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Employer Skills Survey 2024

Mid Wales Report

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Glossary

Site (also referred to as workplace, business, employer or site)

A single location of an organisation – for this survey all have at least two people working at that location.

Sector

Sector definitions are based on Standard Industrial Classification (SIC) 2007 codes.

Occupations

Occupational definitions are based on Standard Occupational Classification (SOC) 2020 codes.

Vacancy density

Vacancies which are proving difficult to fill, as defined by the site (from the question: “Are any of these vacancies proving hard to fill?”).

Skill-shortage vacancy (SSV)

A specific type of hard-to-fill vacancy that occurs when an employer cannot find applicants with the required skills, qualification, or experience to do a job.

SSV density

The number of SSVs as a proportion of all vacancies.

Skills gaps

Skills gaps exists when an employer thinks a worker does not have enough skills to perform their job with full proficiency. Skill gaps apply to existing employees.

Skills gaps density

The number of employees that lack full proficiency as a proportion of all employment.

Under-use of skills (skills under-utilisation)

An employee's skills are under-used / underutilised if the employer reports a person has both skills and qualifications that are more advanced than required to perform the job role they are currently in.

Off-the-job training

Training beyond that which takes place on-the-job or as part of an employee's normal work duties. It can be undertaken at the employer's premises or off the premises as long as it is funded and arranged by the employer.

On-the-job training

Training that the employer funds or arranges that takes place where the employee normally works (for example, at their desk). This would be activities recognised as training by staff rather than the sort of learning by experience which could take place all the time.

1. Introduction

1.1 Background

This document provides a summary of key findings among employers in Mid Wales from the Welsh Government and Department for Education's Employer Skills Survey (ESS 2024), a large survey of employers which provides a definitive picture of the extent, nature and impact of skills challenges faced by employers.[1]

From 2010 to 2017, ESS sat alongside the Employer Perspectives Survey (EPS) to produce insights that complemented each other. The focus on EPS was primarily outward-looking, covering provision of and engagement with the wider skills system, while ESS was more inward-looking, assessing the current skills position and skills needs of employers. Since the 2019 survey, the EPS content has been incorporated into ESS (i.e., this is the second ESS in the series to include questions formerly asked in EPS).

1.2 Methodology

The ESS 2024 questionnaire was largely consistent with 2022, in order to maintain comparability with the wider time series. However, some changes were made to cover new topic areas of policy interest - Artificial Intelligence usage and Net Zero plans. The survey population comprised individual sites with at least two employees on the payroll, meaning sole traders were excluded. The population covered employers from all sectors of the economy (private, public and third sector).

The sampling unit was at a site level, rather than at an organisation / company level. This is in recognition of the influence that local labour markets have on skill issues and the fact that skills issues are felt most acutely at the site level. Market Location, a commercial provider of employer contact details, was used as the principal sample source for ESS 2024, supplemented with 'top up' sample ordered directly from the ONS Inter-Departmental Business Register (IDBR).

Telephone interviews were conducted between June 2024 and January 2025. A total of 717 interviews were achieved with employers in Mid Wales from 5,605 achieved across Wales overall. Data was collected via Computer-Assisted Telephone

[1] The principal areas of Wales included in the 'Mid Wales' definition are: Powys and Ceredigion.

Interviewing (CATI). Employers were offered the option to be interviewed in Welsh or English.

For further information on the survey methodology, please refer to the accompanying Technical Report or the full Wales Report.

1.3 Reporting conventions

The terms ‘site’ and ‘employer’ are used interchangeably throughout this report to avoid excessive repetition.

The survey population is UK employers with employment of two or more; this means employers with at least two people working on payroll including working proprietors. When reporting volume and density measures, we typically refer to ‘employees’ throughout the report rather than employment.

All comparisons referred to in the report commentary are statistically significant at the 95% level of confidence. This applies to comparisons 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 the tables, ‘zero’ is denoted as a dash (‘-’); and an asterisk is used (‘*’) if the figure is larger than zero but less than 0.5%.

