment Rates

Attainment rates measure the number of qualifications fully achieved as a percentage of the qualifications based programmes completed (whether successfully or not). In 2002/03 the average for 'mainstream A qualifications'⁶ came to 78% in South West Wales, slightly more than the all-Wales average of 74%. Differentiating between full and part-time provision, the attainment rate is almost universally higher for full-time students than part-time ones. In the South West Wales region the attainment rates were 80% and 72% respectively. Regional comparisons are shown in Figure 6.

⁶ These include GNVQ, Advanced VCE, NVQ, GCSE, First, National, A/AS Level and Access to HE

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Figure 6: Attainment rates for full and part-time studies – Mainstream A Qualifications, 2002-03



Source: ELWa

Generally lower part-time attainment rates are perhaps not altogether surprising given that those engaged in part-time study differ from the full-time student population. They may be confronted by greater obstacles to learning and may take longer to achieve their qualification aims. However, the effect of mode of study on attainment is less discernable in data for individual FE institutions suggesting that the institutional attainment rate may be a more complex phenomenon (Table 14).

Table 14: Attainment rates by institution; South West Wales 2002/03

	Attainment Rate (FT) (%)	Attainment Rate (PT) (%)
Coleg Sir Gâr	76	71
Gorseinon College	93	54
Neath Port Talbot College	74	76
Pembrokeshire College	74	68
Swansea College	76	75
All South West	80	72

Source: ELWa

Learning and Labour Market - South West Wales

Training

Analysis of training supported by ELWa in South West Wales highlights that during 2003/04 the most prominent programmes were Skillbuild, Modern Apprenticeships and Foundation Modern Apprenticeships (Table 15). In total 7,700 trainees were recruited in South West Wales - 23% of the Wales total. The overall pattern of training in South West Wales was almost identical to that in Wales as a whole.

Table 15: Trainee recruitments, 2003-04

Programme	South West Wales (%)	Wales (%)
Skillbuild	26.6	26.8
Foundation Modern Apprenticeship	30.9	31.2
Modern Apprenticeship	24.7	24.7
Other Youth Programmes	0.0	0.0
MSDA (Modern Skills Diploma for Adults)	2.1	2.7
Adult standard	9.7	9.3
Adult endorsed	5.9	5.3
All	100.0	100.0

Source: ELWa

Local Area Tables

It has not been possible to secure updated data on this occasion. The following tables reproduce summary results for 2000/2001 for ELWa subdivisions of the South West Wales region.

Key outputs include:

- learners by mode of learning
- learners by highest qualifications aim level
- qualification attained by qualification level
- qualification attained by subject

The information in the tables relates to all FE level students and work-based learners who were either enrolled at a Welsh FE institution or who were funded by ELWa through a private training provider. The number of learners is the number of individual learners in learning within the relevant year. Every attempt has been made to remove duplications from the figures so that an individual learner is only counted once. Where a learner is engaged in study or training towards more than one qualification in the year, only the highest level qualification is counted. Values lower than 5 have been replaced with a *.

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2000-2001	Learners by Mode of Learning			Learners by Highest Qualification Aim Level																			
	FT	PT	WBL	NVQ Level 4+	Key Skills Level 4+	NVQ Level 3	BTEC National Qualification	GNVQ Advanced	Advanced VCE	GCE A/AS Level	Key Skills Level 3	OCN Unit(s)	NVQ Level 2	BTEC first qualification	GNVQ intermediate	GCSE	Key Skills Level 2	NVQ Level 1	GNVQ foundation	Key Skills Level 1	SLDD course	Other	Not known
Pembrokeshire	1,443	6,562	1,823	61	0	977	159	219	94	220	37	2,180	1,063	8	5	112	14	127	0	30	96	3,745	681
Carmarthenshire	2,659	10,324	2,585	109	0	1,098	454	291	134	848	72	2,265	2,317	46	113	314	102	307	*	58	203	5,785	1,048
Swansea	3,560	12,955	3,197	64	0	1,189	605	598	67	1,301	201	3,405	1,942	31	116	612	94	314	36	92	376	7,220	1,449
Neath Port Talbot	2,677	8,038	2,410	40	0	810	489	355	34	1,026	132	3,688	1,389	11	69	190	32	166	*	17	257	3,476	943
South West Wales	10,339	37,879	10,015	274	0	4,074	1,707	1,463	329	3,395	442	11,538	6,711	96	303	1,228	242	914	36	197	932	20,226	4,121

