



Regional Learning and Skills Partnership
Partneriaeth Dysgu a Sgiliau Rhanbarthol

De-Orllewin Cymru
South West Wales



Ariennir yn Rhannol gan
Lywodraeth Cymru
Part Funded by
Welsh Government

South West Wales **Employment and Skills Plan** **2022-2025**

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Introduction

The Regional Learning and Skills Partnership (RLSP) brings together industry partners from all sectors along with training/education providers to develop a strategic partnership to enhance and promote skills and training in the region, specifically to meet the demand of employers both now and in the future. The knowledge, expertise and commitment of all the Board members, industry cluster groups, the training provider group and the wider business community who support the RLSP. Ensure that we can develop those critical skills in line with demand; emerging technologies and new industries on the horizon.

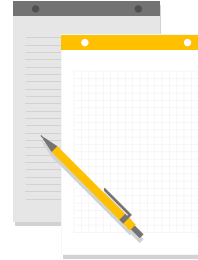
The three year Employment and Skills plan has been developed in conjunction with employers, training providers and school leaders to inform Welsh Government on the future skills needs of the region with an aim to influence the Welsh Government's planning and funding of post 16 education through full time courses and apprenticeships. The plan contains key actions on training needs, including the emerging technologies to meet the net zero agenda.

Change is happening rapidly and since launching the last Employment and Skills Plan in 2019 there have been major changes across the World. The post covid landscape for skills has changed the way in which individuals now receive training; there has been a clear shift in the training requirements specifically around digital technology and there has been an increased demand for apprenticeships and work experience opportunities as we emerge from a world of hybrid working. Recruitment remains a major challenge for many sectors with many facing economic difficulty as jobs remain unfilled. This is compounded by the current cost of living crisis and the challenge of delivering on the climate change agenda, all of which impact on the productivity of businesses. However, skills remain a priority for business and this Plan details the priority areas that need to be addressed to ensure that we develop the workforce for the future. There are many opportunities for the region ahead through the City Deal and other large scale projects that will bring investment into the region together with the higher paid jobs that the area needs. I would like to thank the RLSP Board members; the Industry Cluster groups and the training providers for their continued support and invaluable contribution to the work of the RLSP. I would encourage all businesses to become involved with the work of the Board to ensure that we can deliver not only the actions contained within this Plan but that we develop the workforce that businesses need by having the right skills delivered in our region raise awareness of the future skills that each individual business and the region requires to ensure that businesses in the region have the ability to compete for the opportunities that will be generated through new technology.



Edward Morgan

Chair of Regional Learning and Skills Partnership



Policy Landscape



Policy Landscape - Employability and Skills

• Stronger Fairer Greener Wales Future Generations

Young Persons Guarantee to make it easy for everyone under the age of 25 to access an offer of work, education, training, or self-employment. The offer includes the young people who will benefit from the Governments 125,000 new Apprenticeship programme to give people of all ages high quality routes into better jobs

• Tackling economic inequality

Prioritise and consolidate Welsh Government led, national employability support to ensure sure no one is left behind. Targeting those under-represented in the labour market, those in and out of work with long term health conditions, to find work and progress in employment. Whilst strengthening joint working with DWP to optimise national provision to meet the needs of priority groups.

• Fair Work for all

Support and encourage employers to create high quality employment, improve the offer to workers, champion fair employment practices, ensure the social value of investment and encourage the public sector to embed the priorities in workforce planning

• Healthy Work, Healthy Wales

Support people with a long term health condition to work by preventing people falling out of employment through health prevention, early intervention, healthy workplaces and maximise role of the health service as an anchor employer.

• Learning for Life

Ensure educational inequalities narrow and standards rise, participation in the skills system is widened for disabled people and ethnic minority groups, whilst tackling low qualifications and increasing the mobility workers

National Milestones

In December 2021, the first set of National Milestones were published. The national milestones are a series of measures against the national indicators that set out the longer term expectations.

- 75% of working age adults in Wales will be qualified to Level 3 or higher by 2050
- The percentage of working age adults with no qualifications will be 5% or below in every local authority in Wales by 2050
- At least 90% of 16-24 year olds will be in education, employment, or training by 2050
- Eradicate the gap between the employment rate in Wales and the UK by 2050, with a focus on fair work and raising labour market participation of under-represented groups
- An elimination of the pay gap for gender, disability and ethnicity by 2050.