Throughout the report, 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 italicised 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 report are taken from responses by employers to the ESS 2024 survey and therefore represent their views.

2. Recruitment and external challenges

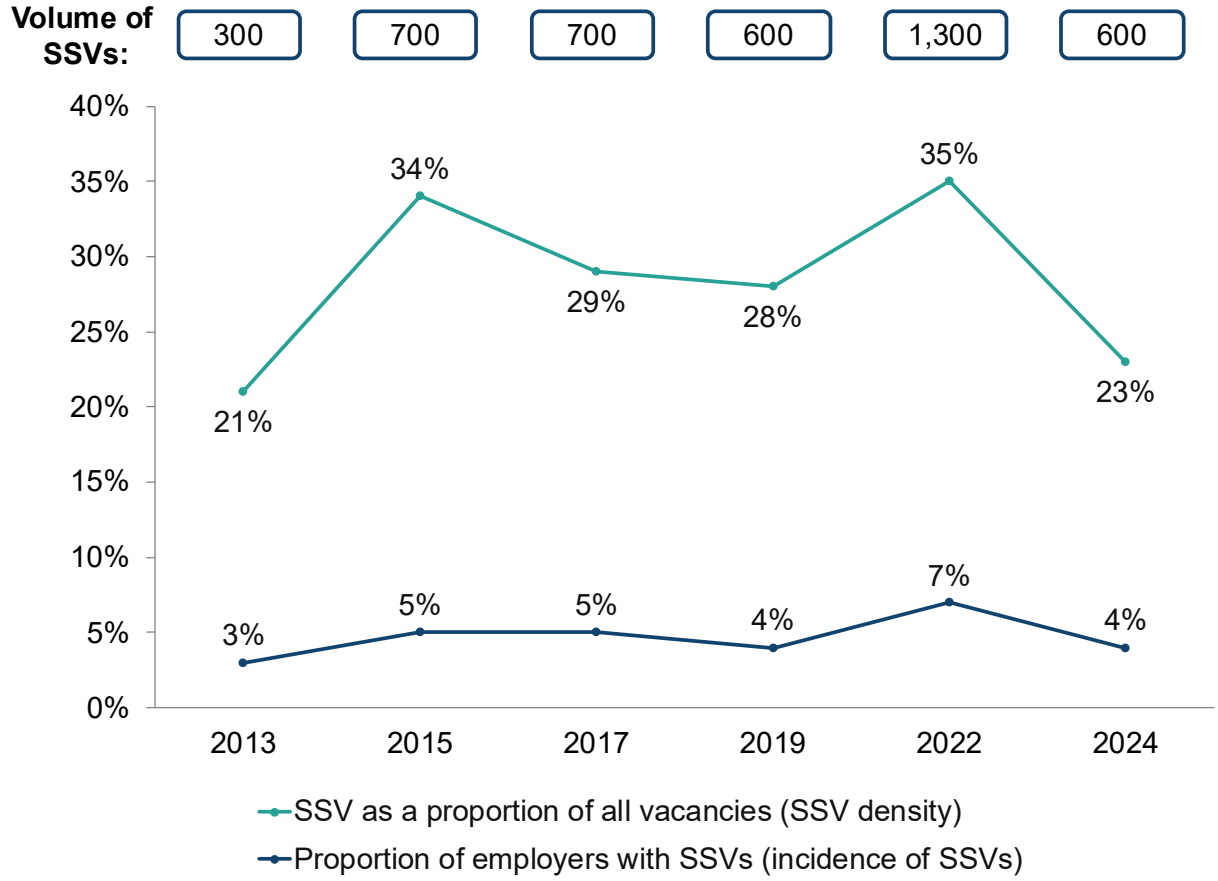
Around 1 in 8 employers (13%) in Mid Wales had vacancies at the time of the survey, the lowest proportion of all Welsh regions; the proportion across Wales overall was 17%. The proportion of employers with vacancies in Mid Wales remained consistent when compared with 2022 (16%) and 2019 (11%).

