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Employer Skills Survey 2024

North 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 North 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 1,350 interviews were achieved with employers in North Wales from 5,605 achieved across Wales overall. Data was collected via Computer-Assisted

[1] The principal areas of Wales included in the 'North Wales' definition are: Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire and Wrexham.

Telephone 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

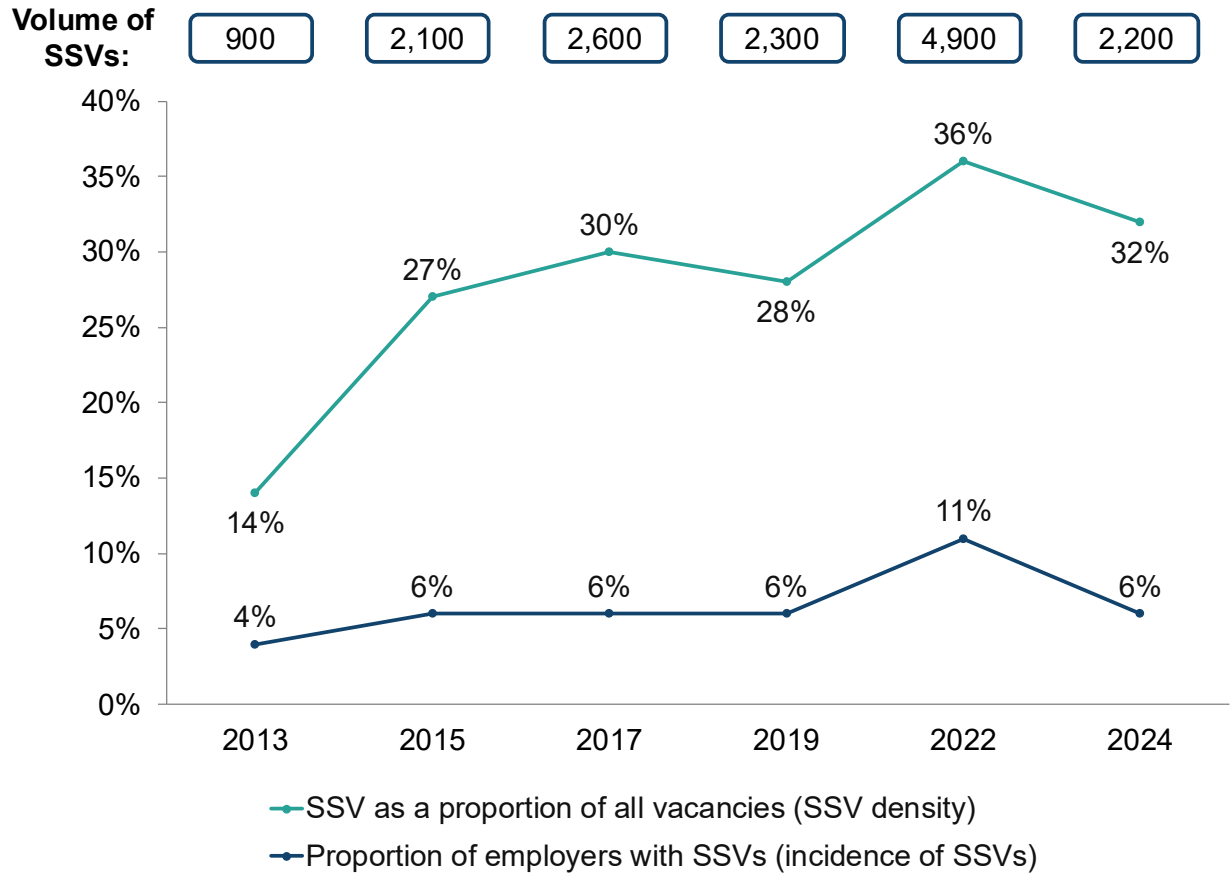
Around 1 in 6 employers (16%) in North Wales reported having vacancies at the time of survey, similar to the proportion across Wales overall (17%). The proportion of employers with vacancies in North Wales had decreased compared with 2022 (23%), returning to the proportion seen in 2019 (16%).

When considering vacancies as a proportion of employment (vacancy density), there was around one vacancy for every 40 employees (2.4%), which was in line with the proportion across Wales (2.8%). Vacancy density in North Wales was lower than in 2022 (4.7%). The volume of vacancies almost halved from 13,400 in 2022 to 7,000 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 (6%) of employers in North Wales reported having vacancies as a result of skill-shortages in applicants (skill-shortage vacancies, or ‘SSVs’), the same proportion as Wales overall (6%). However, the incidence of reported SSVs in North Wales was lower when compared with 2022 (6% vs. 11% in 2022), as was the case in each Welsh region and the nation as a whole.