2000-2001	Number of Qualifications Attained by Qualification Level																					
	NVQ Level 4+	Key Skills Level 4+	NVQ Level 3	BTEC National Qualification	GNVQ Advanced	Advanced VCE	GCE A/AS Level	Key Skills Level 3	OCN Unit(s)	NVQ Level 2	BTEC first qualification	GNVQ intermediate	GCSE	Key Skills Level 2	NVQ Level 1	GNVQ foundation	Key Skills Level 1	SLDD course	Other	Not known		
Pembrokeshire	7	0	323	111	406	0	328	62	1,913	465	22	29	130	200	72	0	54	19	3,346	94		
Carmarthenshire	26	0	352	170	211	34	1,586	66	1,163	924	26	75	293	347	183	9	169	57	4,999	106		
Swansea	11	0	468	188	322	59	2,235	307	3,166	1,026	39	130	556	1,696	236	29	515	39	475	5,153	543	
Neath Port Talbot	17	0	350	218	138	63	2,183	72	3,232	839	21	81	325	690	128	15	151	197	3,307	181		
South West Wales	61	0	1,493	687	1,077	156	6,332	507	9,474	3,254	108	315	1,304	2,933	619	53	889	748	16,805	924		

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2000-2001	Number of Qualifications Attained by Subject																							
	Business and Management	Sales/Marketing	IT	Humanities	Social Sciences	Cultural Studies	Education	Care	Arts and Crafts	Media	Performing Arts	Sports	Hotel and Catering	Health	Environment	Science/Maths	Agriculture	Built Environment	Services to Industry	Manufacturing	Engineering	Mining/Chemicals	Transport	Not specified
Pembrokeshire	961	71	1,169	66	80	396	111	1,496	230	176	76	58	887	623	36	252	126	343	83	47	212	0	30	52
Carmarthenshire	1,680	127	1,782	173	236	836	170	739	365	363	137	162	814	1,112	62	688	240	362	88	219	343	*	*	93
Swansea	1,809	292	2,505	289	314	1,222	362	2,665	1,098	913	269	250	789	1,180	109	1,369	141	461	116	307	496	*	18	178
Neath Port Talbot	1,387	167	1,844	383	309	857	962	796	731	330	200	206	489	976	71	901	99	353	134	228	491	13	6	275
South West Wales	5,837	657	7,300	911	939	3,311	1,605	5,696	2,424	1,782	682	676	2,979	3,891	278	3,210	606	1,519	421	801	1,542	13	54	598

South West Wales Learning and Labour Market

6. SUMMARY DATABANK

Key Statistics: UK

Annual % change unless otherwise stated

	2003				2004	
	Q1	Q2	Q3	Q4	Q1	Q2
GDP	1.9	2.2	2.2	2.8	3.4	3.7
Total fixed investment	3.7	2.1	1.2	1.7	5.7	6.3
Manufacturing investment	-1.0	-10.7	-15.0	-3.2	-6.9	1.4
Household consumption	2.3	2.3	2.5	2.2	2.9	3.1

	2003				2004			
	Dec	Jan	Feb	Mar	Apr	May	June	July
Manufacturing output (3 month/ 3 month 1 year ago)	1.7	1.5	1.3	1.1	1.0	1.4	1.6	na
Retail sales (3 month/3 month 1 year ago)	3.3	4.3	5.2	6.4	6.2	6.6	6.7	6.9
Claimant Unemployment (million)	0.93	0.89	0.89	0.88	0.87	0.86	0.85	0.84
Retail price index	2.9	2.6	2.5	2.6	2.5	2.8	3.0	3.0
Average Earnings	3.3	4.7	4.9	5.2	4.3	4.4	4.4	na

Source: CBI Economic Bulletin, September 2004

	2003		2004			
	Sept	Dec	Jan	Mar	June	Sept
Bank of England Base (Repo) rate	3.5	3.75	3.75	4.0	4.5	4.75

Source: Bank of England

Agriculture Data

Omissions to the ABI data render it unreliable for analysis of the land based sector and it is recommended that specialist sources be consulted. For a review of employment and skills issues in the land based sector in Wales and the UK see:

The Sector Skills Council for the Environmental and Land Based Sector
<http://www.lantra.co.uk>

South West Wales Learning and Labour Market

This **Factsheet** is available from the ELWa Website at: <http://www.elwa.org.uk> within the publications section.

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⁷ November factsheets prepared by MGS Economics in association with WELMERC