Conversely, when considering vacancies as a proportion of employment (vacancy density), vacancies were equivalent to 3.4% of employment, in line with the proportion across Wales overall (2.8%). There was no significant change in vacancy density in Mid Wales when compared with 2022 (4.6%). The volume of vacancies decreased from 3,700 in 2022 to 2,700 in 2024.

Although the majority of vacancies were not proving hard to fill due to shortages of applicants with the required skills, qualifications or experience, difficulties recruiting employees due to skill-shortages can be a significant problem for employers. A small minority of employers (4%) in Mid Wales reported having vacancies as a result of skill-shortages in applicants (skill-shortage vacancies, or ‘SSVs’), the lowest proportion in Wales (the figure was 6% across Wales overall). The incidence of SSVs decreased in Mid Wales from 7% in 2022 to 4% in 2024. This was also the case in each Welsh region and across Wales as a whole.

Around a quarter (23%) of vacancies were SSVs in Mid Wales, consistent with the figure for Wales overall (28%). The density of SSVs in 2024 (23%) decreased when compared with 2022 (35%). When considering the volume of SSVs, there were around half the number of SSVs in Mid Wales in 2024 (600) when compared with 2022 (1,300), a return to 2019 levels (also 600). A breakdown of the incidence, density and volume of SSVs in Mid Wales over time can be seen in Figure 2-1.

Figure 2-1 Incidence, density and volume of skill-shortage vacancies in Mid Wales, 2013 to 2024



Description of Figure 2-1: Line chart showing the incidence and density of SSVs over the 2013 to 2024 period, with text boxes showing the volume of SSVs over this period. Incidence and volume figures have remained largely consistent between 2015 and 2024, aside from a notable increase in both measures in 2022. SSV density saw notable fluctuations between 2013 and 2024, with a decrease between 2022 and 2024. Base: All sites in Mid Wales (2013: 717; 2015: 742; 2017: 605; 2019: 793; 2022: 694; 2024: 717).

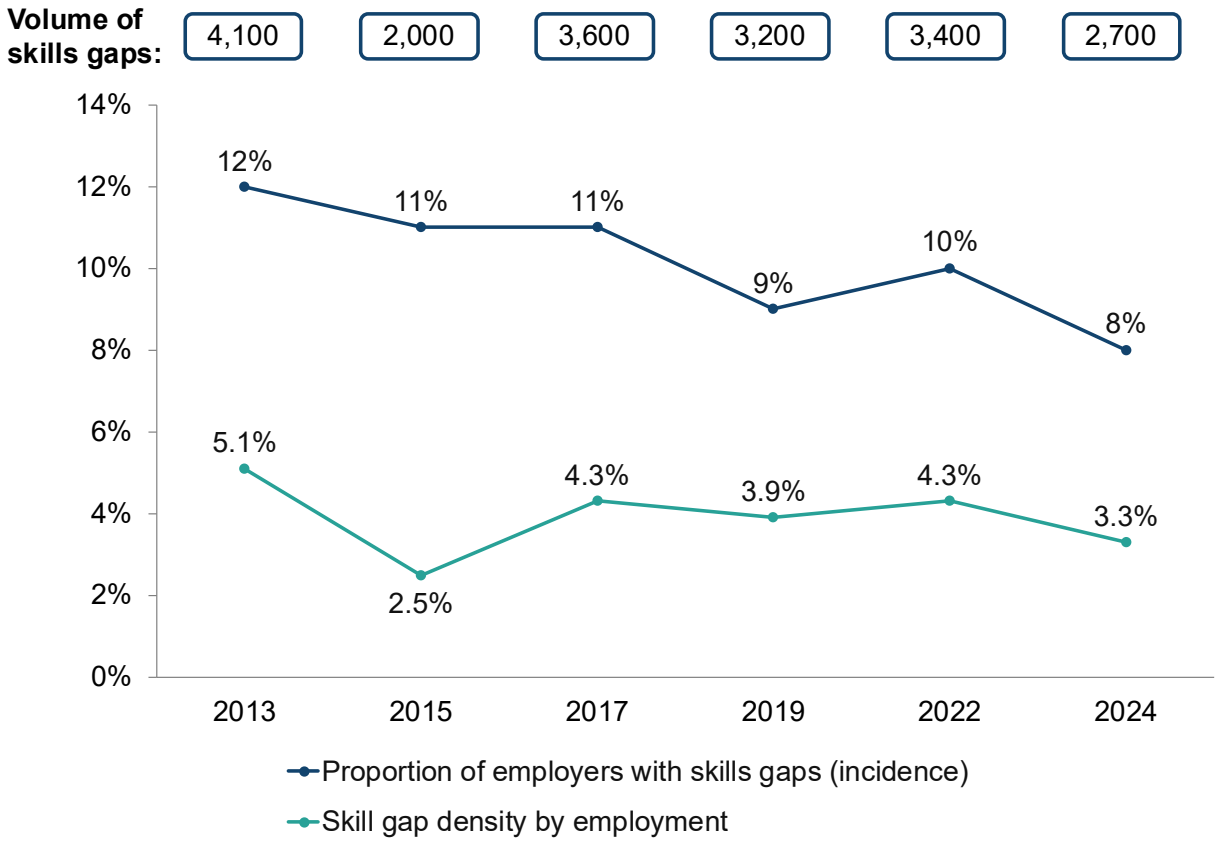
The most common skill reported to be lacking among applicants to SSVs in Mid Wales was the specialist skills or knowledge needed to perform the role (contributing to 65% of SSVs). This was consistent with 2019 and 2022. Time management and task prioritisation (38%), a lack of knowledge of products and services (38%) and creative and innovative thinking (34%) were also reported to be lacking among candidates. Compared with 2022, there was a decrease in the reported proportion of SSVs affected by the following skills: solving complex problems (from 54% in 2022 to 24% in 2024), writing instructions or guidelines (from 35% to 10%), oral Welsh language skills (36% to 11%) and more complex numerical skills (39% to 16%).