Around a third (32%) of vacancies were SSVs in North Wales, in line with the figure for Wales overall (28%). The density of SSVs in 2024 did not mark a significant change when compared with 2022 (36%). The number of SSVs in North Wales in 2024 (2,200) more than halved when compared with 2022 (4,900). A breakdown of the incidence, density and volume of SSVs in North Wales over time can be seen in Figure 2-1.

Figure 2-1 Incidence, density and volume of skill-shortage vacancies in North 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. The chart shows an increase in each measure between 2013 and 2015. Since 2015, results for each measure have remained consistent, with the exception being a sharp increase in 2022. Base: All sites in North Wales (2013: 1,580; 2015: 1,528; 2017: 1,584; 2019: 1,666; 2022: 1,193; 2024: 1,350).

The most common skill reported to be lacking among applicants to SSVs in North Wales, as in 2019 and 2022, was specialist skills or knowledge needed to perform the role (contributing to 62% of SSVs). This was followed by the inability of applicants to manage their own time and prioritise tasks (48%) and solve complex problems (42%). Some individual skills reported as lacking and affecting SSVs had increased in prevalence since 2022; these included complex numerical skills and understanding (32% of SSVs vs. 16% in 2022), ability to manage one's own feelings and those of others (41% vs. 28%), manual dexterity (32% vs. 19%) and persuading and influencing others (27% vs. 15%).

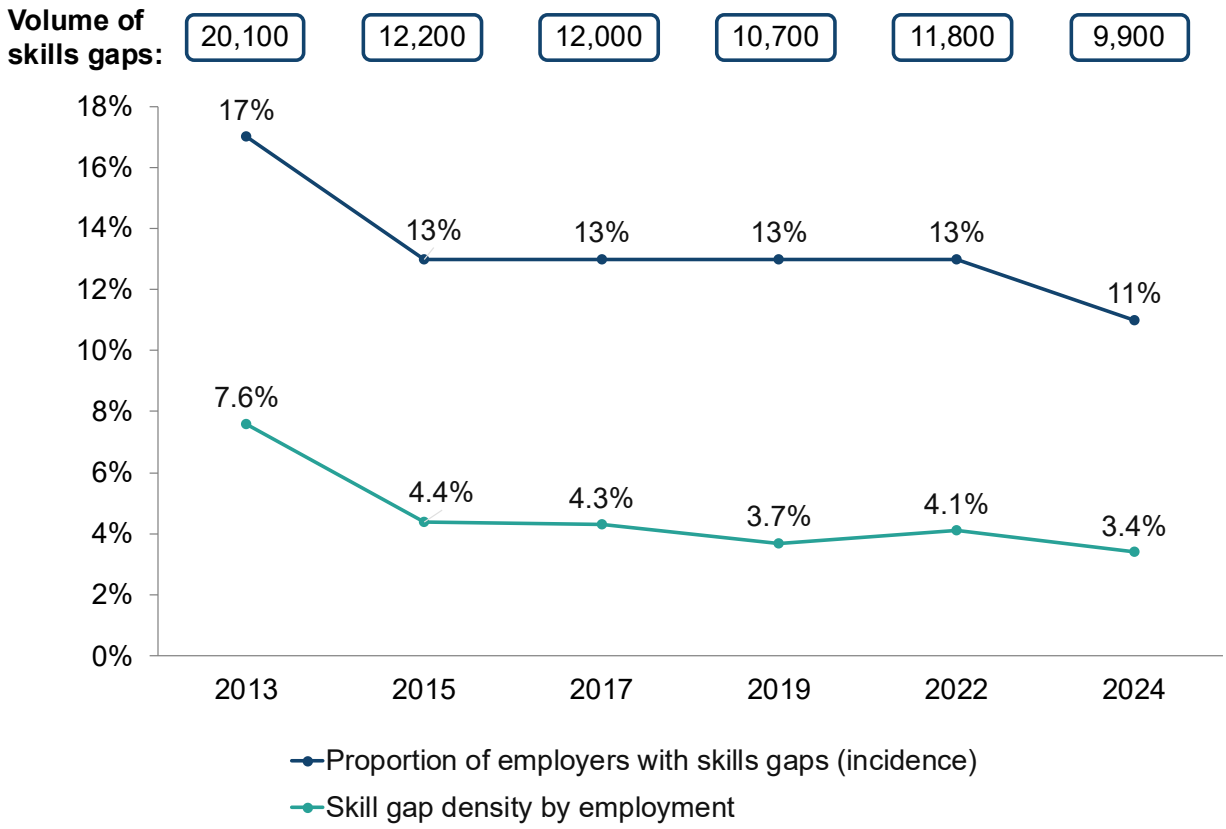
By far the most commonly reported detrimental impact of SSVs, as in previous years, was increased workloads for existing employees (92%), consistent with the

