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Welsh Government

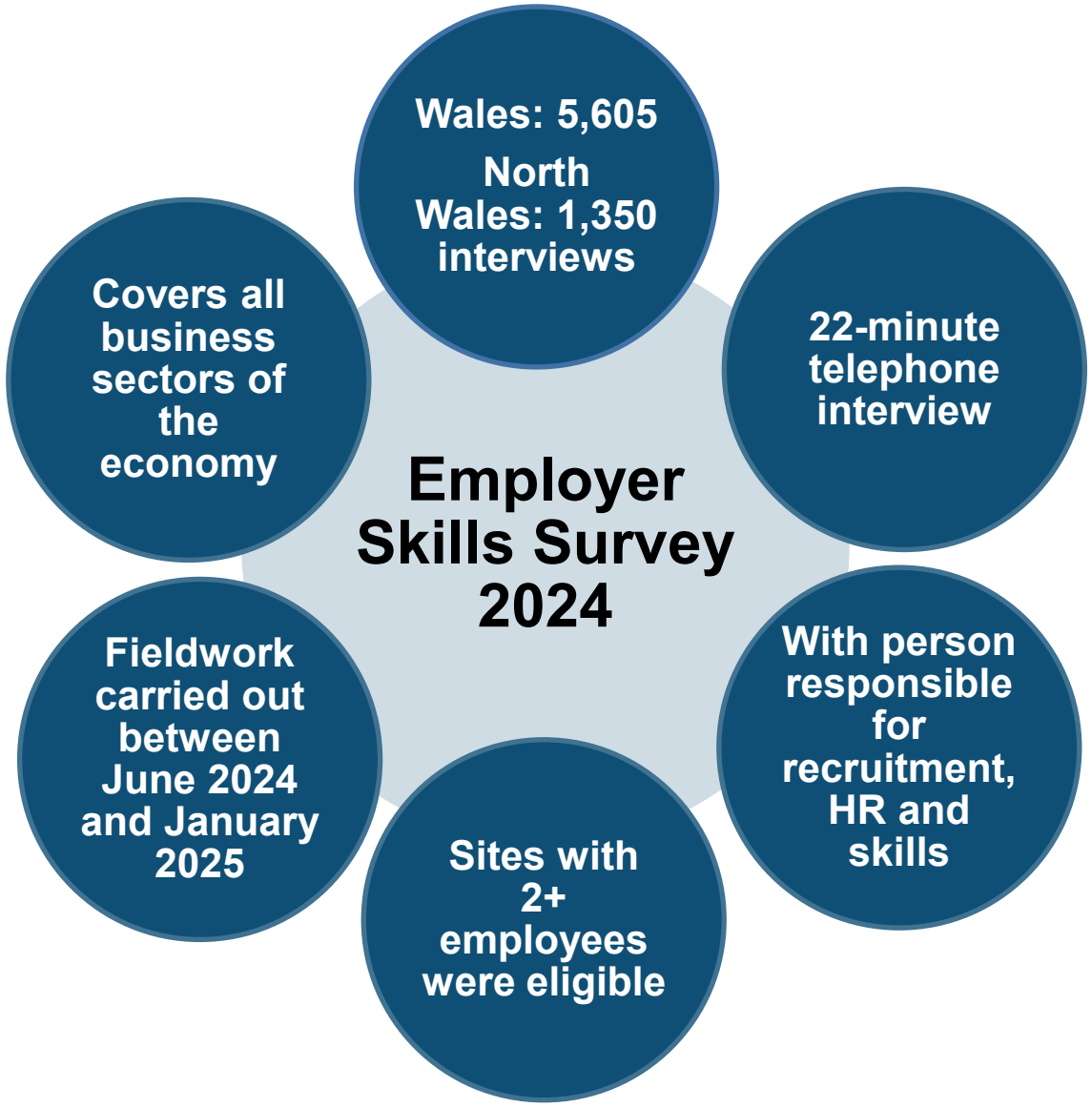
Employer Skills Survey 2024

Core results: North Wales slide pack

Department for Education

IFF Research

Introduction



Slide Pack Information

- The seventh survey in this biennial series
- Includes content which was previously covered in the Employer Perspectives Survey
- This slide pack focuses on the following core areas of the survey:
  - Recruitment and skill-shortage vacancies
  - Skills gaps in the existing workforce
  - Training and workforce development
  - Employer practices: High Performance Working Practices, use of Artificial Intelligence and Net Zero strategies

Further detail – including on other survey areas – is available in the Wales reports and data tables

Methodology

- The population covered by the survey comprised UK employers at the site level (rather than at an organisational level) with at least 2 employees on the payroll. Sole traders with a single person on the payroll were excluded.
- The survey encompassed sites across the whole of the UK, covering all sectors of the economy (the commercial, public and charitable spheres).
- ESS 2024 was the second in the series to use a Random Probability Sampling (RPS) approach, where the sample is processed according to agreed protocols, meaning that sites have an equal and known probability of being sampled.
- Data was collected via Computer-Assisted Telephone Interviewing (CATI). Employers were offered the option to be interviewed in Welsh or English.
- The overall response rate for sites in Wales was 71%, calculated as ‘achieved interviews’ as a proportion of all respondents who were successfully contacted and reached a final outcome (including those who refused, or who quit during the interview). The response rate for Wales was higher than those for the other UK nations, which ranged from 63% to 66%.
- Further detailed technical information is available in the accompanying Technical Report, published on the DfE website.

Reporting conventions

- The terms ‘site’ and ‘employer’ are used interchangeably throughout this report to avoid excessive repetition.
- All comparisons referred to in the slide pack are statistically significant at the 95% level of confidence. This applies to differences between survey subgroups, such as region, size and sector, and also to differences over time. In some places, the highest or lowest subgroups are reported to give an indication of range, however this does not suggest statistical significance.
- Throughout the report unweighted base figures are shown on tables and charts to give an indication of the statistical reliability of the figures. These figures are always based on the number of sites answering a question, as this is the information required to determine statistical reliability.
- In tables, ‘zero’ is denoted as a dash (‘-’); and an asterisk is used (‘*’) if the figure is larger than zero but less than 0.5%. All volume measures have been rounded to the nearest 100.
- Throughout the slide pack, figures with a base size of fewer than 30 sites are not reported (a double asterisk (**) is displayed instead), and figures with a base size of 30 to 49 are denoted by a single asterisk (*) next to the data value and should be treated with caution as the margin of error for these results is larger and therefore the results are less statistically reliable.
- Please note that, unless otherwise stated, all figures presented in this slide pack are taken from responses by employers to the ESS 2024 survey and therefore represent their views.

Questionnaire coverage

Large sections of the ESS survey were modularised to ensure that ESS and EPS legacy questions could be covered without adding significantly to interview length. All employers were asked a set of core questions and one modularised set of questions, after being randomly allocated to a module. The survey structure (in order of how questions were asked to employers) is shown below:

- **Vacancies and skill shortage vacancies**
- Recruitment channels (Module C)
- Recruitment of education leavers (Module C)
- Work placements and work inspiration activities (Module B)
- **Workforce composition and skills gaps**
- **Underutilisation (Module A)**
- Upskilling (Module A)
- **Training and workforce development**
- Investment in Training
- Vocational qualifications (Module B)
- **Apprenticeships (Module A)**
- National Occupational Standards (Module D)
- **High Performance Working Practices (Module D)**
- **Current and future use of AI**
- **Net Zero**

Only the topics in **bold** are covered in this slide pack

Achieved interviews

By nation and region	Population	Number of interviews
Wales	86,800	5,605
North	21,400	1,350
By size (number of employees): North Wales	Population	Number of interviews
2-4	11,700	373
5-24	7,700	683
25-49	1,100	166
50-99	500	89
100+	400	39

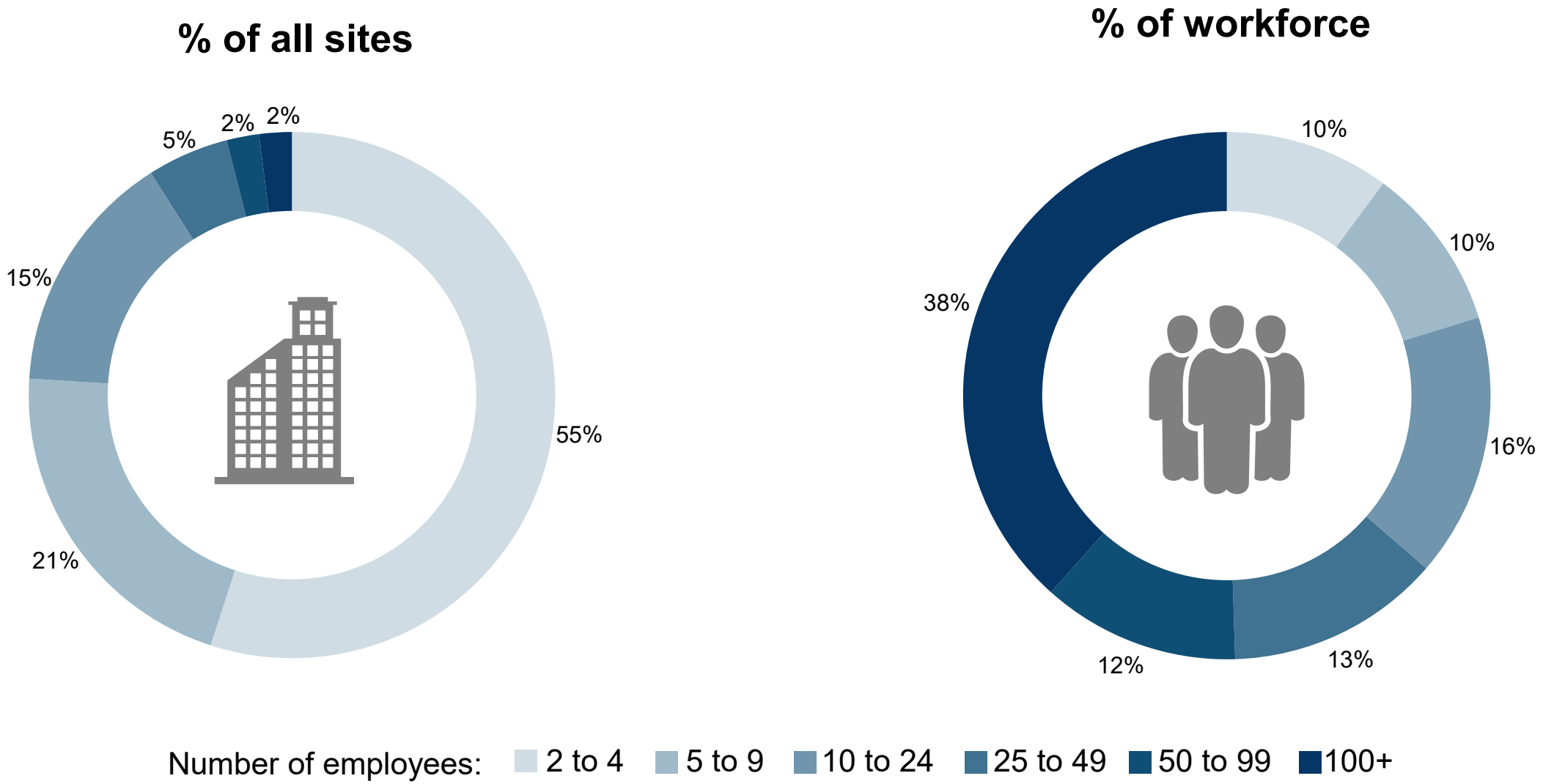
By sector (North Wales)	Population	Number of interviews
Primary Sector & Utilities	2,700	92
Manufacturing	1,100	82
Construction	2,300	102
Wholesale & Retail	3,900	269
Hotels & Restaurants	2,700	138
Transport & Storage	700	37
Information & Communications	400	24
Financial Services	200	18
Business Services	3,200	176
Public Administration	400	30
Education	700	112
Health & Social Work	1,700	178
Arts & Other Services	1,400	92

All the figures presented in this slide pack are subject to a margin of error. At a 95% confidence level, the maximum margin of error is 3 percentage points (p.p.) for North Wales. Within North Wales, for sectors which are in scope for reporting (with a base size of 30 or more), at the 95% confidence level, the margin of error for results based on ‘all sites’ ranges from 6 p.p. for Wholesale & Retail to 18 p.p. for Public Administration.

Due to small base sizes for sub-groups and higher margin of error, care should be taken when comparing sub-group differences over time

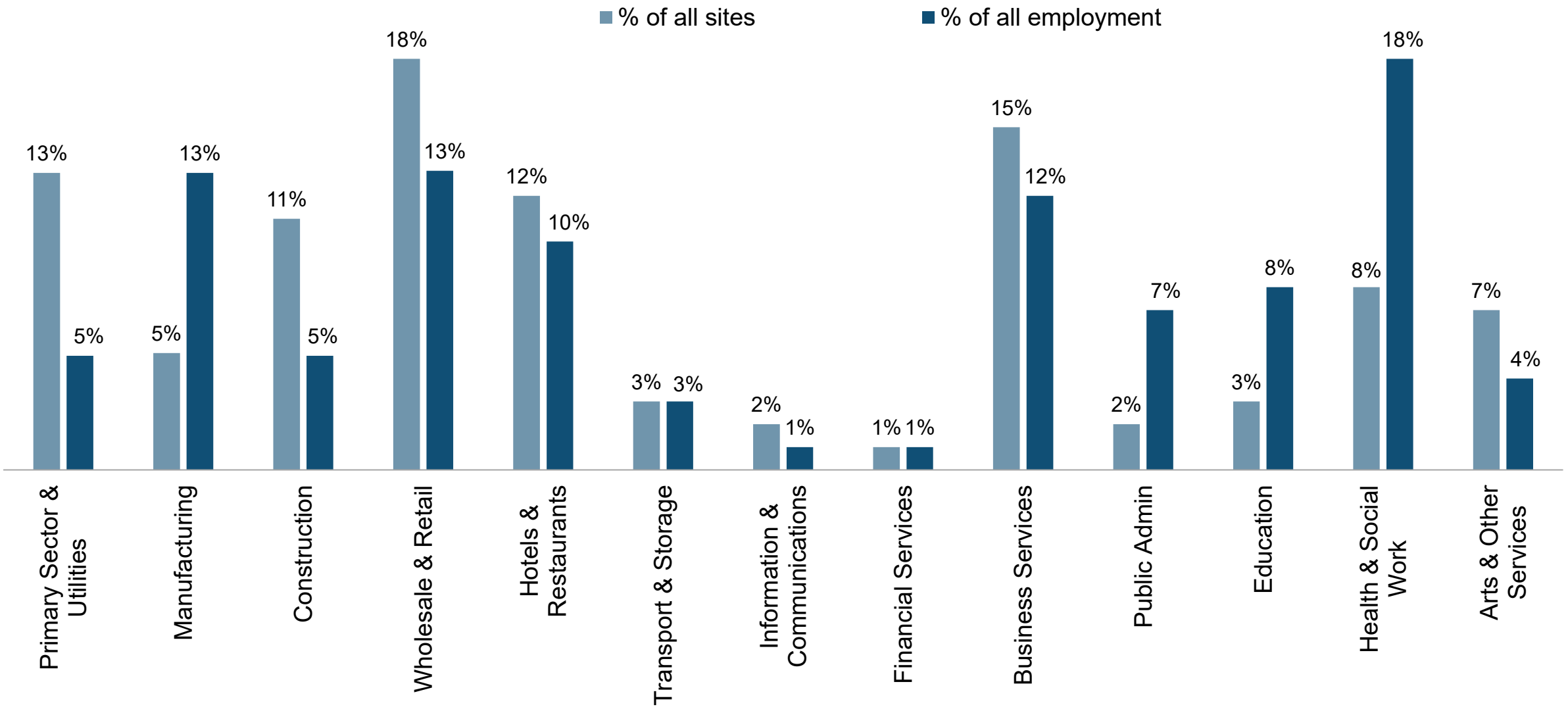
Population counts taken from the ONS Inter-Departmental Business Register (IDBR), and have been rounded to the nearest hundred.

Survey population North Wales: employer size profile by number of employees



Source: ONS Inter-Departmental Business Register (IDBR).

Survey population North Wales: sector



Source: ONS Inter-Departmental Business Register (IDBR)

Key definitions

Site base	Proportions are based on the number of sites, defined here as a single location of an organisation, where at least two people work.
Employment base	Proportions are based on the total number of employees and working proprietors across sites.

	Vacancies	**Skill-shortage vacancies (SSVs)**	**Skills gaps**
Incidence	Proportion of sites reporting at least one vacancy	Proportion of sites reporting at least one skill-shortage vacancy (i.e. vacancies which are reported to be hard-to-fill because applicants lack relevant skills, qualifications or experience)	Proportion of sites with at least one employee deemed by their employer to be not fully proficient in their role
Density	Vacancies as a proportion of all employment	Skill-shortage vacancies as a proportion of all vacancies	The number of staff reported as not fully proficient as a proportion of all employment

Overview

- After an increase in 2022, vacancy levels decreased in 2024 while the challenge around skills supply has lessened slightly. Vacancies fell from the 2022 high, with fewer employers reporting skill-shortage vacancies (SSVs). However, SSVs still made up nearly a third of all vacancies, mainly due to gaps in specialist skills, time management or task prioritisation skills, and problem-solving skills.
- Both the proportion of employers with skills gaps and the density of skills gaps among the workforce remained in line with 2022 levels. The proportion of employers with at least one employee with qualifications or skills more advanced that required for their role was in line with the Wales average.
- The proportion of employers who had arranged or funded training for their staff in the previous 12 months was consistent with 2022 and compared with Wales overall. However, the proportion of staff that received training in the last 12 months was higher than the Wales average.
- Looking at employer practices, a minority in North Wales were considered to be High Performance Working (HPW) employers. Similarly, small proportions of employers reported using Artificial Intelligence (AI) or said they had a Net Zero strategy in place.