The most commonly reported detrimental impact of SSVs, as in previous years, was increased workloads for existing employees (85%). This was also the most cited impact in Wales overall (90%). Other reported impacts included difficulties meeting customer service objectives (58%), having to outsource work (49%) and a loss of business or orders to competitors (46%).

3. The internal skills challenge

Overall, 8% of sites in Mid Wales reported that they had skills gaps in their workforce (i.e. at least one member of staff not fully proficient in their role), similar to the proportion seen in both 2022 (10%) and 2019 (9%). This was the lowest proportion of any region in Wales (12% overall). The proportion of the workforce in Mid Wales not considered fully proficient (skills gap density) was consistent with the average across Wales (3.3%, compared with 3.9% overall). This proportion had not significantly changed since 2022 (4.3%). The volume of staff with skills gaps decreased from 3,400 in 2022 to 2,700 in 2024. A breakdown of the incidence, density and volume of skills gaps in Mid Wales over time can be seen in Figure 3-1.

Figure 3-2 Incidence, density and volume of skills gaps in Mid Wales, 2013 to 2024



Description of Figure 3-1: Line chart showing the incidence and density of skills gaps over the 2013 to 2024 period, with text boxes showing the volume of skills gaps in each year. Each measure decreased when compared with 2013. Base: All sites in Mid Wales (2013: 717; 2015: 742; 2017: 605; 2019: 793; 2022: 694; 2024: 717).

Most (84%) skills gaps were caused in part by factors that can be considered 'transient' causes – causes that will naturally ease over time, such as being new to

the role or training only being partially completed. This was consistent with 2022 (81%). Around 1 in 6 skills gaps (16%) were entirely due to transient causes, which is a lower proportion than Wales overall (20%). Having only partially completed training (70%) and being new to the role (70%) were the most commonly reported reasons for skills gaps in Mid Wales, followed by staff lacking motivation (50%). The proportion of skills gaps caused by the introduction of new working practices (44% in 2022 and 22% in 2024) and being unable to recruit staff with the required skills (64% in 2022 and 43% in 2024) decreased when compared with 2022. On the other hand, there was an increase in the proportion of skills gaps caused by a lack of appropriate training having been given (from 22% in 2022 to 39% in 2024) and a lack of staff motivation (from 34% to 50%).