proportion across Wales (90%). Other reported impacts included increased operating costs (56%), delays in developing new products or services (47%) and having to outsource work (41%).

3. The internal skills challenge

Overall, 11% of sites in North Wales reported that they had skills gaps within their workforce (i.e. at least one member of staff not fully proficient in their role), similar to 2022 (13%). The proportion with skills gaps in North Wales was similar to the Wales average (12%). The proportion of the workforce in North Wales not considered fully proficient (3.4%) was consistent with the Wales average (3.9%). The volume of staff with skills gaps decreased from the level seen in 2022 (9,900 in 2024 vs. 11,800 in 2022). A breakdown of the incidence, density and volume of skills gaps in North Wales over time can be seen in Figure 3-1.

Figure 3-2 Incidence, density and volume of skills gaps in North 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, although the volume of skills gaps increased in 2022 before decreasing again in 2024. Base: All sites in North Wales (2013: 1,580; 2015: 1,528; 2017: 1,584; 2019: 1,666; 2022: 1,193; 2024: 1,350).

Most skills gaps (83%) 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. Over a quarter of skills gaps (27%) were entirely due to transient causes, showing an increase from 2022 (14%). Being new to the role contributed to 73% of skills gaps, while training only being partially completed contributed to 67%. These were also the two most commonly reported causes of skills gaps in 2022 (66% and 65% respectively).

The skills most commonly reported as lacking and contributing to skills gaps in North Wales were time management and prioritisation skills (67%) and team working (47%). The most common technical skill reported as lacking was the specialist skills and knowledge required to perform the role (51%)..

As was the case for SSVs, the most commonly reported implication of skills gaps was increased workload for other staff (45%). This was also the most common impact reported in 2022 (56%).

Overall, 35% of employers had staff 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 said to be under-utilising their skills and qualifications in their job role, in North Wales was 6.4% compared with 9.8% across Wales as a whole[footnote 2].

Over a third (36%) of employers in North Wales had provided some form of work placement in the last 12 months, a higher proportion than in 2022 (28%). This was also consistent with most other regions in Wales in 2024, although higher than Mid Wales (28%). Work placements in North Wales were most commonly offered to people in education (29%); 15% offered placements to people at school, 16% offered them to people at college, while 8% offered them to people at university. The proportion offering education placements in North Wales was higher when compared with Wales overall (29% vs. 24%).

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

Most employers offering some form of work placements reported doing so for altruistic reasons (58%), with giving people experience (41%) and moral reasons / benefitting young people (26%) 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 (56%), including not having the time or resources to manage placements (19%).

4. Training and workforce development

More than 6 in 10 employers (61%) in North Wales said they had arranged or funded training for their staff in the last 12 months, similar to the proportion across Wales (60% across Wales overall). On-the-job training was more commonly offered than off-the-job training in North Wales (50% compared to 39%); the proportion offering off-the job and on-the job training was consistent with 2022 (49% and 37% respectively).

The proportion of staff that received training in the last 12 months in North Wales was 66%, similar to the proportion seen across Wales as a whole (64%). This did not mark a significant change when compared with the proportion seen in North Wales in 2022 (65%).

Among those that had not provided training in the last 12 months or so, the stand out reason for not doing so, as the case across Wales, was that staff were already considered to be fully proficient (68%), a similar proportion to 2022 (65%).

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%**
North Wales	66%	60%	61%	55%	63%	68%	59%	65%	61%	66%
Mid Wales	54%	71%	58%	67%	58%	57%	49%	61%	52%	67%
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 North Wales in 2024 (1,350). Other base sizes are shown Annex A.