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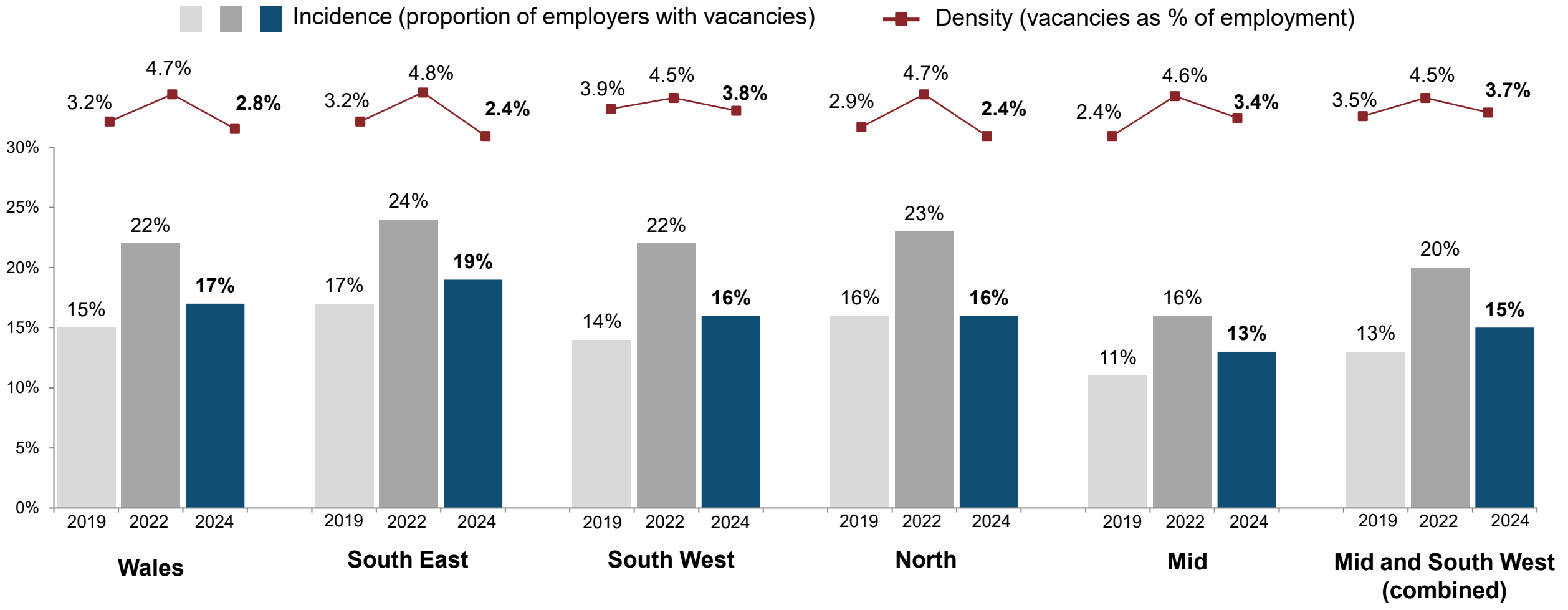
Recruitment and skill-shortage vacancies (SSVs)

Department for Education

IFF Research

Vacancy incidence decreased across each Welsh region, except in Mid Wales, returning to 2019 levels. Vacancy density decreased in South East Wales and North Wales

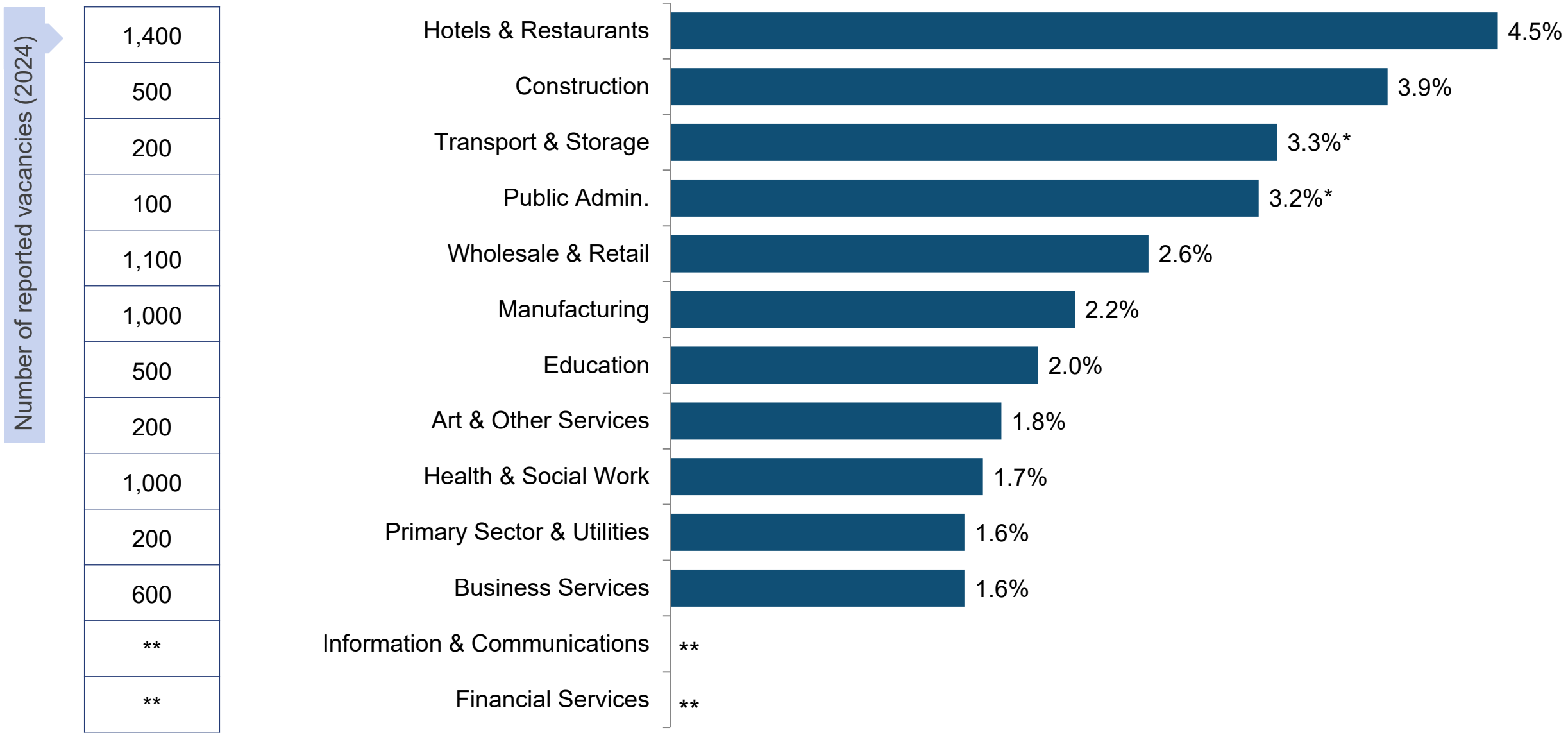


Wales	South East	South West	North	Mid	Mid and South West (combined)
35,700	15,500	10,400	7,000	2,700	13,100

Number of reported vacancies (2024)

Base: All sites in Wales (2024: 5,605; 2022: 4,825; 2019: 6,773). 2024 regional base sizes range from 717 in Mid Wales to 2,310 in South East Wales.

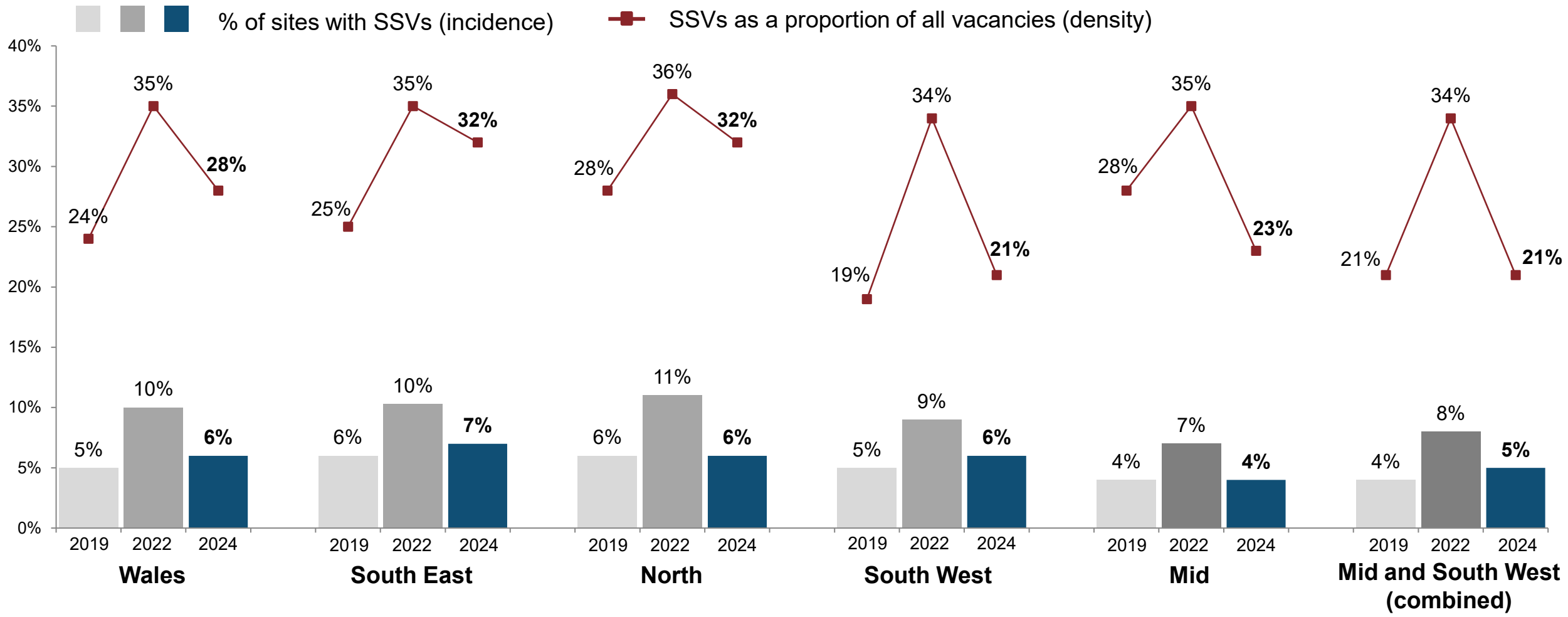
By sector, vacancy density was highest in the Hotels and Restaurants sector



Base: All sites in North Wales (base sizes range from 30 in Public Administration to 269 in Wholesale and Retail).

Where base sizes are between 30 and 49, an asterisk has been included next to the data value. When base sizes are small, volume and density measures at subgroup level can be heavily influenced by a small number of cases. Results should be interpreted with caution. *** note that this difference was not statistically significant and as such should be treated as*

SSV incidence decreased across all regions to levels similar to 2019, and was highest in South East Wales and lowest in Mid Wales



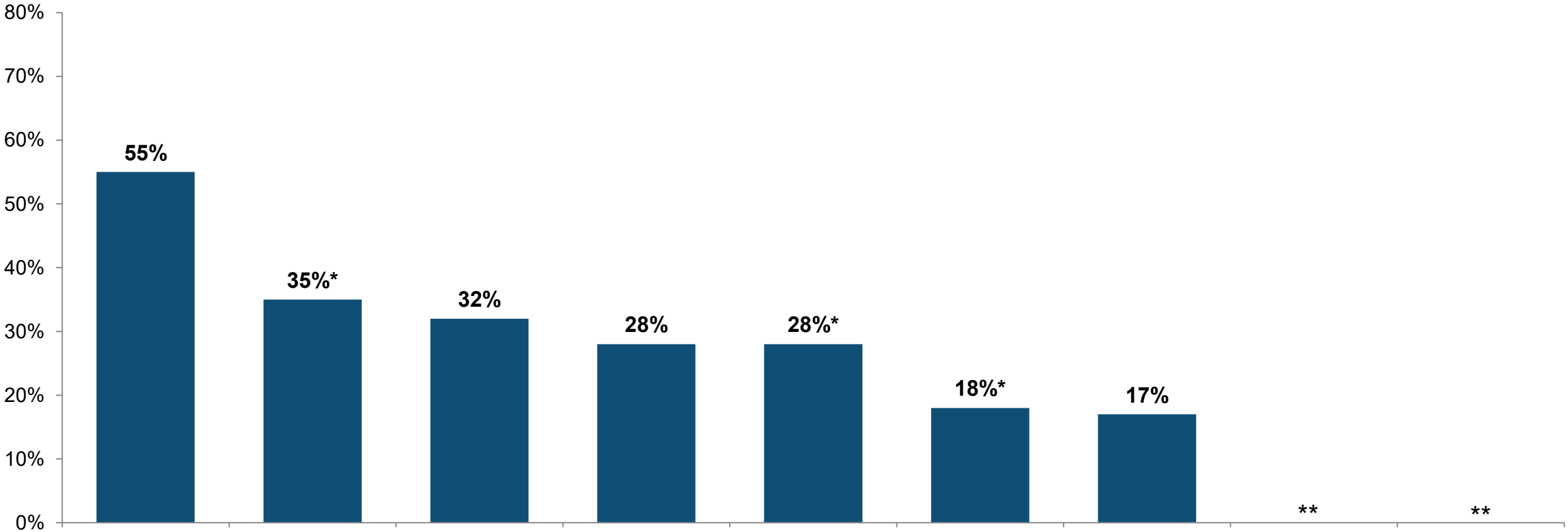
10,100	5,000	2,200	2,200	600	2,800

Number of skill-shortage vacancies (2024)

Base for incidence of skill-shortage vacancies: All sites in Wales: (2024: 5,605; 2022: 4,825; 2019: 6,773). 2024 regional base sizes range from 454 in Mid Wales to 1,321 in South East Wales.

Base for density: All sites in Wales with vacancies: (2024: 1,300; 2019: 1,503; 2022; 1,560). 2024 regional base sizes range from 160 in Mid Wales to 552 in South East Wales.

At the occupational level, the density of skill-shortage vacancies was highest among Skilled Trades roles

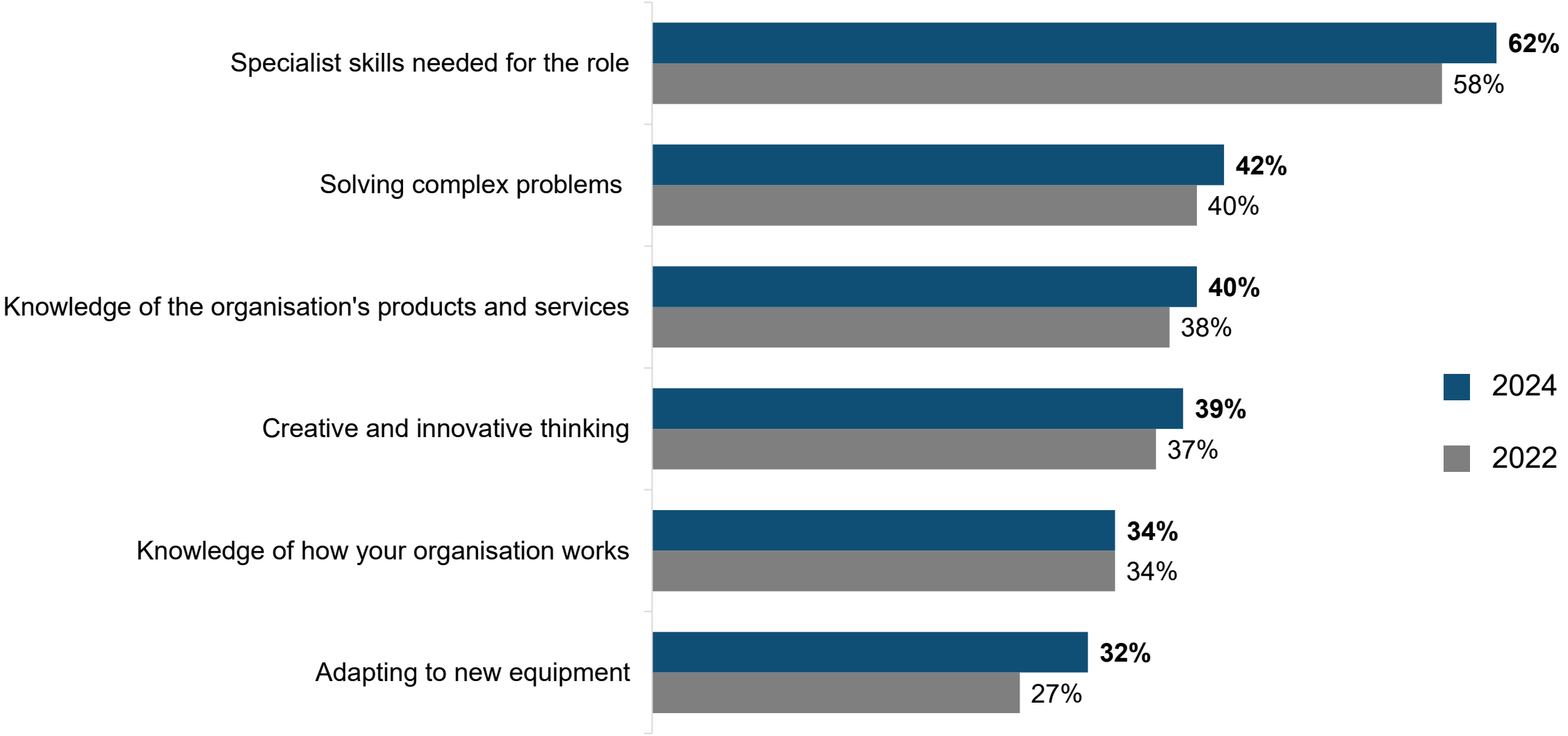


Skilled Trades	Machine Operatives	Professionals	Elementary	Admin. and Secretarial	Sales and Customer Service	Caring, Leisure, Other Services	Managers	Associate Professionals
700	300	200	400	100	100	200	**	**

Number of skill-shortage vacancies (2024)