**STRONGER, FAIRER,
GREENER WALES**

A Plan for Employability and Skills

[Stronger, fairer, greener Wales: a plan for employability and skills | GOV.WALES](https://gov.wales/stronger-fairer-greener-wales)

Policy Landscape - Net Zero

Carbon budgets put a cap on emissions for over each 5-year period to 2050, starting in 2016-20. Carbon budgets are expressed in terms of an average reduction against the baseline. The Welsh Ministers will limit how many traded carbon units (offsets) can be used during each carbon budget.

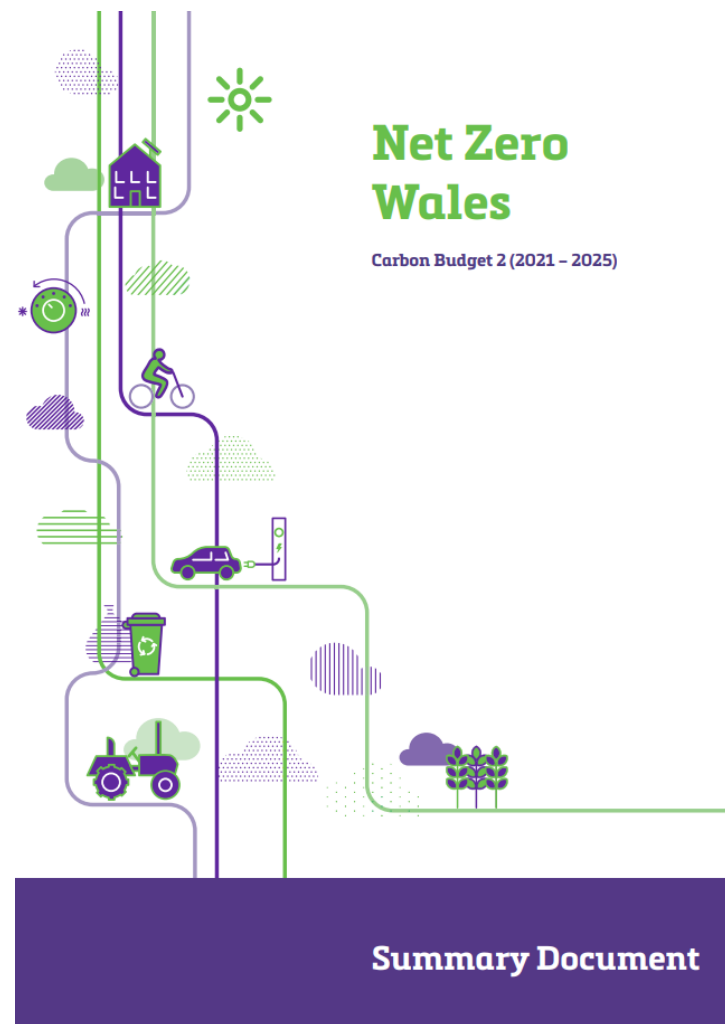
Net Zero Wales is the next emissions reduction plan, following on from Prosperity for all: A Low Carbon Wales covering the first carbon budget (2016-20).

The targets and budgets set in law followed the Climate Change Committee's (CCC) recommendations:

- Carbon Budget 2 (2021-25): 37% average reduction (with 0% offset limit);
- Carbon Budget 3 (2026-30): 58% average reduction;
- 2030: 63% reduction;
- 2040: 89% reduction;
- 2050: at least 100% reduction (net zero).

Focus on 8 Key Emissions sectors

1. Electricity and Heat Generation
 - Decarbonising electricity production from fossil fuels
 - Increasing low carbon and renewable generation
2. Transport
 - Managing travel demand and modal shift
 - Technology and the uptake of transport with low or zero emissions
 - Improvements to fuel efficiency in conventional vehicles
3. Residential Buildings
 - Improved energy efficiency – improving standards and retrofit (Trust Mark)
 - Low carbon heat
 - Behaviour Change
4. Industry and Business
 - Resource and Energy Efficiency
 - Fuel Switching
 - Carbon Capture Utilisation Storage (CCUS)
 - Industrial and Commercial Buildings
5. Agriculture
 - Low carbon farming practices
 - Measures to release Land
6. Land Use, Land Use Change and Forestry
 - Increasing Tree Cover
 - Safeguarding & increasing carbon stores in soils and biomass
 - Peatland Restoration
 - Banning Peat in compost
 - Seagrass & Saltmarsh habitats
 - Blue carbon evidence plan through the Welsh Marine Evidence Strategy for 2019 – 2025
7. Waste Management
 - Action to reduce landfill
 - Maximise recycling
8. Public Sector
 - Target for Net Zero by 2030 in PS