Overall, 192,000 staff were trained in North Wales for a total of 947,000 training days in the past 12 months. This equated to 4.9 training days per person trained per year ('per trainee'), and 3.3 days per employee (compared to 6.6 days per trainee and 4.2 days per employee in Wales overall). The number of training days per trainee was the lowest in North Wales out of all Welsh regions. The results also represent decreases from 2022 levels, when 6.9 training days were provided per trainee per year and 4.5 days per employee per year in North Wales.

The most common type of training offered to employees by employers that provided training was job specific training (84%) followed by health and safety or first aid training (77%) and basic induction training for new staff (60%).

Nearly 6 in 10 (58%) employers reported that they were in 'training equilibrium', meaning they undertook the amount of training over the previous 12 months that they wanted, similar to the overall proportion in Wales as a whole (57%). This means that 42% of employers wanted to deliver more training than they had done over the last 12 months.

5. Apprenticeships

Just under 1 in 10 employers (8%) had apprentices as employees at the time of the survey, while another 8% offered apprenticeships but did not have any apprentices. Taken together, 1 in 6 employers in North Wales (16%) had apprentices or offered apprenticeships, in line with that seen in Wales overall (16%) and similar to the proportion in North Wales in 2022 (18%).

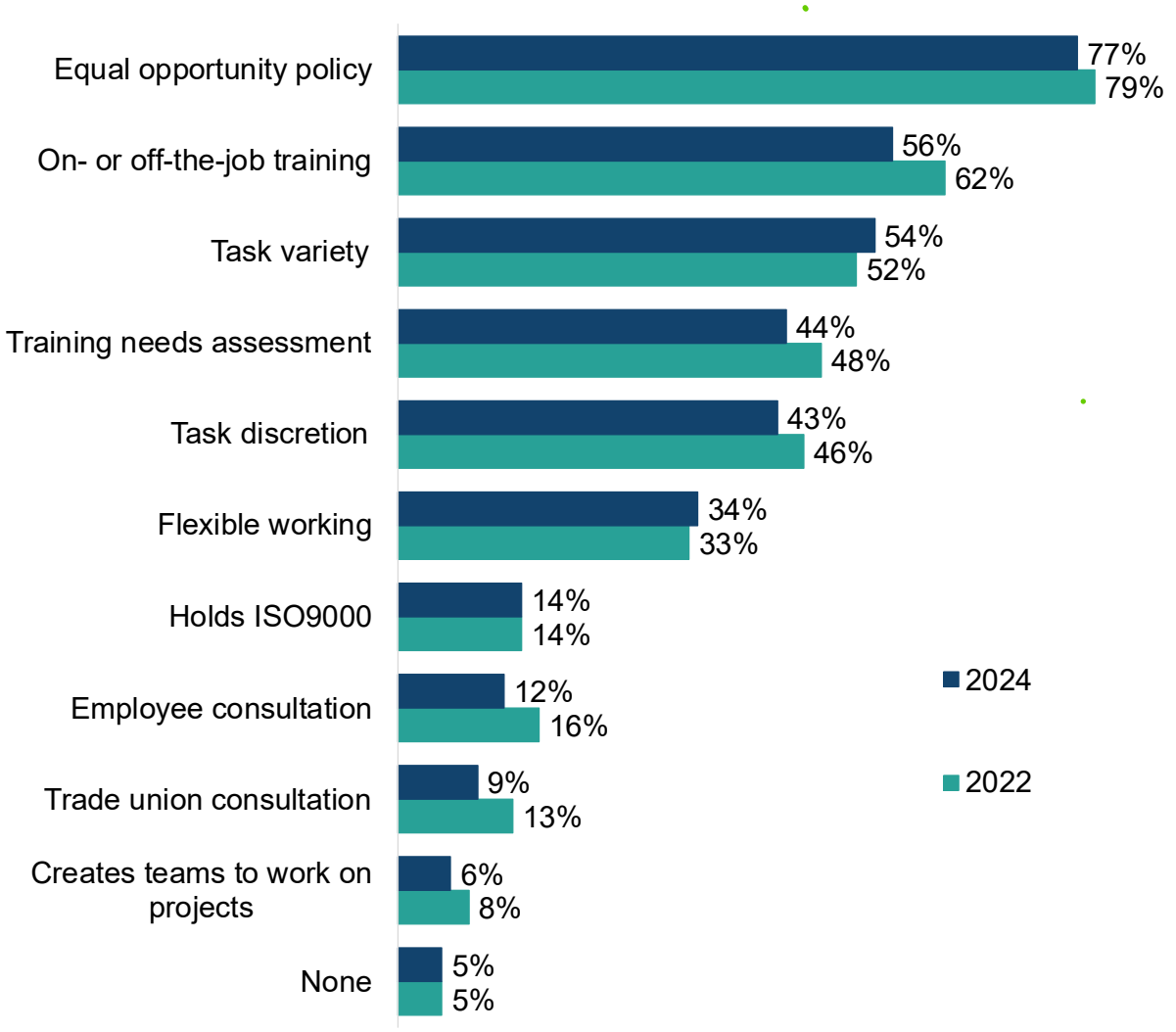
Just over 1 in 5 (22%) employers in North Wales planned to offer apprenticeships in the future. This was a notably lower proportion than in 2022 (32%), a decrease that was reflected across Wales and the rest of the UK.