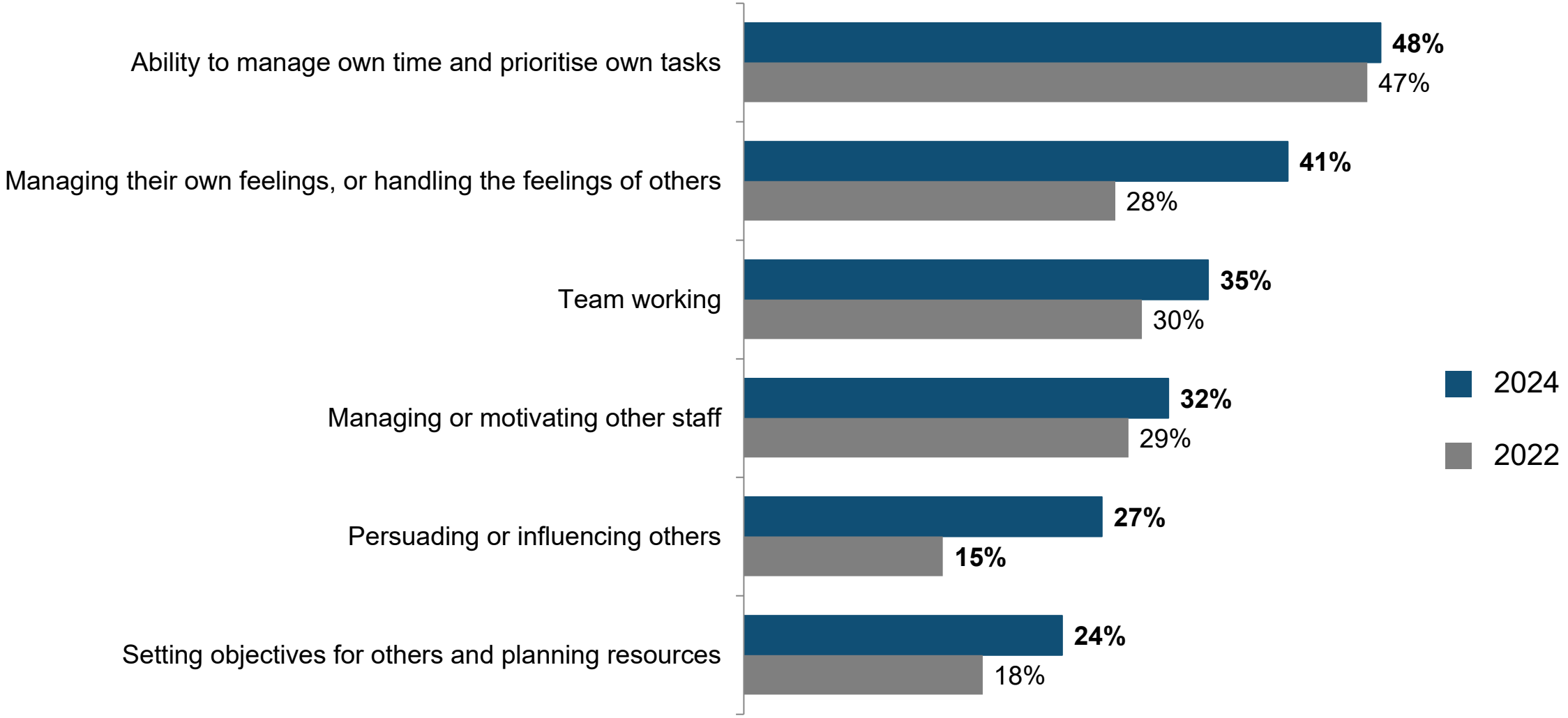
Base: All sites in North Wales with vacancies in the given occupations: (2024 base sizes range from 32 for Sales and Customer Services to 68 for Caring & Leisure). ***Where base sizes are under 30 within a sector, data has been removed (denoted by a double asterisk); where base sizes are between 30 and 49, an asterisk has been included next to the data value. When base sizes are small, volume and density measures at subgroup level can be heavily influenced by a small number of cases. Results should be interpreted with caution.***

Specialist skills or knowledge remains the most common technical and practical skill reported as lacking among SSV applicants



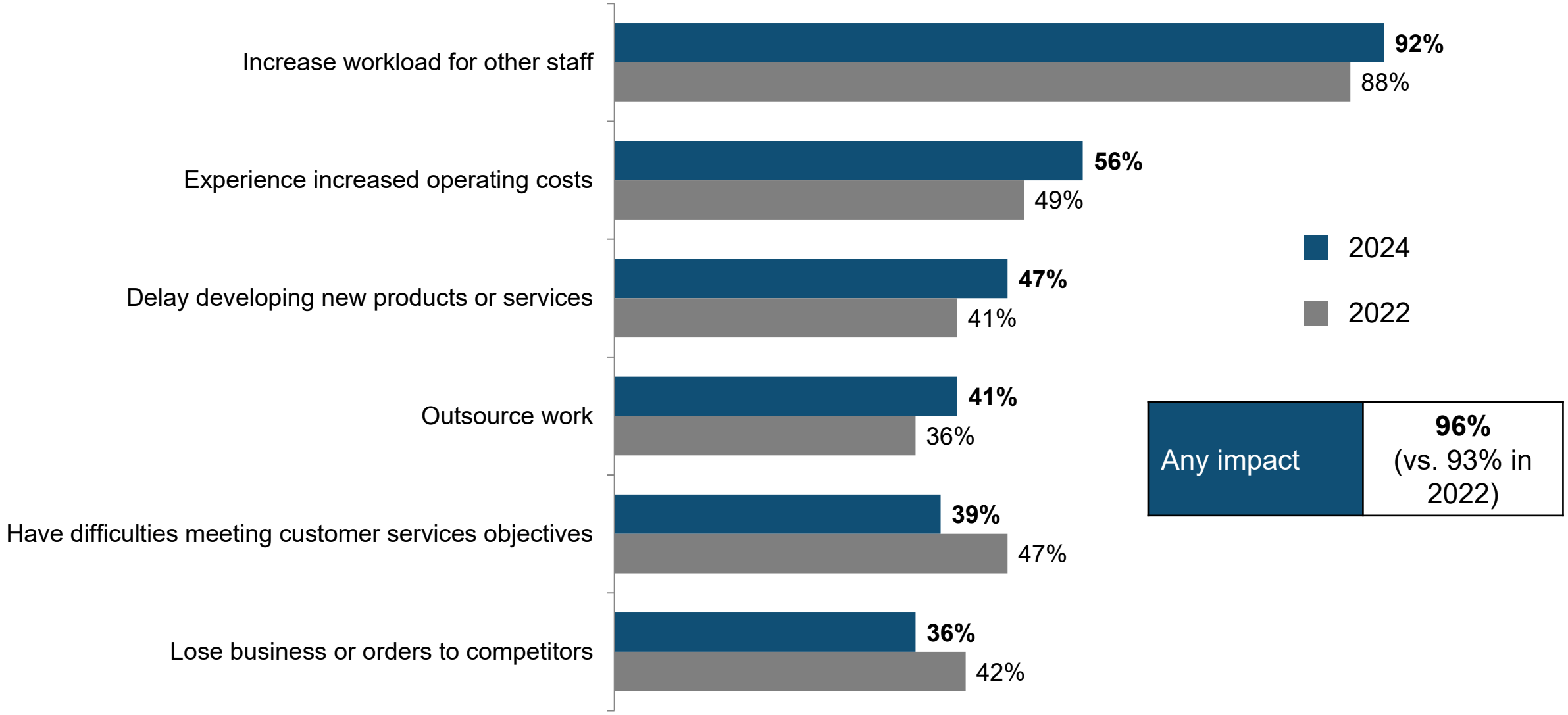
Base: All sites with skill-shortage vacancies in North Wales (2024: 122; 2022: 176). Figures are shown as a percentage of all skill-shortage vacancies followed up (not a percentage of all sites).

The most common people and personal skills reported to be lacking among SSV applicants were time management and task prioritisation, and team working



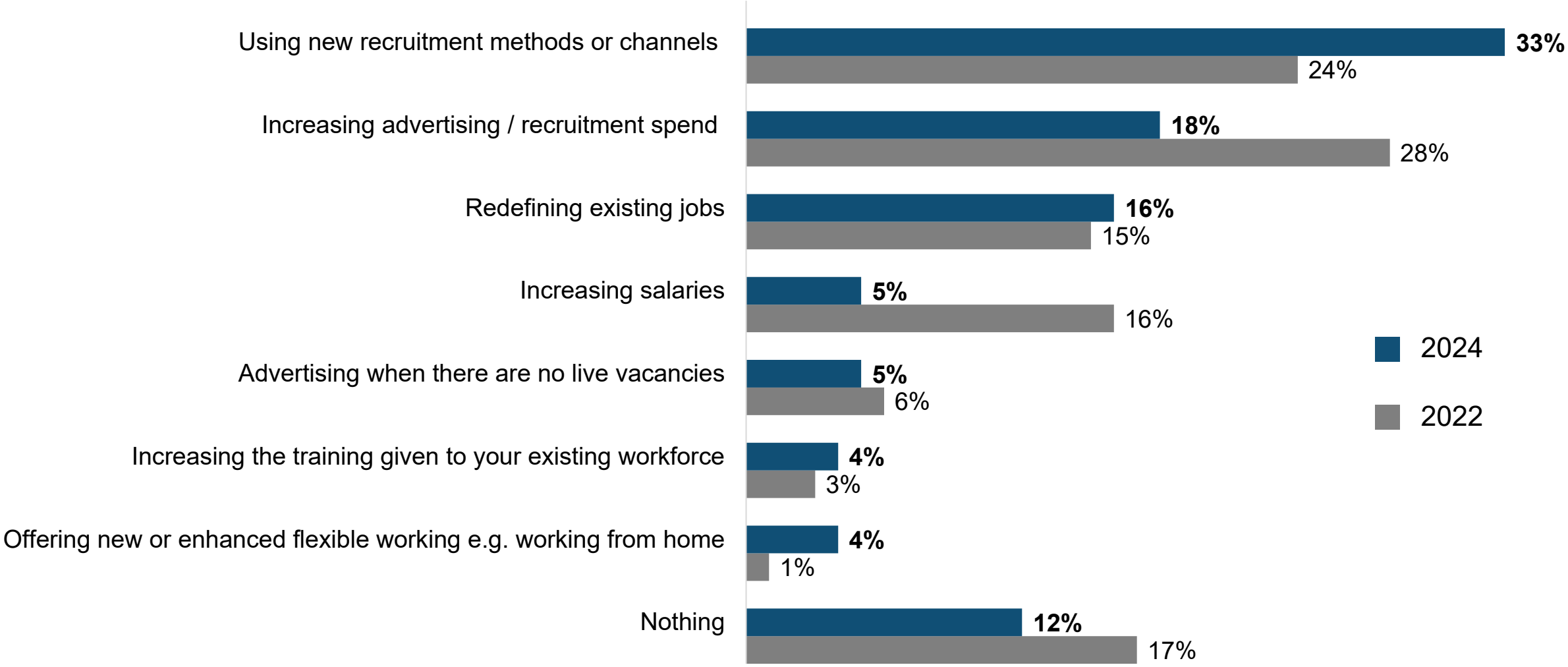
Base: All sites with skill-shortage vacancies in North Wales (2024: 122; 2022: 176).
Figures are shown as a percentage of all skill-shortage vacancies followed up (not a percentage of all sites).

The most commonly reported impact of SSVs was an increased workload for other staff, as was the case in 2022



Base: All sites in North Wales with hard-to-fill vacancies that are all as a result of skill shortages (2024: 111; 2022: 148).

The most common method to fill hard-to-fill vacancies was to use new recruitment methods or channels while increasing advertising / recruitment spend was less common than in 2022.



Base: All sites with hard-to-fill vacancies that are all as a result of skill shortages (2024: 111; 2022: 148)

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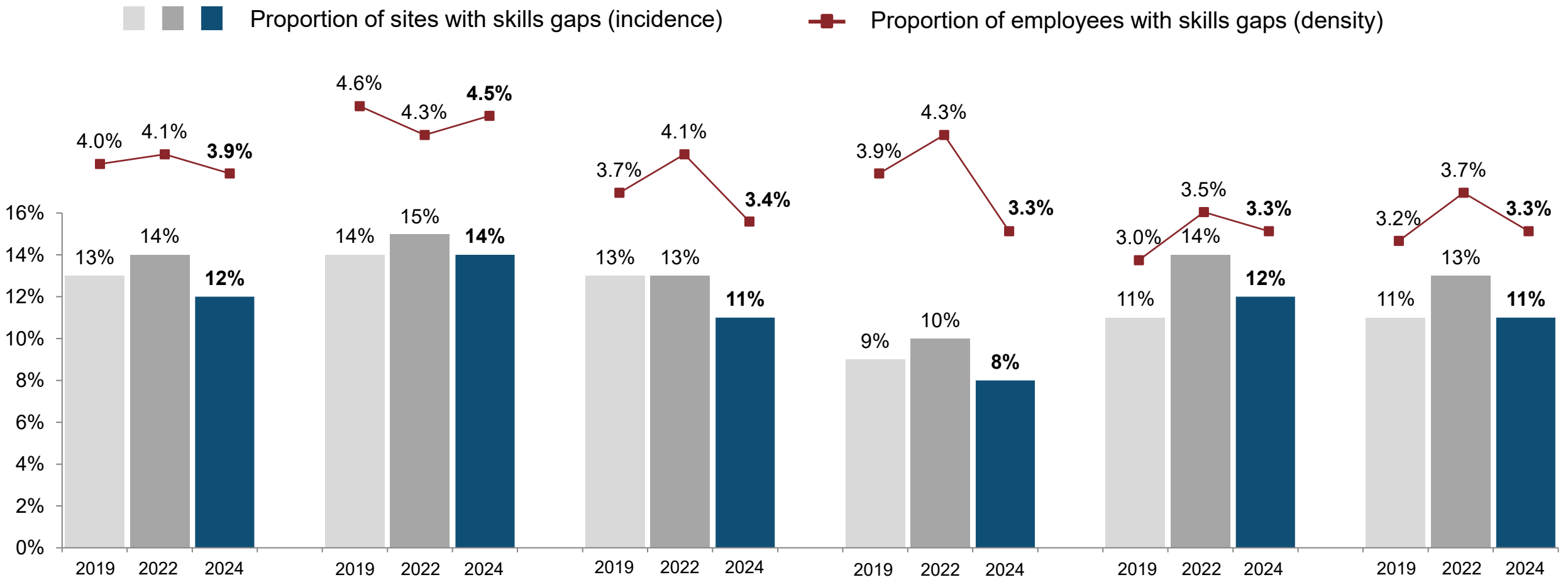
Skills gaps in the existing workforce

Department for Education

IFF Research

Skills gap incidence and density remained in line with 2022 and 2019 levels across all Welsh regions

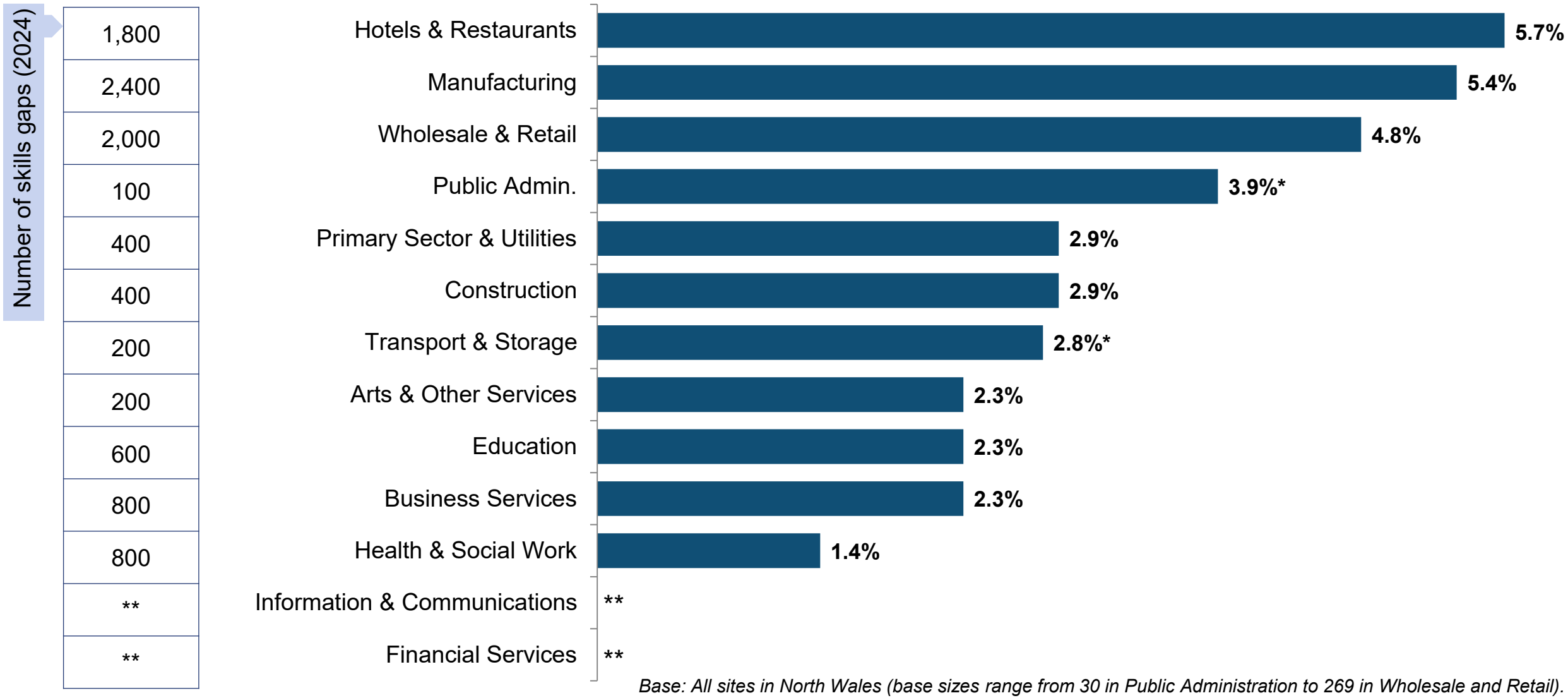


Wales	South East	North	Mid	South West	Mid and South West (combined)
50,400	28,900	9,900	2,700	8,900	11,600

Number of skills gaps (2024)

Base: All sites in Wales (2024: 5,605; 2022: 4,825; 2019: 6,773). 2024 regional base sizes range from 717 in Mid Wales to 2,310 in South East Wales.