Overall, 92% of skills gaps were reported to be caused in part by a lack of broad technical and practical skills, while 86% were caused in part by a lack of people and personal skills. The specific skills most commonly reported as lacking and contributing to skills gaps were time management and task prioritisation (66%) and team working (57%). The most common technical skill reported as lacking was the specialist skills and knowledge required to perform the role (45%), followed by a lack of knowledge about relevant products and services (44%).

As was the case for SSVs, the most commonly cited implication of skills gaps was increased workloads for other staff (53%), in line with Wales overall (50%). This was also the most common impact in 2022 (44%).

Overall, 31% of employers had underutilised staff (i.e. with qualifications and skills more advanced than required for their current jobs). This was consistent with the overall Wales result (33%). The proportion of staff who were under-utilised in Mid Wales was 13.8%, compared with 9.8% across Wales overall[footnote 2].

Around 3 in 10 (28%) of employers in Mid Wales had provided some form of work placement in the last 12 months, a similar proportion to 2022 (22%). This was also consistent with most other regions in Wales in 2024, although was lower than North Wales (36%). Work placements in Mid Wales were most commonly offered to people in education (24%); 17% offered placements to people at school, 8% offered them to

[2] Please note that this difference is not statistically significant at the 95% confidence level and should therefore be treated as indicative.

people at college, while 7% offered them to people at university.

Most employers offering some form of work placements reported doing so for altruistic reasons (67%), with giving people experience (50%) and moral reasons / benefitting young people (25%) being the most commonly cited altruistic reasons. Among those that did not offer work placements or other work-related experiences, the most commonly reported reasons for not doing so were structural reasons (63%), including not having suitable roles (28%).

4. Training and workforce development

Around half (52%) of employers in Mid Wales reported that they had arranged or funded training for their staff in the last 12 months. This was the lowest proportion across of any Welsh region in 2024 (60% across Wales overall). On-the-job training (40%) was more commonly offered than off-the-job training (34%) in Mid Wales, a finding consistent with other regions. The proportions offering both on- and off-the-job training were relatively consistent with 2022 (42% and 29% respectively).

The proportion of staff reported to have received training in the last 12 months in Mid Wales was 67%, which was consistent with the proportion seen across Wales as a whole (64%), although a higher proportion when compared with the figure for Mid Wales in 2022 (61%).

Among those that had not provided training in the last 12 months in Mid Wales, the stand out reason for not doing so, as was the case across Wales, was that staff were already considered to be fully proficient (68%), a similar proportion to 2022 (64%).

Table 4-1 Proportion of employers that trained staff and the proportion of staff trained over the previous 12 months in Wales and the Welsh regions, 2015 to 2024

	Employers that train (%) 2015	Staff trained (%) 2015	Employers that train (%) 2017	Staff trained (%) 2017	Employers that train (%) 2019	Staff trained (%) 2019	Employers that train (%) 2022	Staff trained (%) 2022	Employers that train (%) 2024	Staff trained (%) 2024
Wales	**63%**	**64%**	**62%**	**58%**	**62%**	**65%**	**60%**	**63%**	**60%**	**64%**
Mid Wales	54%	71%	58%	67%	58%	57%	49%	61%	52%	67%
North Wales	66%	60%	61%	55%	63%	68%	59%	65%	61%	66%
Mid / South West	59%	65%	62%	59%	60%	62%	55%	63%	55%	63%
South East Wales	66%	65%	62%	58%	64%	65%	63%	61%	64%	64%
South West Wales	61%	63%	64%	56%	61%	64%	59%	63%	57%	61%

Base: All sites in Wales in 2024 (5,605); All sites in Mid Wales in 2024 (717). Other base sizes are shown in Annex A: Base Sizes.