6. High performance working practices

A minority of employers (4%) in North 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 slightly lower than the proportion of HPW employers across Wales as a whole (6%).

The most common HPW practice implemented by employers was having an equal opportunity policy (77%, similar to 78% in Wales overall) followed by on- or off-the-job training (56%) and task variety (54%). The prevalence of HPW practices in North Wales was broadly in line with 2022. Figure 6-1 shows the prevalence of HPW practices among employers in North Wales over time.

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



Description of Figure 6-1: Bar chart showing the prevalence of high performance working practices among employers in North 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 North Wales in Module D: 2024:328; 2022: 288.

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.

Overall, 1 in 10 employers in North Wales (10%) said their site currently uses AI. This was amongst the lowest proportion in Wales along with Mid Wales (12% across Wales overall).

Among those sites currently using AI, almost three quarters (73%) had started using it in the past 12 months, 1 in 6 (16%) had been using it for 1 to 3 years, while about 1 in 12 (8%) had been using it for more than 3 years. Compared with other sites in Wales, those in the North were most likely to have adopted it in the past 12 months (73% vs. 66% in Wales overall). Most (90%) said they would be embedding AI into their site's processes and operations over the next 3 years, the highest proportion seen across Wales (86% in Wales overall).

Of those sites not using AI, most (81%) had no plans to adopt it, similar to the proportion across Wales overall (80%).

8. Net Zero

A new question was asked in the 2024 survey that asked employers about their 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 North Wales were asked whether they had a Net Zero strategy in place. Overall, 1 in 7 employers (14%) had a strategy in place, while a further 2% said they were already at Net Zero. Around 1 in 6 employers (17%) did not have a strategy in place currently but were planning to do so. Under half (48%) of employers had no plans to become Net Zero; this was the highest proportion seen across all Welsh regions (45% in Wales overall). A sizeable proportion (19%) were also unsure about their Net Zero plans. This proportion was consistent with those seen across Wales overall.

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 dominates 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 have weakened, with only 22% planning to offer apprenticeships compared to 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.

Key findings

	North Wales 2019	North Wales 2022	North Wales 2024	Wales 2019	Wales 2022	Wales 2024
Vacancies and skill-shortage vacancies (SSVs)						
% of sites with any vacancies	16%	23%	16%	15%	22%	17%
% of sites with any hard-to-fill vacancies	8%	17%	9%	7%	15%	9%
% of sites with SSVs	6%	11%	6%	5%	10%	6%
% of all vacancies that are SSVs	28%	36%	32%	24%	35%	28%
Number of vacancies	8,400	13,400	7,000	40,800	58,900	35,700
Number of skill-shortage vacancies	2,300	4,900	2,200	9,800	20,600	10,100
Skills gaps						
% of sites with any staff not fully proficient	13%	13%	11%	13%	14%	12%
Number of staff not fully proficient	10,700	11,800	9,900	50,900	51,500	50,400
% of staff not fully proficient	3.7%	4.1%	3.4%	4.0%	4.1%	3.9%
Training						
% of sites training any staff over the last 12 months	63%	59%	61%	62%	60%	60%
% of sites providing off-the-job training in the last 12 months	46%	37%	39%	45%	36%	40%
% of workforce trained	68%	65%	66%	65%	63%	64%
Total days training	1.1m	1.3m	0.9m	4.2m	5.3m	5.4m
Training days per trainee	5.5	6.9	4.9	5.1	6.8	6.6
Training days per employee	3.7	4.5	3.3	3.3	4.2	4.2
Apprenticeships						
% of employers who currently had apprentices on site or offered apprenticeships	14%	18%	16%	16%	17%	16%

% of employers planning to offer apprenticeships in the future	25%	32%	22%	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