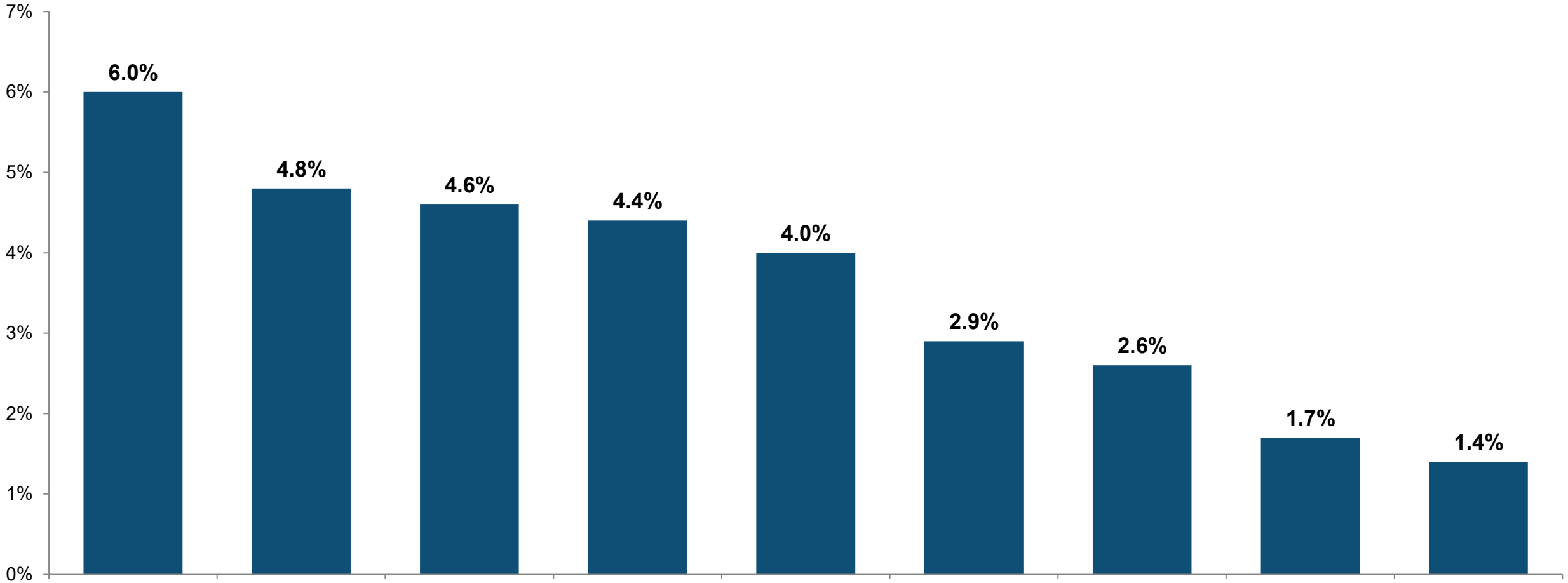
By sector, skills gap density was highest in Hotels & Restaurants and Manufacturing



Base: All sites in North Wales (base sizes range from 30 in Public Administration to 269 in Wholesale and Retail).

Where base sizes are under 30 within a sector, data has been removed (denoted by a double asterisk); where base sizes are between 30 and 49, an asterisk has been included next to the data value. When base sizes are small, volume and density measures at subgroup level can be heavily influenced by a small number of cases. Results should be interpreted with caution.

By occupation, density of skills gaps was highest among Elementary roles

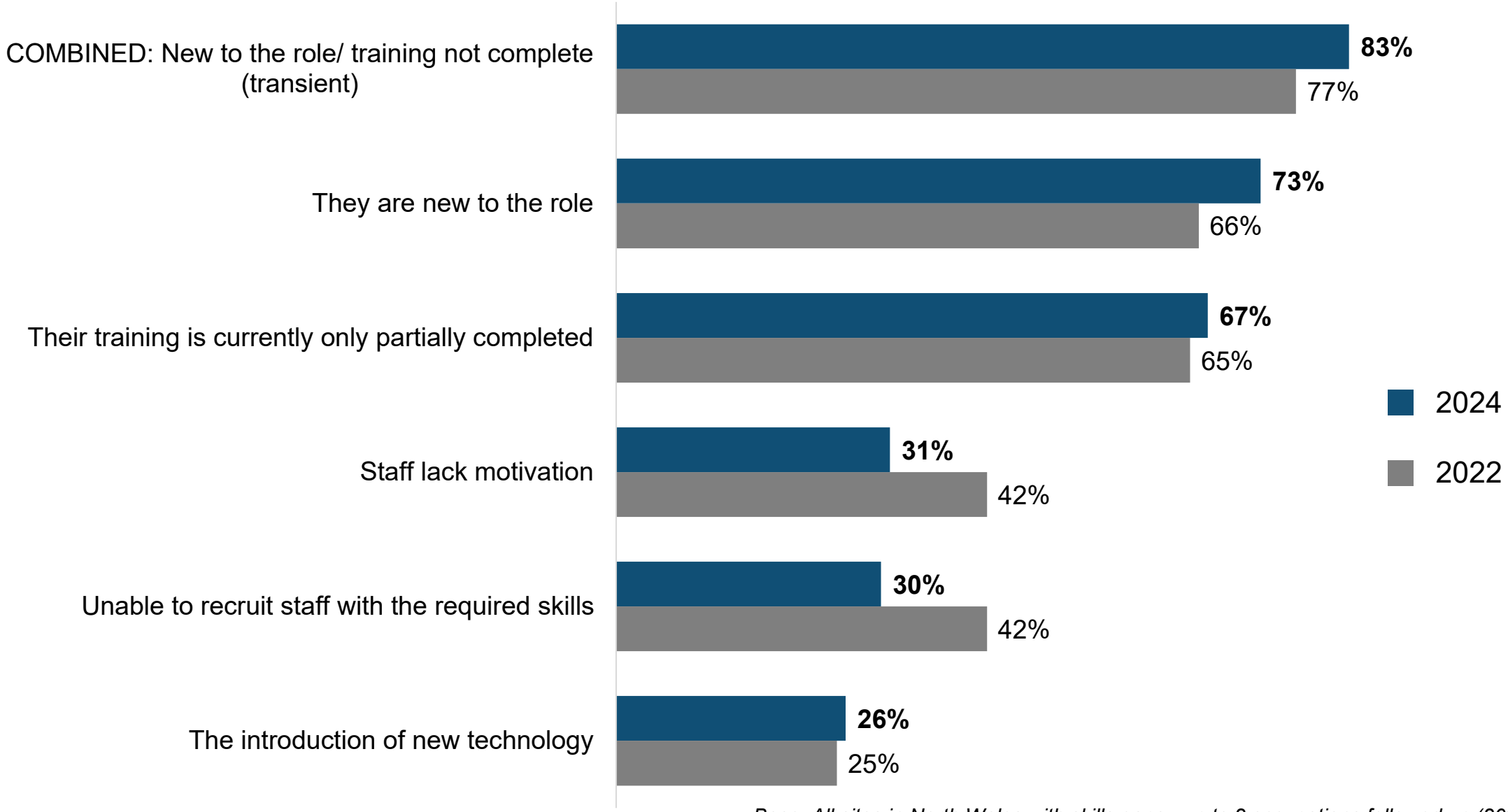


Elementary	Sales and Customer Service	Machine Operatives	Associate Professionals	Skilled Trades	Professionals	Admin. and Secretarial	Caring, Leisure, Other Services	Managers
2,400	1,200	2,100	400	900	700	700	800	700

Number of skills gaps (2024)

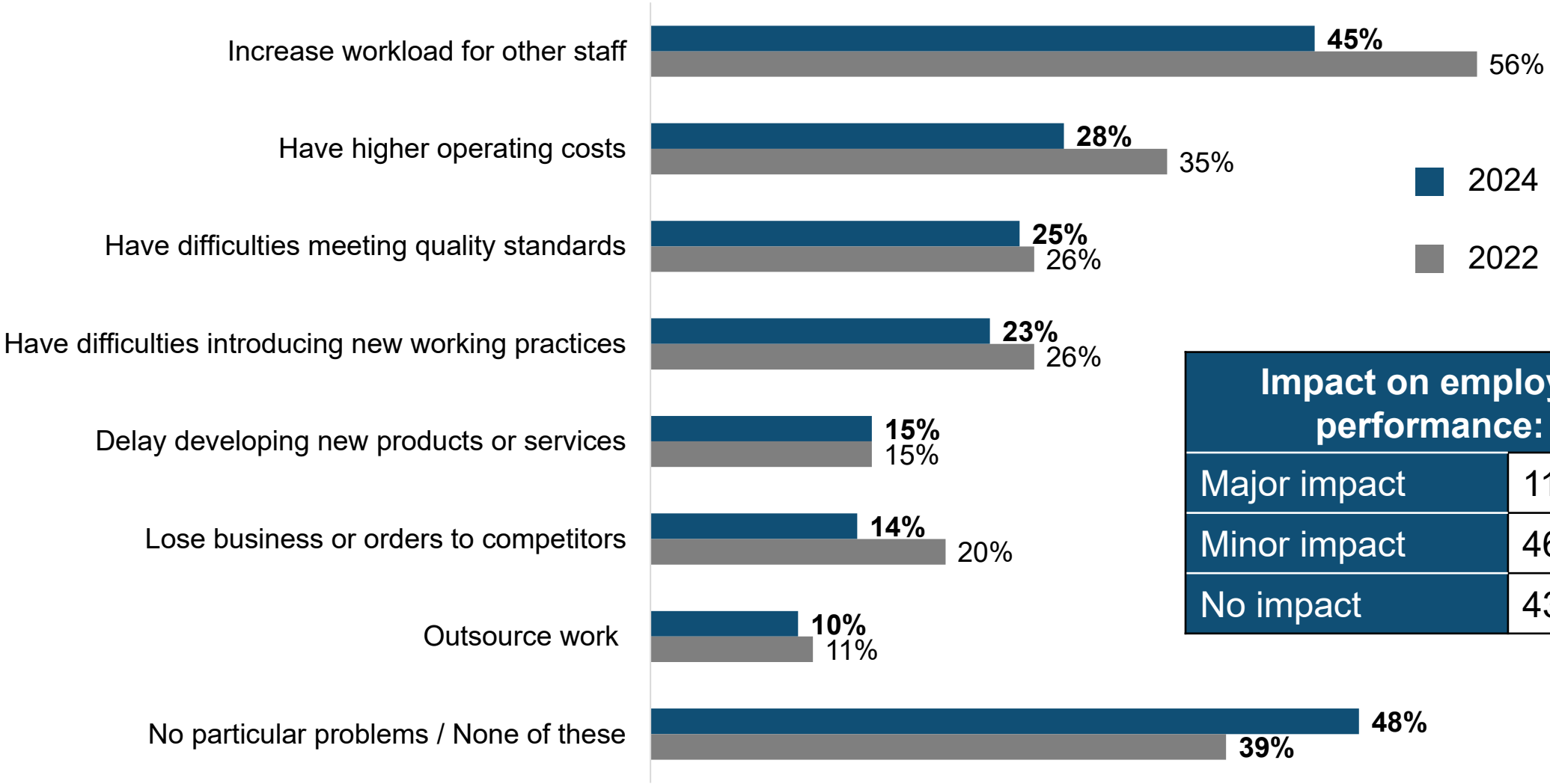
Base: All sites in North Wales with staff in the given occupations (2024 base sizes range from 178 for Associate Professionals to 1,291 for Managers).

Transient factors continued to be the leading causes of skills gaps



Base: All sites in North Wales with skills gaps - up to 2 occupations followed up (2024: 212; 2022: 228)
Figures are shown as a percentage of all skills gaps (not a percentage of all sites)

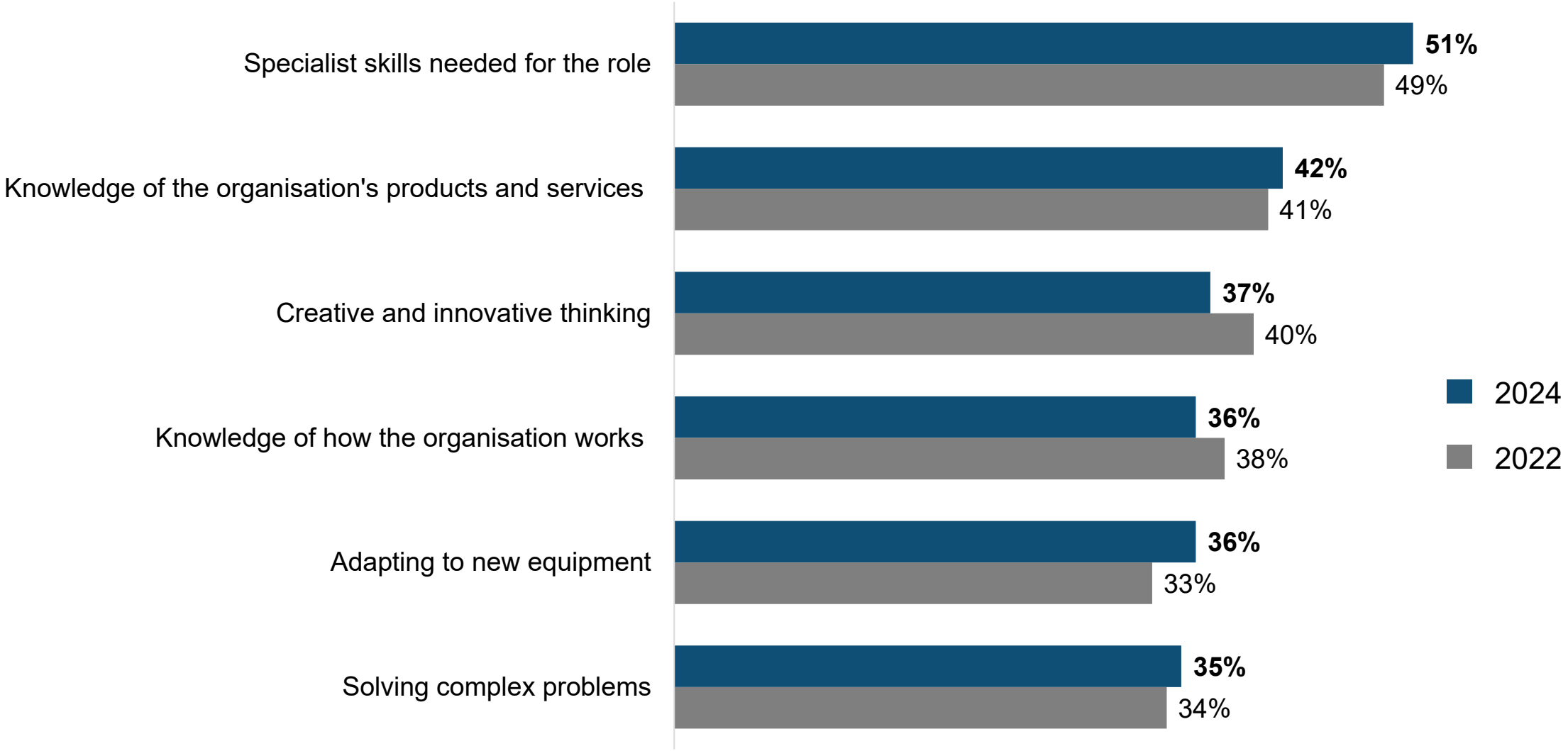
As when looking at SSVs, the main impact of skills gaps continued to be increased workloads for other staff members



Impact on employer performance:	
Major impact	11%
Minor impact	46%
No impact	43%

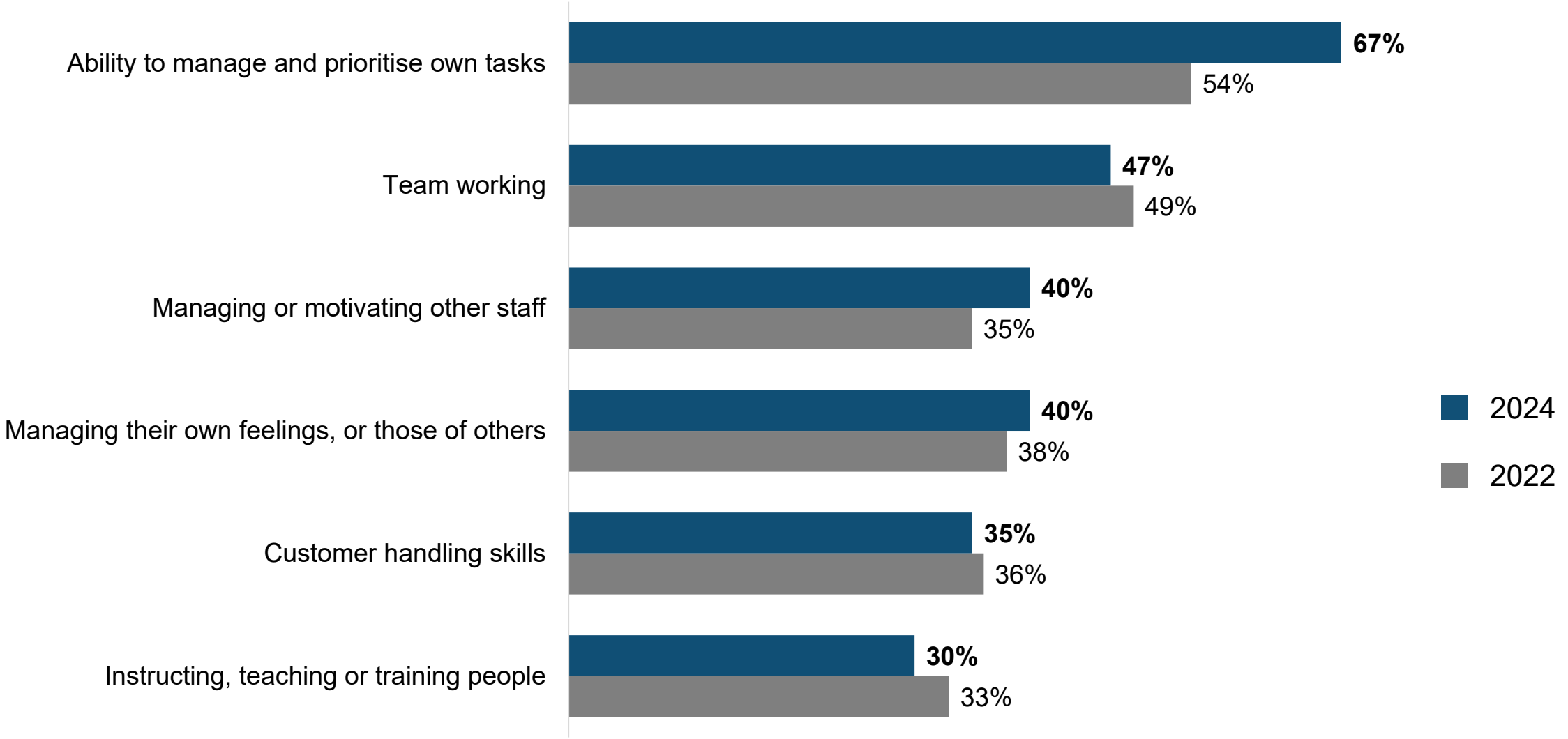
Base: All sites in North Wales with skills gaps (2024: 212; 2022: 228).