Overall, 54,000 staff were trained in Mid Wales for a total of 315,000 training days in the past 12 months. This equated to 5.8 training days per person trained per year ('per trainee'), and 3.9 days per employee (compared to 6.6 days per trainee and 4.2 days per employee in Wales overall). These results represent slight increases from 2022 levels in Mid Wales, when 5.2 training days were provided per trainee per year and 3.2 days per employee per year.

The most common type of training offered to employees by employers that provided training in Mid Wales was job specific training (82%), followed by health and safety or first aid training (77%) and basic induction training for new staff (59%). Despite this aligning with the top three most common types of training across Wales overall, employers in Mid Wales were the least likely in Wales to offer job specific training (82% vs. 85% across Wales) or basic induction training (59% vs. 64%). They were also least likely to offer training in new technology (41% vs 46% overall in Wales), more extensive induction training (31% vs 37%), management training (28% vs 33%) and supervisory training (24% vs 33%).

Six in 10 (60%) employers reported that they were in 'training equilibrium', meaning they undertook the amount of training over the previous 12 months that they wanted, which was relatively consistent with the overall figure across Wales (57%). This means that 40% of employers wanted to deliver more training than they had done over the past 12 months.

5. Apprenticeships

A small minority of employers (6%) had apprentices as employees, while 8% offered apprenticeships but did not have any apprentices, at the time of the survey. Overall, around 1 in 7 (14%) employers in Mid Wales had apprentices or offered apprenticeships. This was consistent with other Welsh regions (16% overall across Wales) and the 2022 figure for Mid Wales (9%).

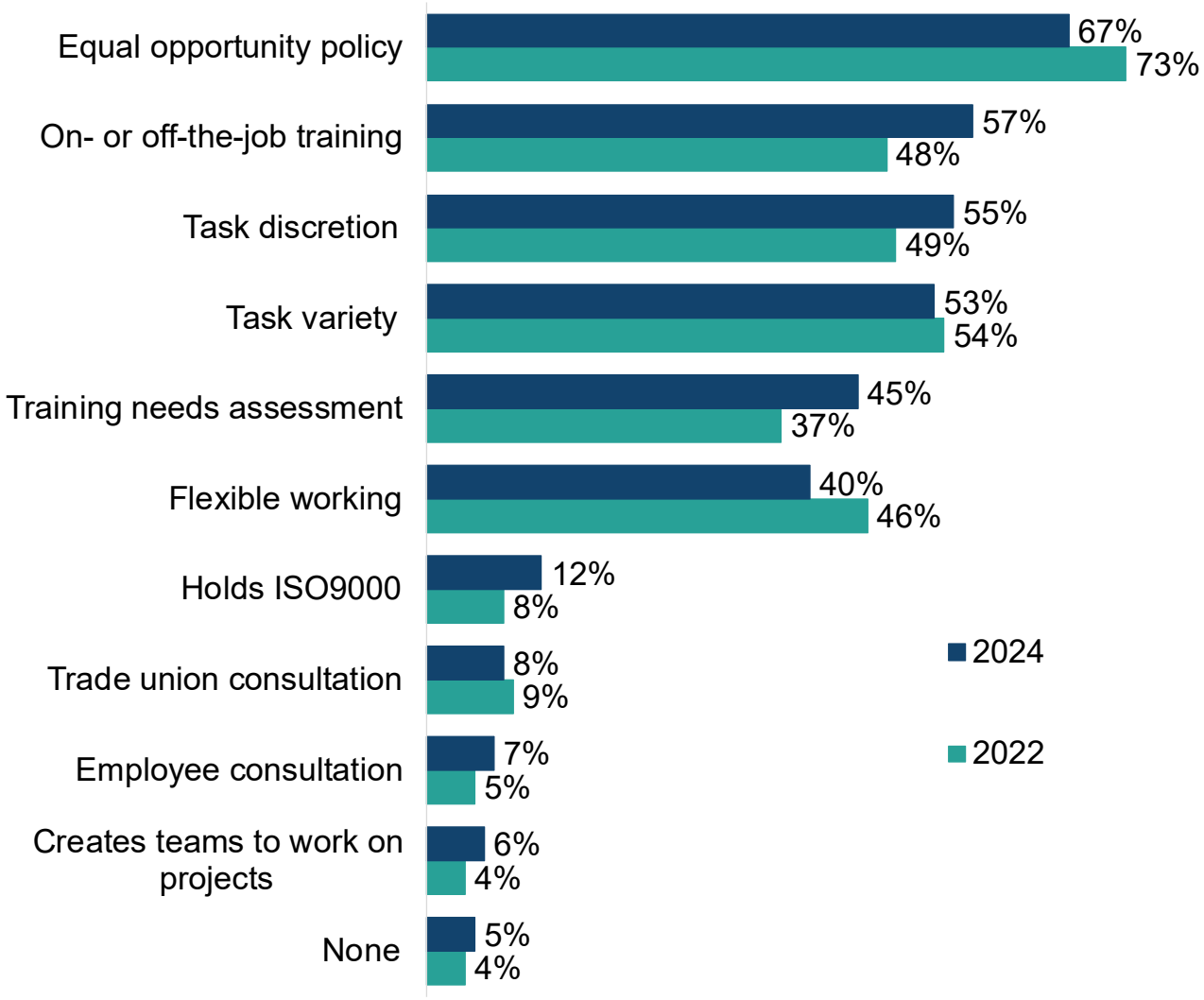
Around 1 in 6 employers (17%) in Mid Wales planned to offer apprenticeships in the future, the lowest proportion by region in Wales. This was a notable decrease when compared with 2022 (27%), which was reflected across Wales and the rest of the UK.