Specialist skills or knowledge remained the most common technical and practical skill reported as lacking among the existing workforce



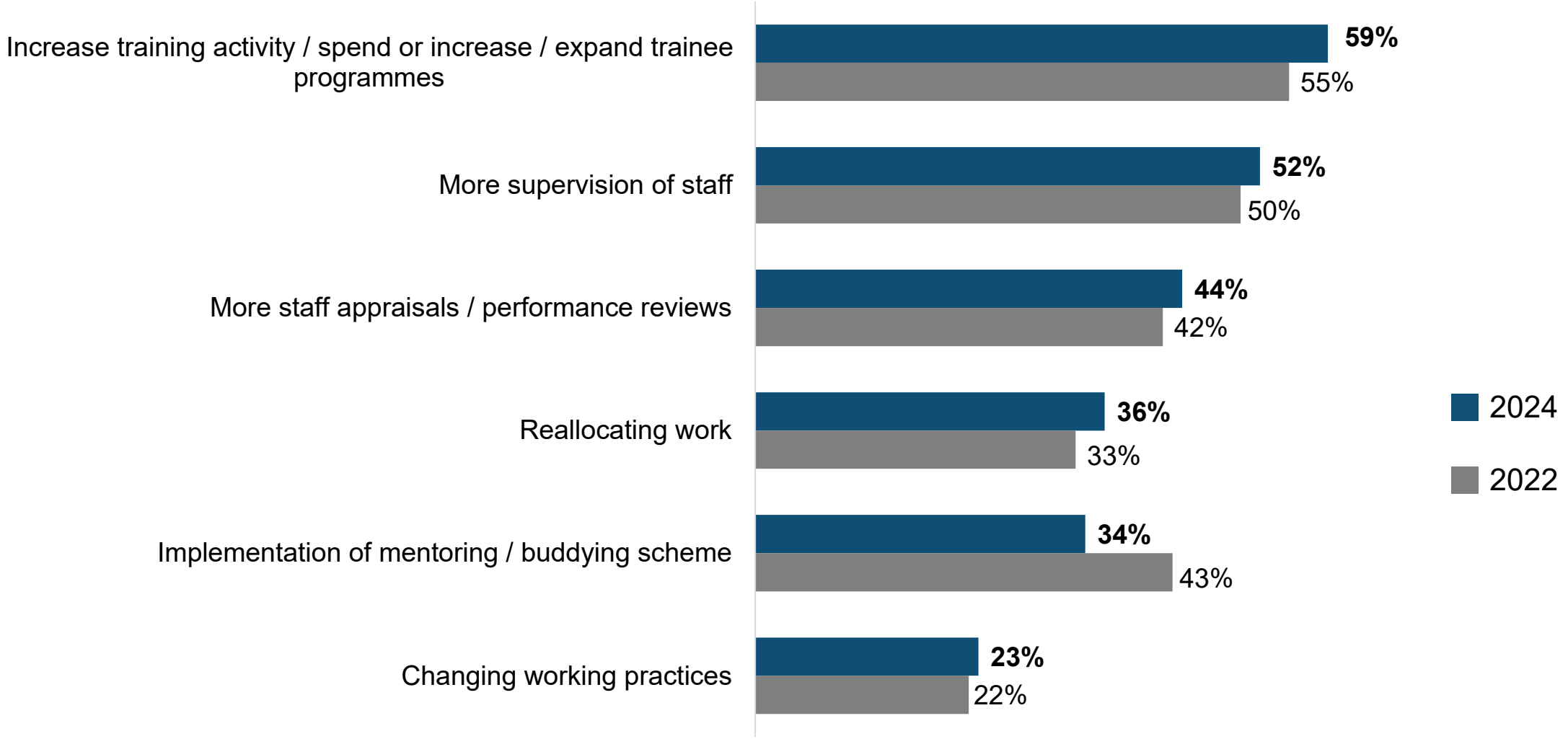
Base: All sites in North Wales with skills gaps - up to 2 occupations followed up (2024: 212; 2022: 228). Figures are shown as a percentage of all skills gaps (not a percentage of all sites).

There was a notable increase in the proportion of the workforce reported to be lacking the ability to manage their own time and prioritise tasks



Base: All sites in North Wales with skills gaps - up to 2 occupations followed up (2024: 212; 2022: 228)
Figures are shown as a percentage of all skills gaps (not a percentage of all sites)

The most common action taken to overcome skills gaps continues to be to increase training activity / spend or to increase / expand trainee programmes



Base: All sites in North Wales with skills gaps (2024: 212; 2022: 228).

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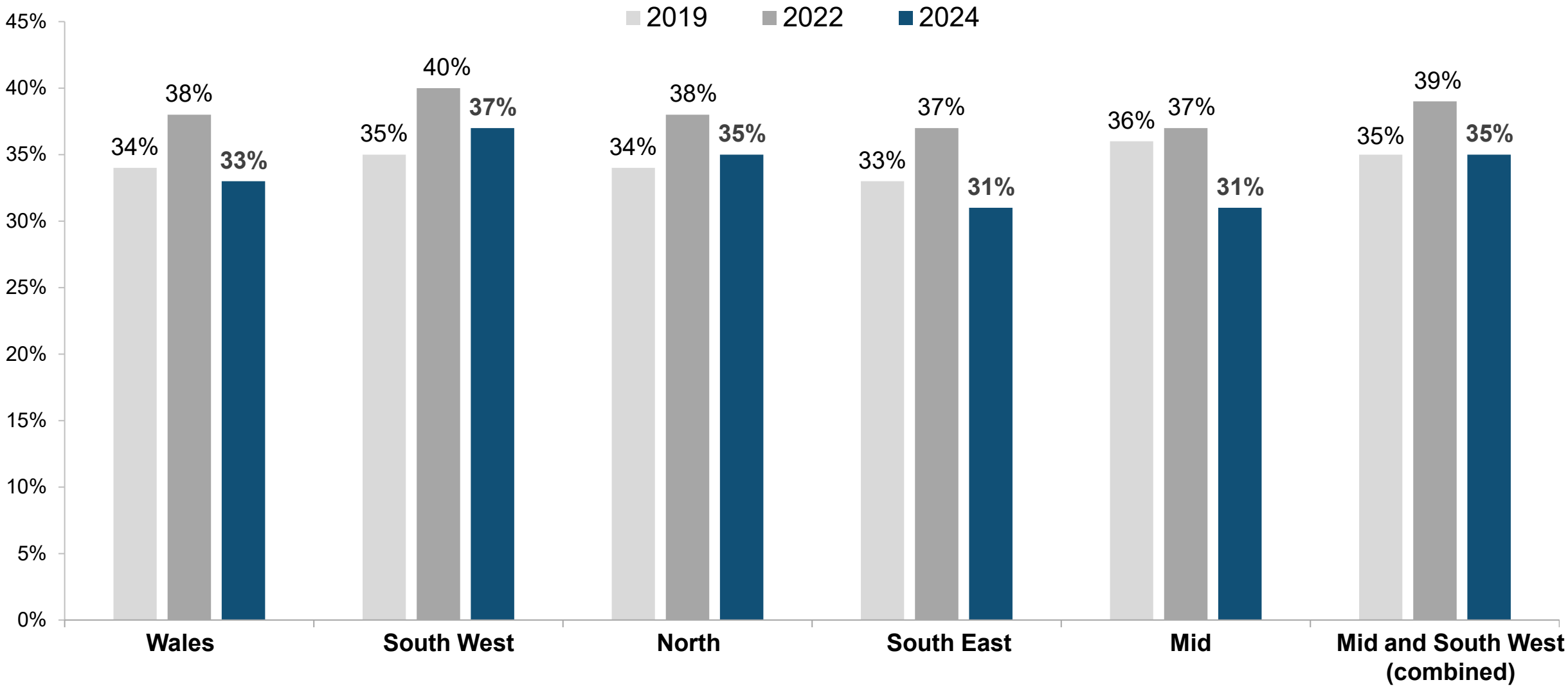
Under-use of skills and qualifications

Department for Education

IFF Research

South East Wales was the only Welsh region which saw a notable decrease in the proportion of sites with underutilised staff when compared with 2022



Base: All sites 2024 (Module A): Wales: 1,379; regional base sizes range from 181 in Mid Wales to 568 in South East Wales.

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Training and workforce development

Department for Education

IFF Research

Training and workforce development – North Wales summary

Measure	2015	2017	2019	2022	2024
% of employers that train	66%	61%	63%	59%	**61%**
% of employers that train *off*-the-job	53%	47%	46%	37%	**39%**
% of employers that train *on*-the-job	50%	47%	48%	49%	**50%**
% that *only* train *on*-the-job	12%	15%	17%	22%	**22%**
% of staff trained over the last 12 months	60%	55%	68%	65%	**66%**
Days training per person trained	6.7	5.6	5.5	6.9	**4.9**
Total training days provided	1.1m	0.9m	1.1m	1.3m	**0.9m**

The number of training days per trainee in North Wales decreased from 2022 and was lowest compared to all other Welsh regions

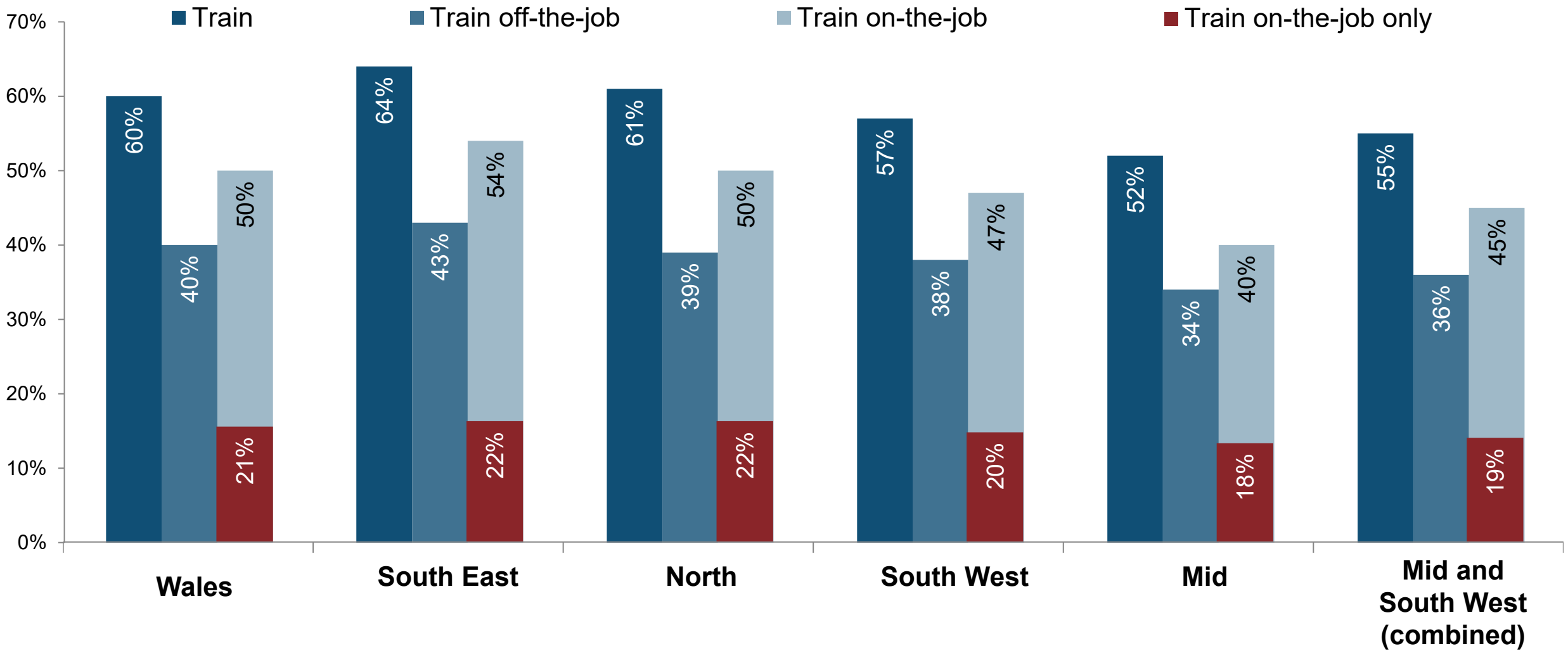
By nation and region	Days per person trained			Total training days		
	2019	2022	**2024**	2019	2022	**2024**
Wales	5.1	6.8	**6.6**	4.2m	5.3m	**5.4m**
North	5.5	6.9	**4.9**	1.1m	1.3m	**0.9m**
Mid	6.4	5.2	**5.8**	0.3m	0.3m	**0.3m**
South East	4.7	7.4	**8.0**	1.9m	2.8m	**3.3m**
South West	5.4	5.7	**5.3**	0.9m	1.0m	**0.9m**
Mid and South West (combined)	5.6	5.6	**5.4**	1.2m	1.2m	**1.2m**

The Wholesale and Retail sector had the highest number of training days per trainee

By sector	Days per person trained	Total training days
Primary Sector & Utilities	**5.4***	**41,000***
Manufacturing	**3.0**	**68,000**
Construction	**5.4**	**42,000**
Wholesale & Retail	**7.7**	**155,000**
Hotels & Restaurants	**5.8**	**107,000**
Transport & Storage	**	**
Information & Communications	**	**
Financial Services	**	**
Business Services	**3.1**	**91,000**
Public Admin.	**	**
Education	**3.4**	**72,000**
Health & Social Work	**5.6**	**284,000**
Arts & Other Services	**5.6**	**31,000**

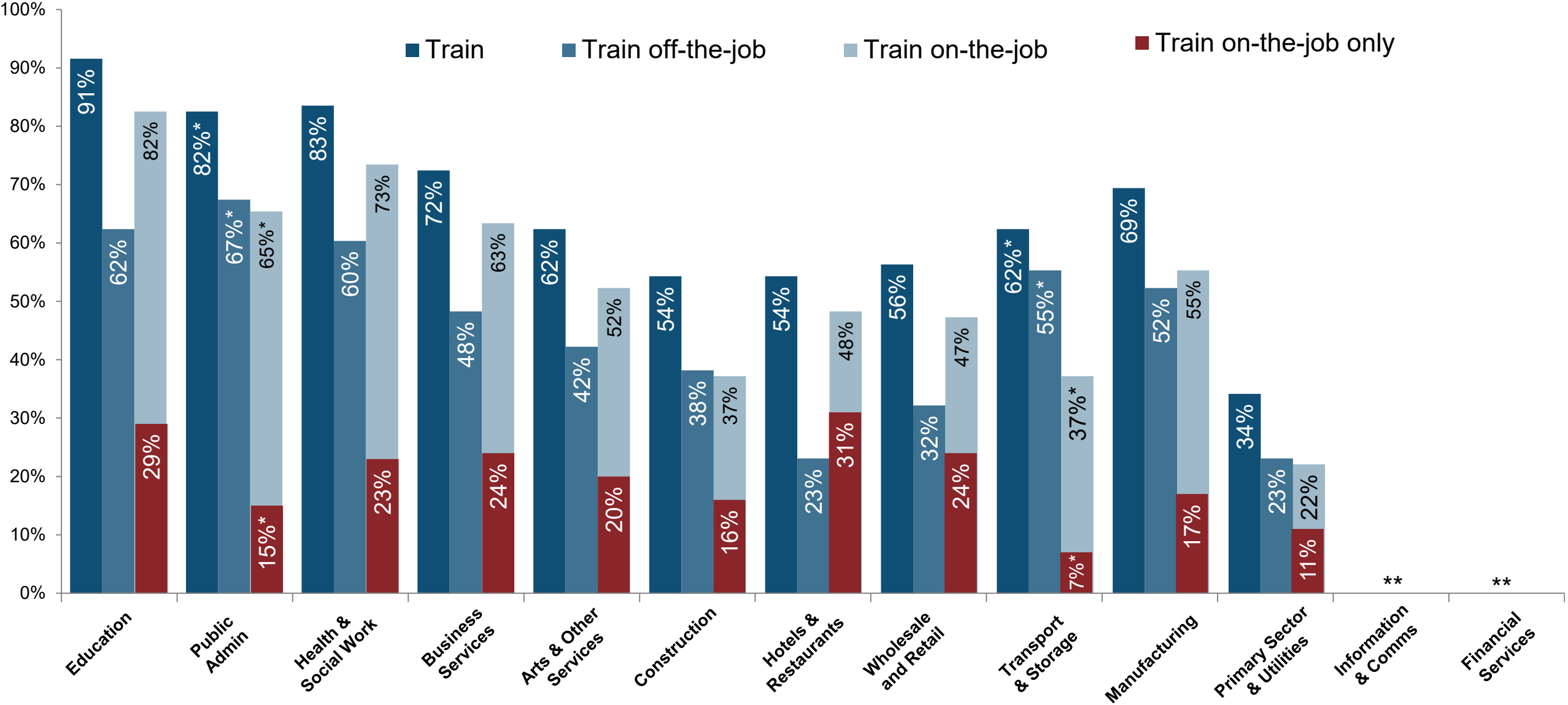
Results for Transport & Storage, Information & Communications, Financial Services and Public Admin not shown due to low base sizes. ***Where base sizes are between 30 and 49, an asterisk has been included next to the data value; When base sizes are small, volume and density measures at subgroup level can be heavily influenced by a small number of cases. Results should be interpreted with caution.***

The proportion of employers in North Wales who had arranged training for their staff was similar to the Wales average



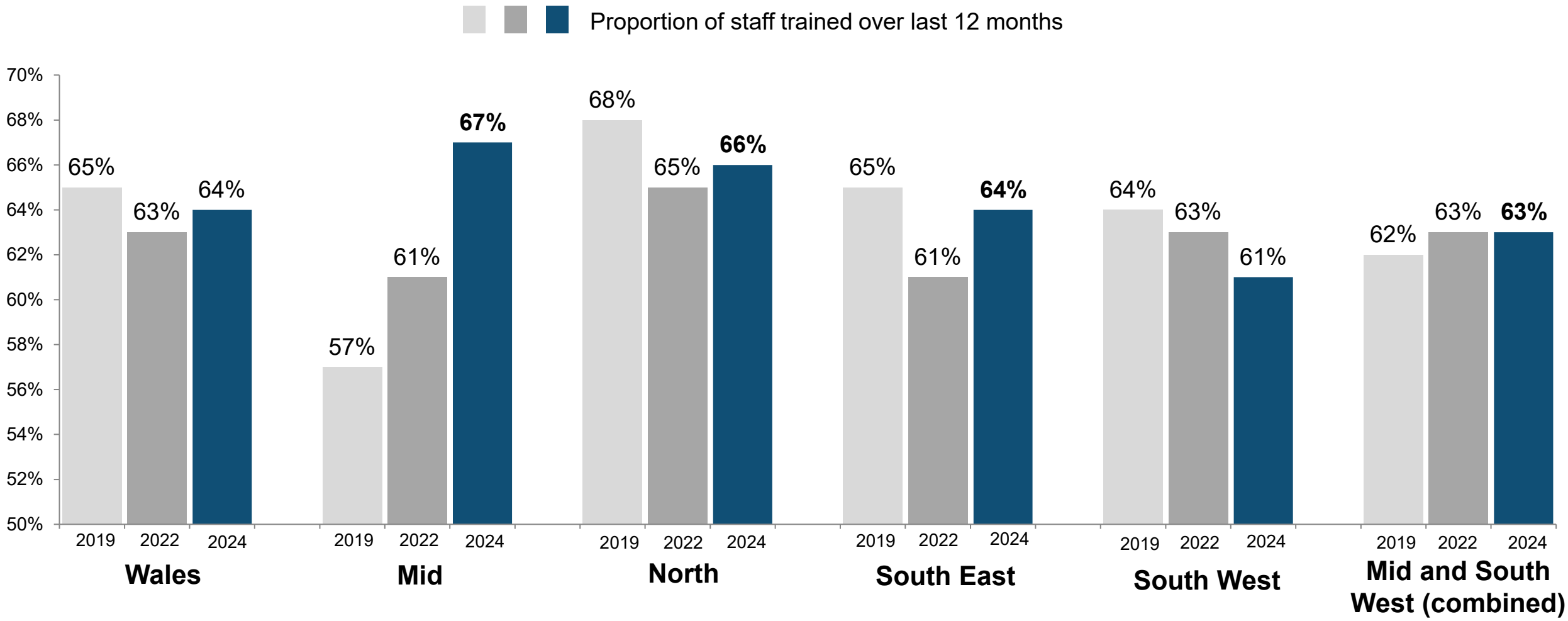
Base: All sites in Wales: 5,605; Regional base sizes range from 717 in Mid Wales to 2,310 in South East Wales.

Employers in the Education, Public Administration and Health & Social Work sectors were most likely to have provided any training



Base: All sites in North Wales (base sizes range from 30 in Public Administration to 269 in Wholesale and Retail). ***Where base sizes are under 30 within a sector, data has been removed (denoted by a double asterisk); where base sizes are between 30 and 49, an asterisk has been included next to the data value.***

The proportion of staff trained in North Wales did not significantly change when compared with previous years

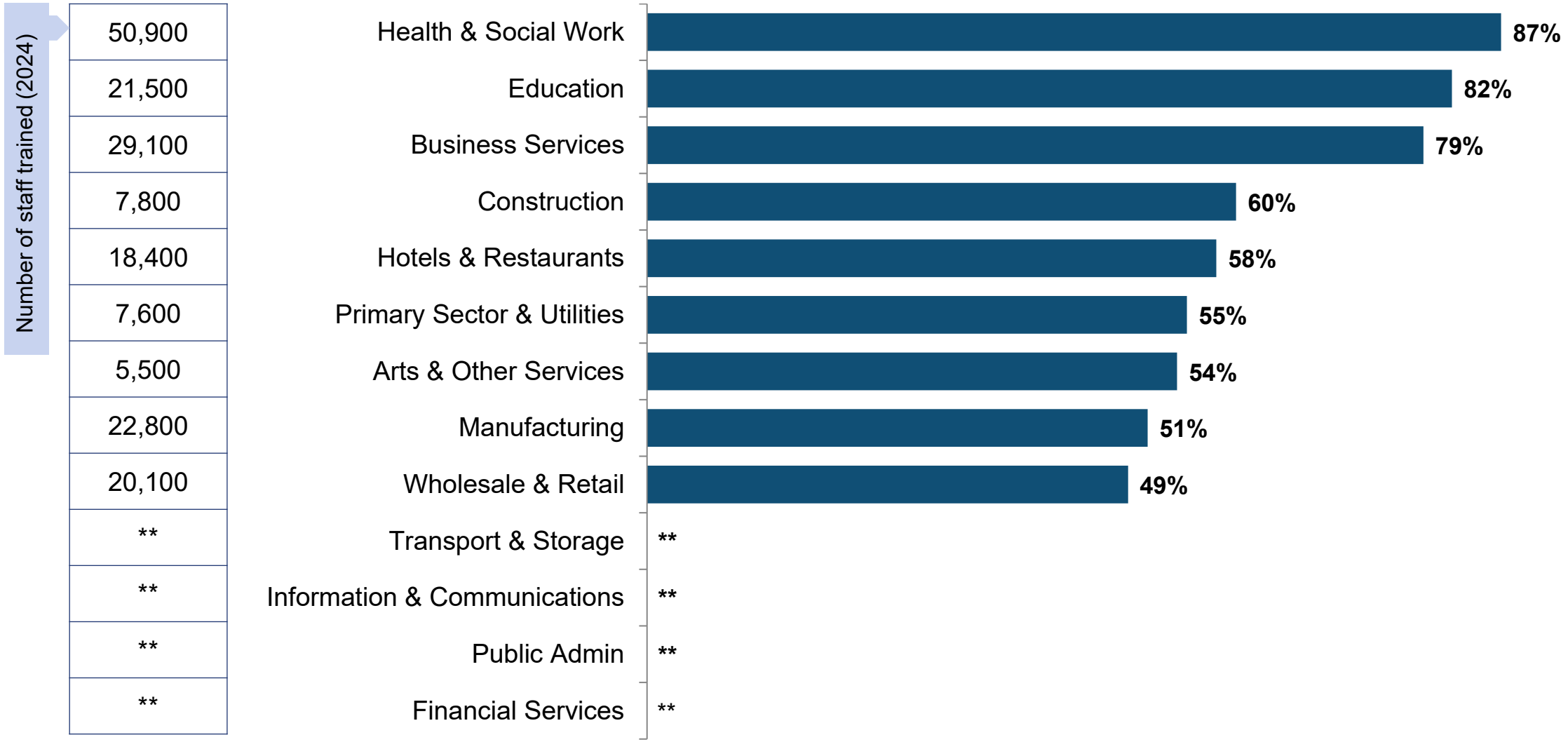


823,400	54,000	192,000	410,700	166,700	220,700

Number of staff trained (2024)

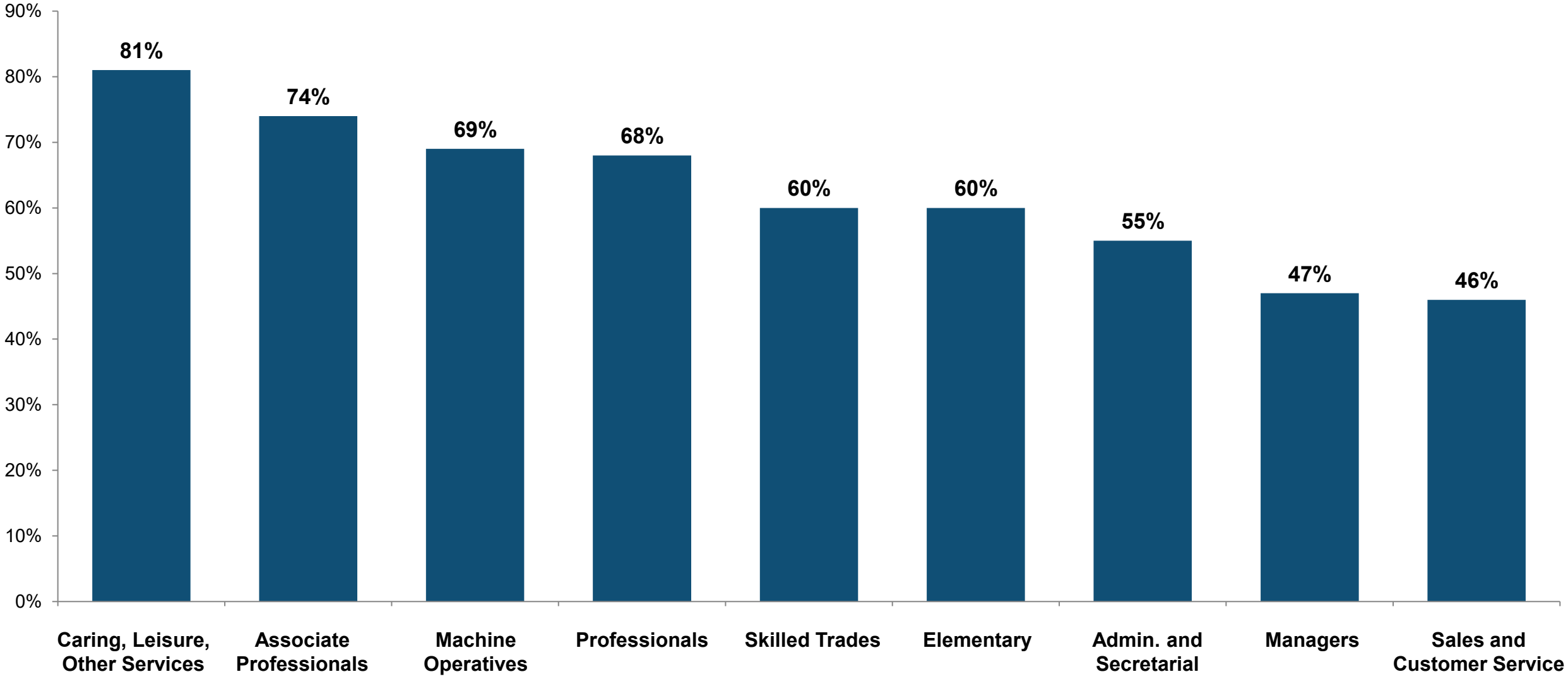
Base: All sites in Wales (2024: 5,605; 2022: 4,825; 2019: 6,773). 2024 regional base sizes range from 717 in Mid Wales to 2,310 in South East Wales.

Employers in the Health & Social Work and Education sectors had trained the highest proportion of their staff



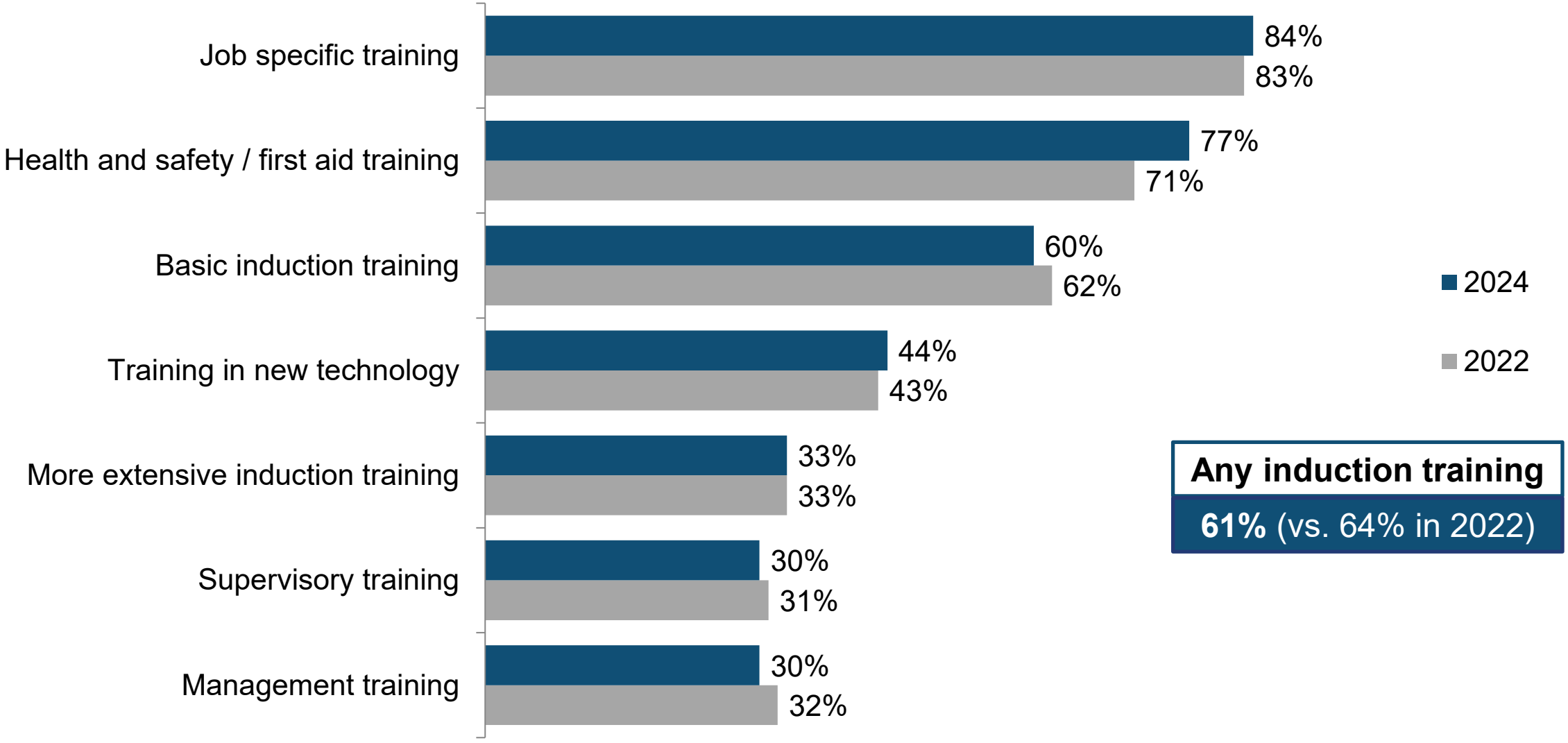
Base: All sites in North Wales (base sizes range from 82 in Manufacturing to 269 in Wholesale and Retail). ***Where base sizes are under 30 within a sector, data has been removed (denoted by a double asterisk); where base sizes are between 30 and 49, an asterisk has been included next to the data value. When base sizes are small, volume and density measures at subgroup level can be heavily influenced by a small number of cases. Results should be interpreted with caution.***

Those in Caring, Leisure & Other Services roles were most likely to have received training in the past 12 months



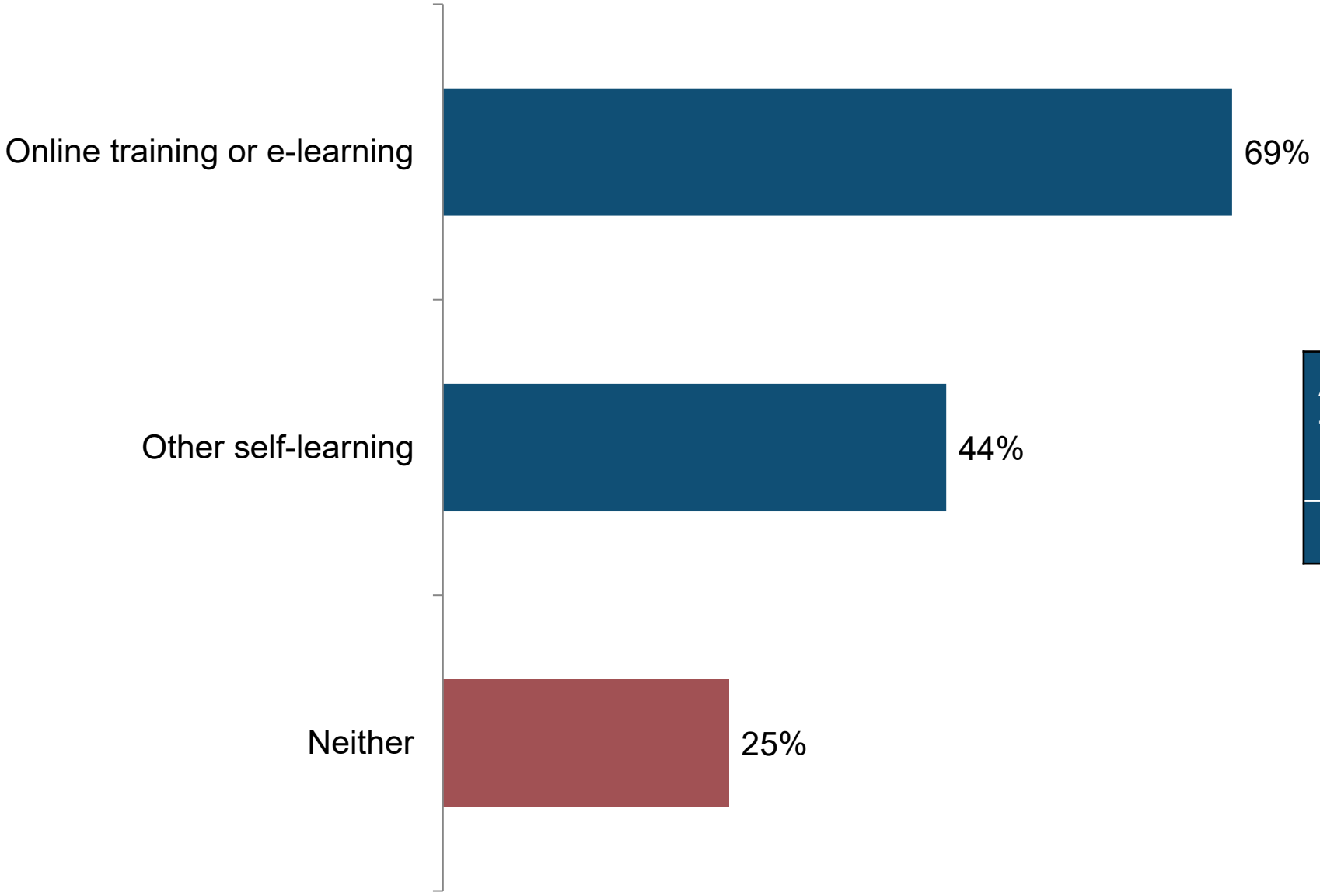
Base: All that employ each occupation in North Wales (excluding modelled data). (2024 base sizes range from 130 for Associate Professionals to 649 for Managers).