6. High performance working practices

Just 6% of employers in Mid Wales qualified as High Performance Working (HPW) employers, meaning they adopted 7 out of the 10 High Performance Working practices that were included in the survey. This was the same proportion of HPW employers when compared with Wales overall.

The most common HPW practice implemented by employers was having an equal opportunity policy (67%), followed by on- or off-the-job training (57%), task discretion (55%) and task variety (53%). Despite being the most common HPW practices in Mid Wales, a lower proportion of employers in Mid Wales had an equal opportunity policy compared to overall levels in Wales (67% compared with 78% overall), but a higher proportion offered task discretion (55% vs 45%) in Mid Wales. The prevalence of HPW practices in Mid Wales was broadly in line with 2022, as shown in Figure 6-1 (which shows the prevalence of HPW practices among employers in Mid Wales over time).

Figure 6-3 Prevalence of High Performance Working Practices in Mid Wales, 2022 to 2024



Description of Figure 6-1: Bar chart showing the prevalence of high performance working practices among employers in Mid Wales over the period 2022 to 2024. In both years, having an equal opportunity policy was the most common HPW practice. Base: All sites in Mid Wales in Module D (2022: 162; 2024: 190).

7. Artificial Intelligence

In order to understand how employers are engaging with Artificial Intelligence (AI), new questions were introduced in the 2024 survey which asked employers about their use of AI.

One in 10 (10%) employers in Mid Wales said their site currently uses AI. This was relatively consistent with other Welsh regions (12% across Wales overall).

Among those sites currently using AI, 7 in 10 (70%) had started using it in the past 12 months, around 1 in 6 (17%) had been using it for 1 to 3 years, while 9% had been using it for more than 3 years. This was largely consistent with the speed of adoption across Wales overall (66% within the last 12 months, 21% from 1 to 3 years ago and 10% over 3 years ago). Most (85%) said they would be embedding AI into their site's processes and operations over the next 3 years, a proportion consistent across Wales (86% overall).

Of those sites not using AI, most (85%) had no plans to adopt it. This was the highest proportion across Welsh regions and compared to Wales overall (80%).

8. Net Zero

A new question was asked in the 2024 survey regarding an employer's Net Zero strategy. Being 'a Net Zero site' means that the site's carbon emissions are equal to, or less than, the amount of carbon being removed from the atmosphere by the site.