The most common type of training, as in 2022, was job specific training, followed by health and safety / first aid training



Base: All sites in North Wales that train (2024: 991; 2022: 855)

Around 7 in 10 training employers offered online or e-learning training



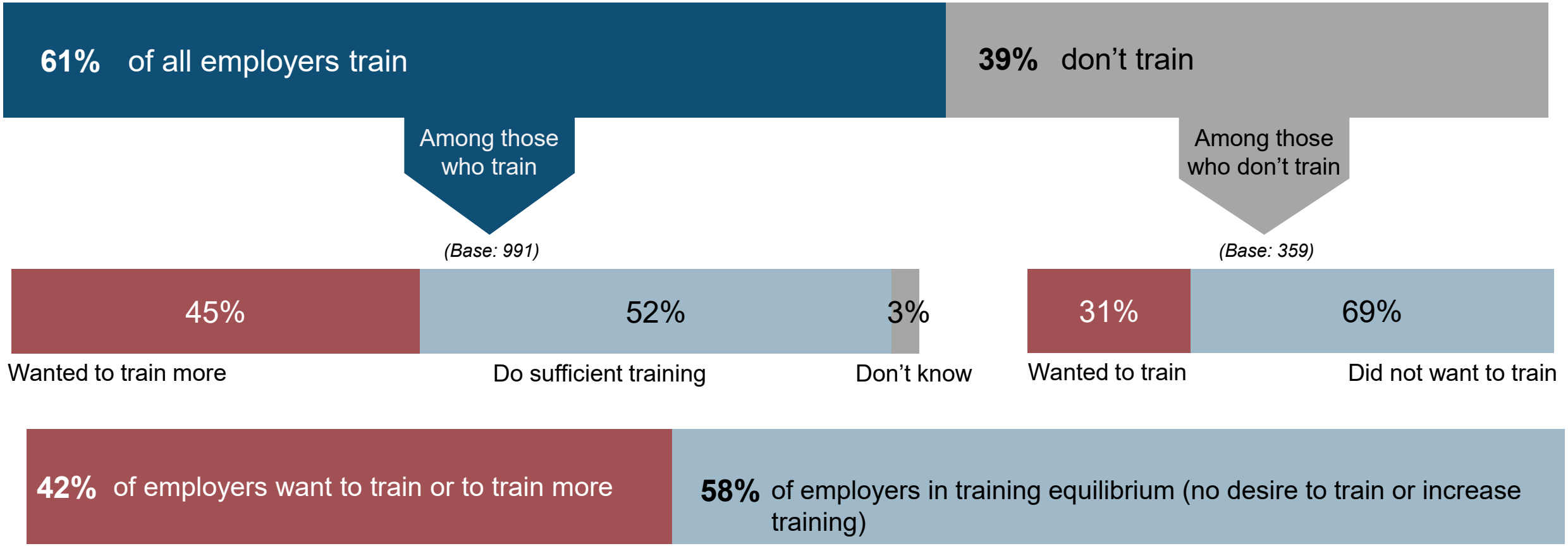
Any online training or self-learning	74%
Both	39%

Base: All sites in North Wales that train (2024: 991)

The inability to spare more staff time and a lack of funds for training were the most cited barriers to employers providing more training, as in 2022

Base: All sites in North Wales who would have provided more training in the past 12 months if they could (2024: 494; 2022: 456)

A majority of employers were content with the amount of training that they provide



42% of employers want to train or to train more

58% of employers in training equilibrium (no desire to train or increase training)

*Note training employers responding 'Don't know' (3%) have been included in the group 'Want to train more' on the final measure

Base: All sites in North Wales (1,350). Note, the percentages may not sum to 100% due to rounding.

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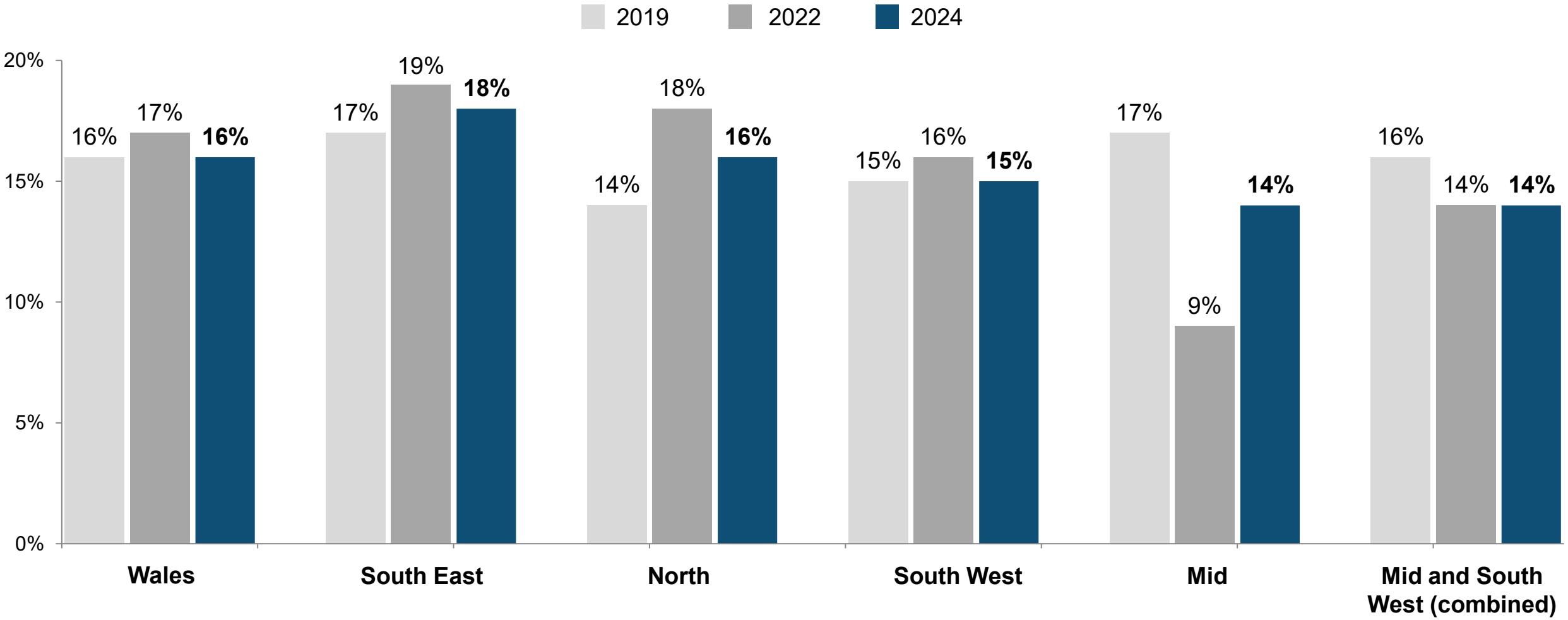
Apprenticeships

Department for Education

IFF Research

The proportion of employers who offered apprenticeships was similar to previous years across the Welsh regions



Base: All sites in Wales (Module A) 2024: 1,379; 2022: 1,239; 2019: 1,704. 2024 regional base size ranges from 181 in Mid Wales to 568 in South East Wales.

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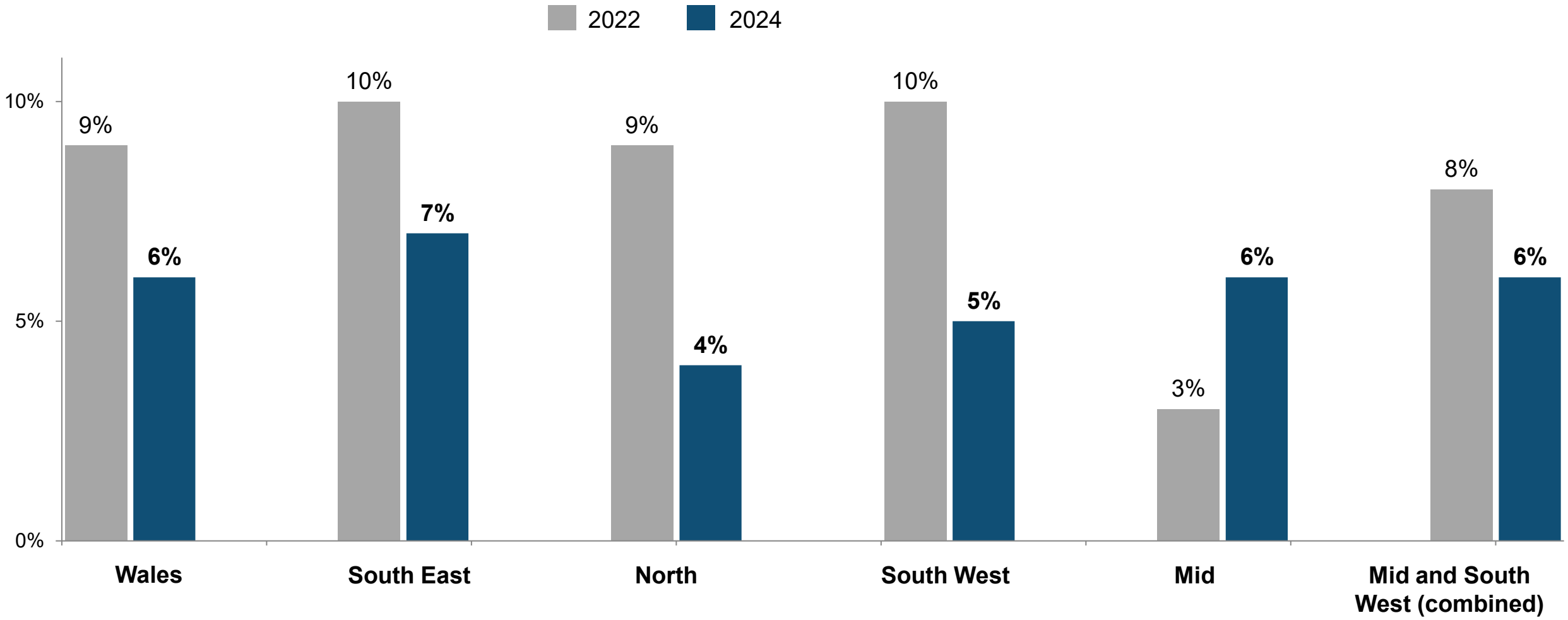
High Performance Working Practices

High Performance Working (HPW) practices are practices recognised to ensure employee skills are harnessed, nurtured and used to their best effect

Department for Education

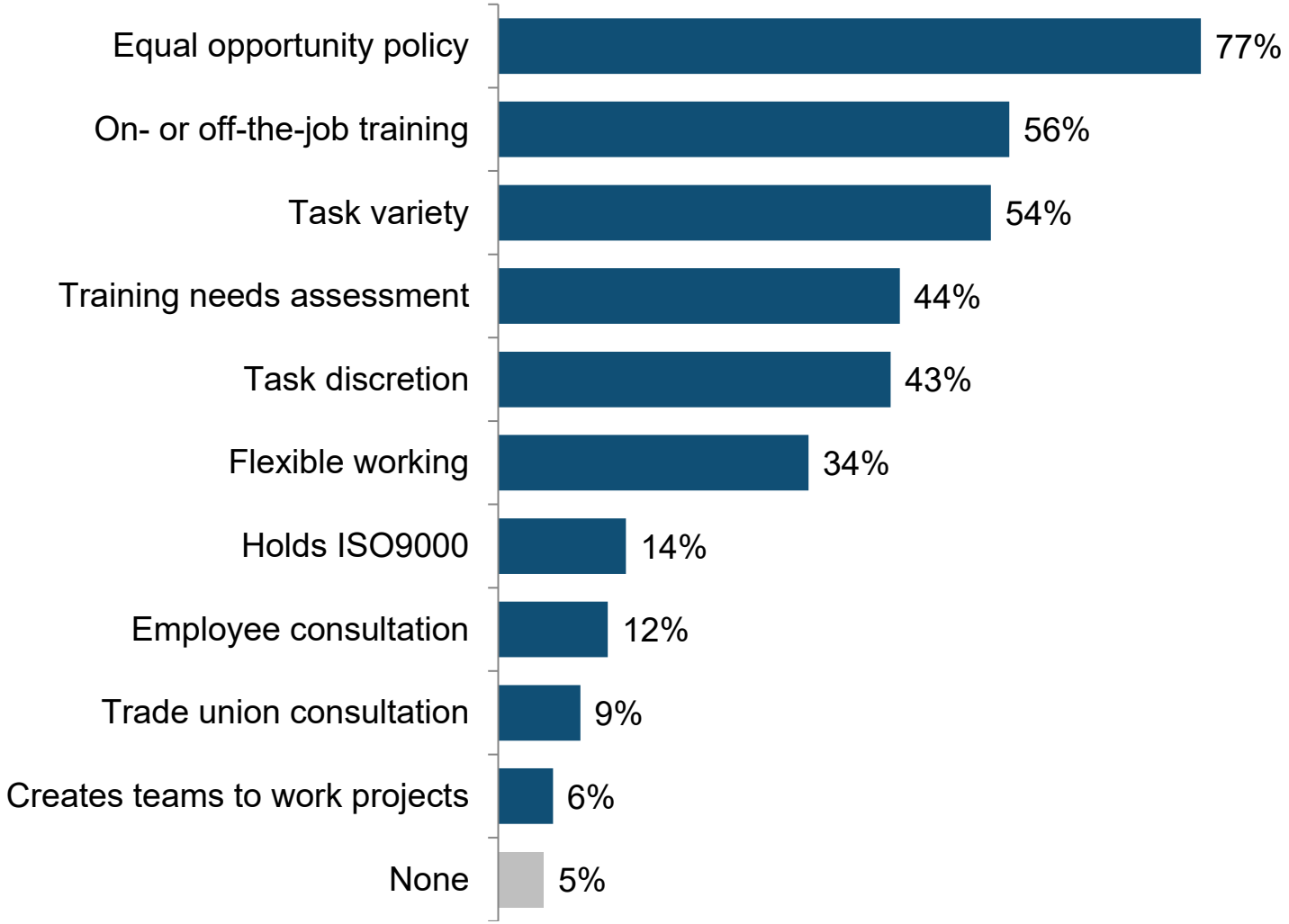
IFF Research

Employers in North Wales were least likely to be HPW employers



Base: All sites in Wales (Module D) 2024: 1,396; 2022: 1,153. 2024 regional base size ranges from 190 in Mid Wales to 595 in South East Wales.

The most common HPW practice implemented by employers was having an equal opportunity policy



4%

were HPW employers (defined as having 7 of 10 HPW measures in place)

3 practices

was the average number of HPW practices adopted

Base: All sites in North Wales (328).

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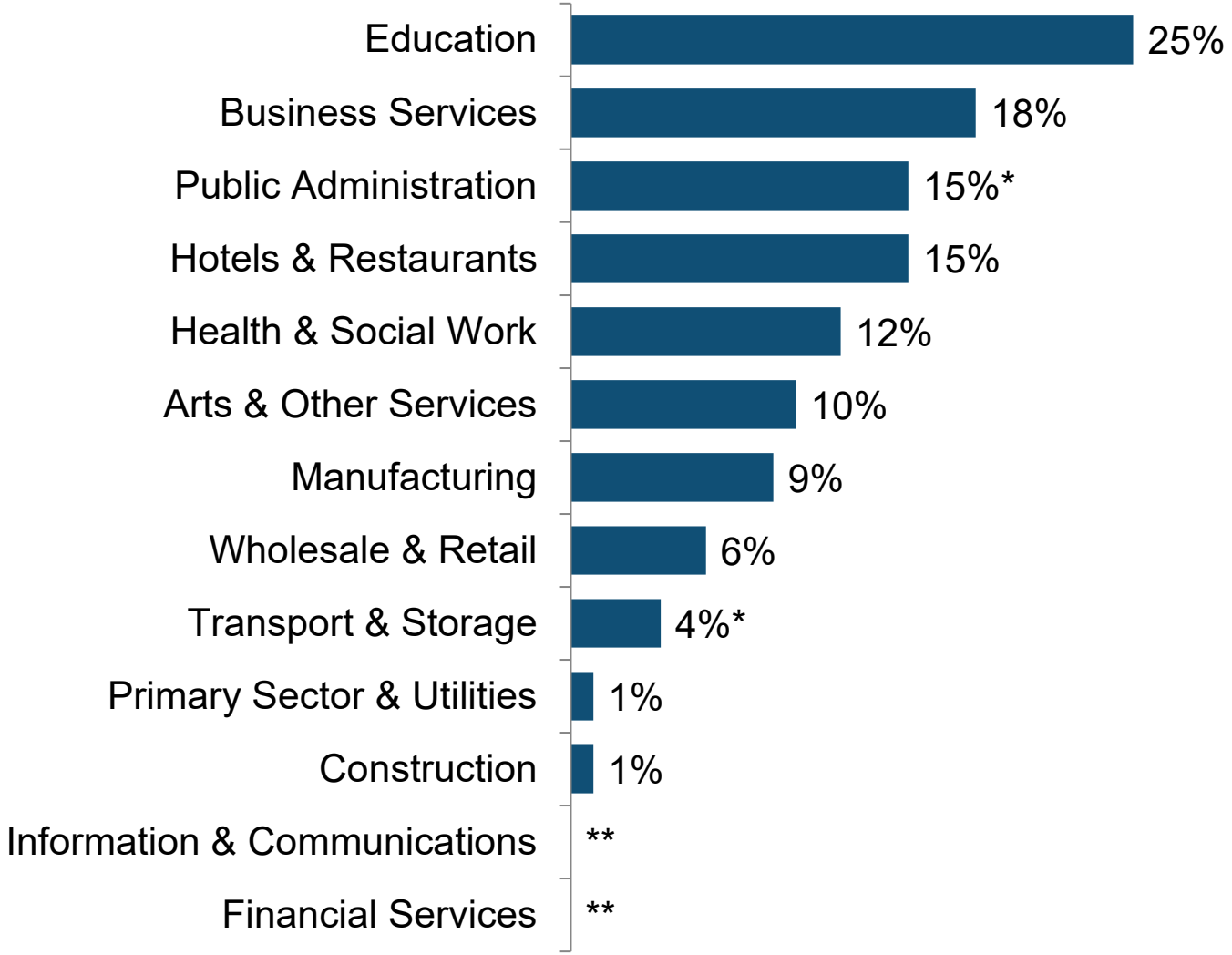
Current and planned use of Artificial Intelligence (AI)

Department for Education

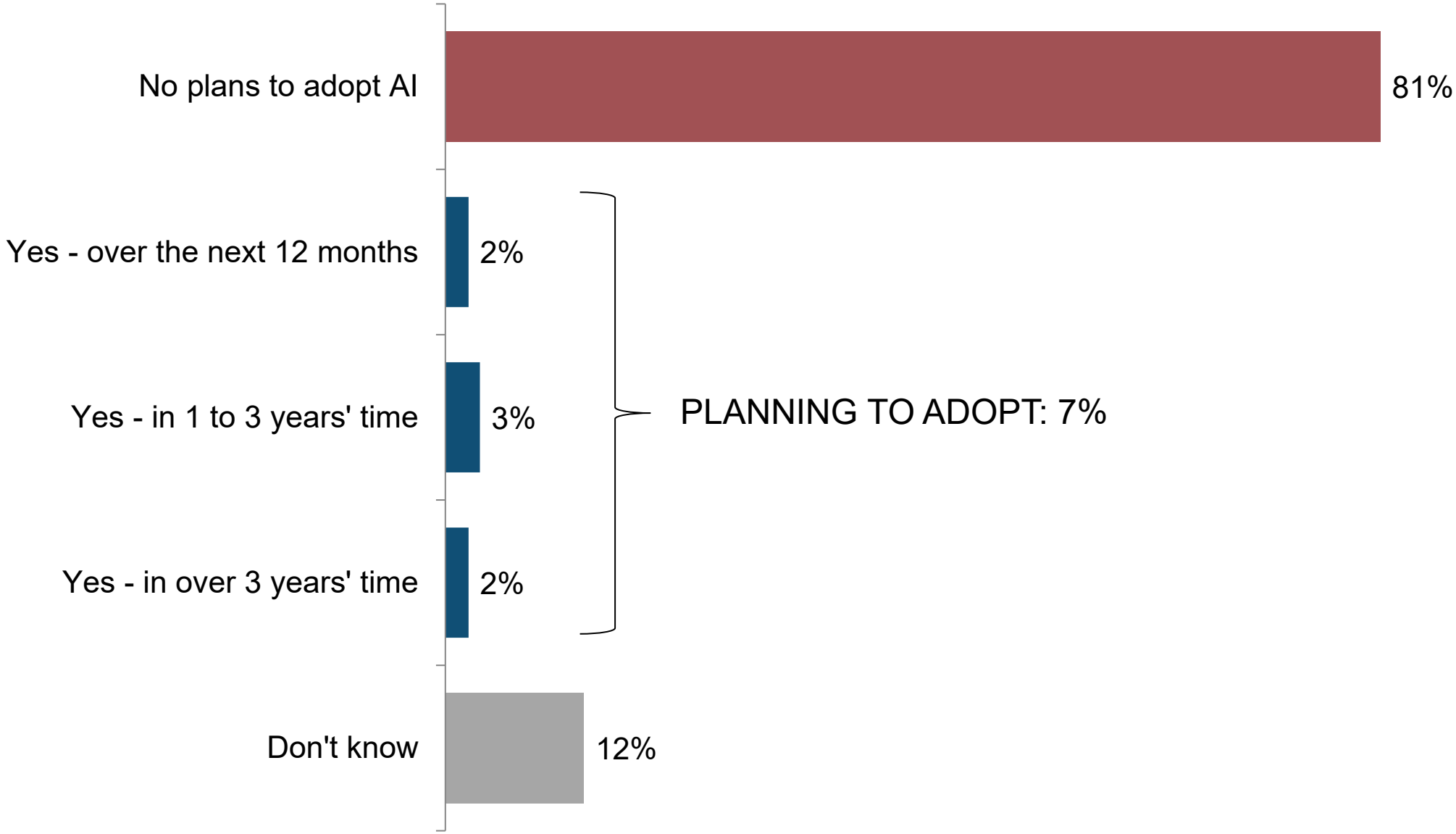
IFF Research

Employers in the Education sector were most likely to be using AI



Base: All sites in North Wales (base sizes range from 30 in Public Admin. to 269 in Wholesale and Retail).
Where base sizes are under 30 within a sector, data has been removed (denoted by a double asterisk); where base sizes are between 30 and 49, an asterisk has been included next to the data value.

Most employers not using AI had no plans to adopt it



Base: All sites in North Wales that do not use Artificial Intelligence (AI) (1,155)

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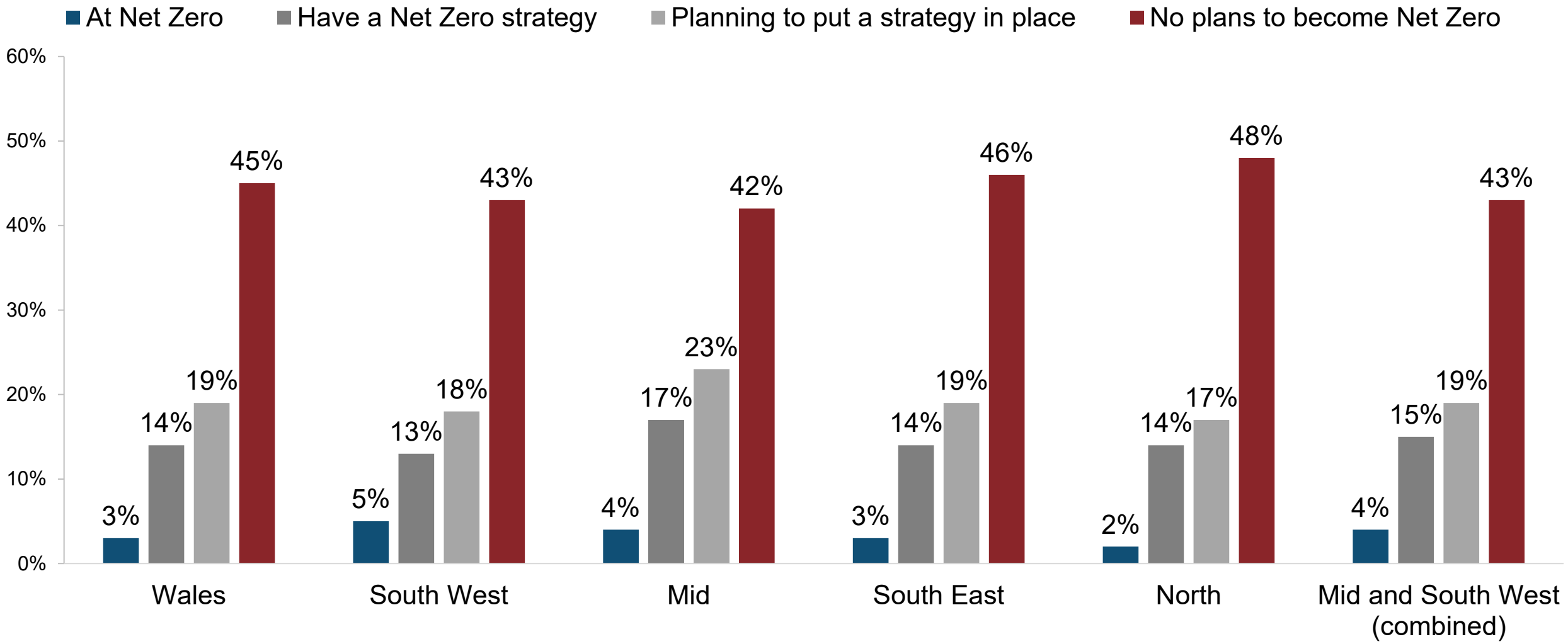
Net Zero

Department for Education

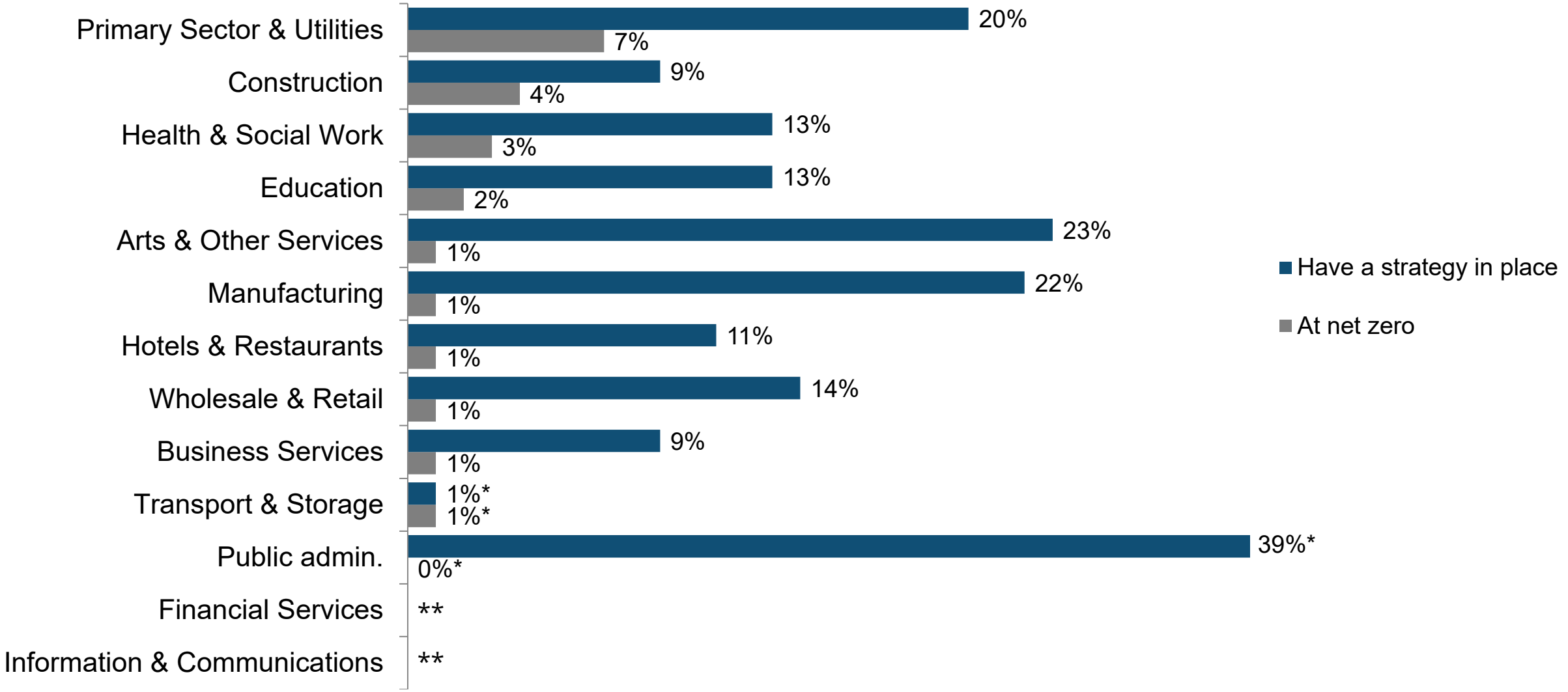
IFF Research

Employers in North Wales were more likely than all other Welsh regions to have no plans to become Net Zero



Base: All sites in Wales (5,605). Regional base size ranges from 717 in Mid Wales to 2,310 in South East Wales.

Primary Sector & Utilities employers were most likely to be at Net Zero, while Public Administration employers were most likely to have a strategy in place



Base: All sites in North Wales (1,350). Sector base sizes range from 30 in Public Admin. to 269 in Wholesale and Retail).

Where base sizes are under 30 within a sector, data has been removed (denoted by a double asterisk); where base sizes are between 30 and 49, an asterisk has been included next to the data value.

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Summary and conclusions

Department for Education

IFF Research

Summary of Findings – 1

- **ESS 2024 found a lower proportion of employers in North Wales with vacancies (16% vs. 23% in 2022)**. **Skill-shortage vacancies (SSVs) affected a smaller proportion of employers than in 2022** (6% vs. 11% in 2022), although they made up nearly a third of all vacancies (32%), as was the case in 2022 (36%).
- Among those whose hard-to-fill vacancies were all SSVs, **almost all (96%) reported that these had an impact on their organisation**, similar to the proportion in 2022 (93%). As in previous years, the most commonly reported impact was **increased workloads for other staff** (92%).
- The proportion of employers reporting skills gaps (11%) and the density of skills gaps (3.4%) **remained similar to previous years**. Both incidence and density were in line with the Wales average (12% and 3.9% respectively).
- **Employers in Hotels and Restaurants, Manufacturing and Wholesale and Retail had the highest density of skills gaps** (5.7%, 5.4% and 4.8% respectively). In line with Wales overall, **the occupation with the largest skills gap density was Elementary occupations** (6.0%)**.**
- **As in 2022, a large proportion of skills gaps were caused, at least partly, by transient causes (83%),** such as being new to the role and not having completed their training yet. For **11% of employers, skills gaps had a major impact on the organisation**, with a further 46% reporting a minor impact. The most common impact reported was an increased workload for other staff (45%). As in 2022, the most common action taken to overcome skills gaps was to **increase training activity, spending or programmes (59%)**.
- Just over a **third (35%)** of **sites in North Wales had staff who were underutilised** in their current job role, in line with 2022 (38%).

Summary of Findings – 2

- **Overall, 61% of employers that had provided training in North Wales in the last 12 months, in line with the figure for Wales as a whole (60%)** and similar to 2022 (59%). As in 2022, around two-thirds of staff in Wales had received training in 2024 (66%). Employers in North Wales had offered **the lowest number of training days per trainee** (4.9 days) of all the Welsh regions (ranging from 5.3 days to 8.0 days).

- Employers in the **Health and Social Work sector** trained the highest proportion of their staff (87%), whereas those in the Wholesale and Retail (49%) and Manufacturing (51%) sectors had trained the lowest proportions.

- **Around a fifth (16%) of North Wales employers currently have apprentices or offer apprenticeships,** in line with the Wales average (16%).

- **Primary Sector & Utilities employers (7%)** were most likely to be at net zero compared to other sectors, while the **Public Admin sector (39%)** was most likely to have a strategy in place to become net zero in North Wales.

- One in ten employers (10%) used AI, with **employers in the Education sector (25%) the most likely to do so**. Among those who did not use AI, over three-quarters (81%) had no plans to do so.

- A smaller proportion of employers in North Wales were **considered to be High Performance Working employers compared to the Wales average (4% vs. 6%).** However, this difference was less marked than in 2022 when the Wales average was higher (4% vs 9%)

Conclusions

- ESS 2024 shows that vacancies had decreased in North Wales when compared with 2022, reflecting a cooling labour market across Wales and the UK as a whole. Recruitment skills challenges in North Wales eased compared with 2022, with fewer employers reporting skill-shortage vacancies (SSVs). However, SSVs still made up nearly a third of all vacancies, mainly due to gaps in specialist skills, time management or task prioritisation skills, and problem-solving skills.
- Skills gaps remained a challenge for 11% of sites, though most were linked to transient factors such as new starters or incomplete training. Deficiencies in both people and personal skills and technical and practical skills persisted, often increasing workloads for other staff.
- Training activity in North Wales was in line with the Wales average, with 61% of employers providing training in the past year. However, the intensity of training declined, with fewer days per trainee compared to 2022. Job-specific training dominated provision, alongside health and safety and induction training. Most employers felt they were in ‘training equilibrium’, i.e. they were content with the amount of training they provide.
- Apprenticeship engagement remains steady, with 16% of employers reporting that they offered apprenticeships or currently had apprentices at the time of survey. However, future intentions had weakened, with only 22% planning to offer apprenticeships in future, compared with 32% in 2022.
- Adoption of Artificial Intelligence (AI) is still in its early stages, with 10% of employers in North Wales reporting that they currently use AI, the joint lowest proportion by region in Wales. Most employers that used AI began using it within the past year and planned to embed it more extensively into their sites operations and processes over the next three years.
- Progress towards Net Zero is limited: only 14% of employers had a strategy in place with a further 2% already at Net Zero, and nearly half had no plans to develop a Net Zero strategy.