Employers in Mid Wales were asked whether they had a Net Zero strategy in place. Overall, around 1 in 6 (17%) employers had a strategy in place, which was the highest proportion across Welsh regions (14% across Wales, overall). A further 4% said they were already at Net Zero. Nearly a quarter of employers (23%) did not have a strategy in place currently but were planning to do so, which was also higher than average across Wales (19% overall). Around 1 in 7 (14%) were unsure of their Net Zero plans, while 42% had no plans to become Net Zero.

9. Conclusions

Mid Wales had the lowest proportion of employers reporting vacancies across all Welsh regions, and levels of vacancies have remained relatively consistent in the region since 2019. Challenges around the skills supply had lessened in Mid Wales since 2022, with the proportion of vacancies which were skill-shortage vacancies (SSVs) decreasing from 35% in 2022 to 23% in 2024.

In terms of the internal skills picture, the proportion of employers with skills gaps was lower in Mid Wales than across Wales overall. Skills challenges continued to be detrimental to employers in Mid Wales, with the most commonly reported impact continuing to be an increased workload for the existing workforce, which is consistent with employers across Wales and the UK.

Training and workforce development can be a means of addressing skills challenges. A lower proportion of employers in Mid Wales (52%) reported arranging or funding training for their staff in the last 12 months compared to other regions in Wales (60% across Wales overall). It remained the case that many employers did not feel their staff required training as they are already fully proficient.

The proportion of employers who had apprentices, or offered apprenticeships, was largely consistent with levels across Wales and with 2022 in Mid Wales. However, a lower proportion reported that they plan to offer them in the future when compared to 2022, a trend seen across other regions in Wales and the UK.

Looking at employer practices, a minority in Mid Wales were considered to be High Performance Working (HPW) employers. One in 10 (10%) employers in Mid Wales said their site currently uses AI, in line with the proportion across other Welsh regions, and around 1 in 6 employers (17%) had a Net Zero strategy in place, the highest proportion by region.

Key findings

	Mid Wales 2019	Mid Wales 2022	Mid Wales 2024	Wales 2019	Wales 2022	Wales 2024
Vacancies and skill-shortage vacancies (SSVs)						
% of sites with any vacancies	11%	16%	13%	15%	22%	17%
% of sites with any hard-to-fill vacancies	5%	11%	7%	7%	15%	9%
% of sites with SSVs	4%	7%	4%	5%	10%	6%
% of all vacancies that are SSVs	28%	35%	23%	24%	35%	28%
Number of vacancies	1,900	3,700	2,700	40,800	58,900	35,700
Number of skill-shortage vacancies	600	1,300	600	9,800	20,600	10,100
Skills gaps						
% of sites with any staff not fully proficient	9%	10%	8%	13%	14%	12%
Number of staff not fully proficient	3,200	3,400	2,700	50,900	51,500	50,400
% of staff not fully proficient	3.9%	4.3%	3.3%	4.0%	4.1%	3.9%
Training						
% of sites training any staff over the last 12 months	58%	49%	52%	62%	60%	60%
% of sites providing off-the-job training in the last 12 months	43%	29%	34%	45%	36%	40%
% of workforce trained	57%	61%	67%	65%	63%	64%
Total days training	0.3m	0.3m	0.3m	4.2m	5.3m	5.4m
Training days per trainee	6.4	5.2	5.8	5.1	6.8	6.6
Training days per employee	3.6	3.2	3.9	3.3	4.2	4.2
Apprenticeships						
% of employers who currently had apprentices on site or offered apprenticeships	17%	9%	14%	16%	17%	16%

% of employers planning to offer apprenticeships in the future	25%	27%	17%	27%	35%	24%

Annex A: Base Sizes

Unweighted base sizes for all sites in Wales (2013 to 2024)

	2013	2015	2017	2019	2022	2024
Wales	**5,996**	**6,027**	**5,913**	**6,773**	**4,825**	**5,605**
Region						
North Wales	1,580	1,528	1,584	1,666	1,193	1,350
Mid Wales	717	742	605	793	694	717
South East Wales	2,400	2,395	2,603	2,767	1,911	2,310
South West Wales	1,299	1,362	1,121	1,547	1,027	1,228
Mid / South West Wales	2,016	2,104	1,726	2,340	1,721	1,945