Policy Landscape - Education

Wales is on the path to transform the way children learn, with a new curriculum aimed to prepare its children and young people to thrive at school and beyond. The new curriculum for Wales is future oriented and intends to create a better learning experience for students and to contribute to the overall improvement of Welsh education. The co-construction process succeeded in engaging many and in developing trust, while systemic adjustments in institutions and other policies are helping set in motion a professionally-led education

Teacher education and development

Reformed teacher training, changing how it's done, who provides it, what is studied and where it happens.

- £31 million investment to professional teacher standards
- Raising starting Salary for new teachers
- Curriculum for Wales –
 - Greater involvement from universities, public services, business, sporting and community organisations
- Summer schools experience at universities such as Yale, Chicago and Harvard
- Incentives and funding so that students can return to Wales to complete their postgraduate study

Equity

Pupil Development Grant (PDG) tackling the impact of deprivation and breaking the link between disadvantage and destiny

- PDG expanded for equipment and uniform help
- Rural education action plan
- Reduced infant class sizes
- Make the most of digital resources and learning
- Transforming the expectations, experiences and outcomes for children and young people with ALN.

Wellbeing

In the National mission a new focus was implemented to wellbeing, ensuring equity and excellence for all. Taking forward that work, and recommendations by the Senedd Children, Young People and Education (CYPE) Committee, we are now close to securing an all-Wales framework for a whole-school approach to mental health and emotional wellbeing.

- Successful school counselling service
- Review the school day and year
- School Holiday Enrichment Programme (SHEP)
- Universal access to the curriculum
- Supported to discuss and understand their rights

Our education system

The OECD told us that leadership needed to be a driver for our reform and that Wales had ignored this for too long.

- National approach to leadership
- Commitment to a culture of high standards
- Ensure we keep changing the culture for better standards
- OECD has seen this positive culture change, They said-
“Wales has to strike a balance between showing continuity on this reform journey and acknowledging that the next steps of implementation have to place schools and their communities at the centre. Striking this balance implies continuing to pursue the reform course detailed in Education in Wales: Our national mission with a new emphasis: adopting a school's perspective and giving schools capacity and even more room in the next steps.”



Education in Wales: Our national mission

Update October 2020



[education-in-Wales-our-national-mission-update-october-2020.pdf \(gov.wales\)](#)

Education and Skills – The New Curriculum

The aim of all reforms to the education system is to enable all children and young people in Wales to become:

- Ambitious, capable learners
- Enterprising, creative contributors
- Ethical, informed citizens
- Healthy, confident individuals

In order to realise this, every school will need to develop its own, excellent curriculum. Curriculum for Wales guidance sets out how schools should do this. The Welsh Government and strategic partners have a critical role in supporting and enabling schools. This will require a new approach as schools prepare for Curriculum for Wales and develop their own curriculum.

2022 and beyond

2022	All schools will be moving towards the new curriculum with the introduction of Curriculum for Wales from Nursery to Year 7. Development of new GCSEs.
2023	Curriculum for Wales introduced to Year 8.
2024	Curriculum for Wales introduced to Year 9.
2025	Curriculum for Wales introduced to Year 10. First teaching of new GCSEs.
2026	Curriculum for Wales introduced to Year 11.

The four enabling objectives

1: Professional learning

The Welsh Government and strategic partners are committed to supporting teachers through professional learning from the time they decide to become teachers through their whole career.

2: Leadership

The Welsh Government recognises the scale of the challenge headteachers and other leaders face during the realise Curriculum for Wales and address all schools' needs in relation to COVID-19.

3: Equity, excellence and wellbeing

Continue to devise and implement a proactive, inclusive education system and continuing to raise standards for all. Prioritise support for children and young people who are vulnerable, disadvantaged or have ALN

4: Evaluation, improvement and accountability

The Welsh Government acknowledges the importance of an evaluation, improvement and accountability system that is aligned to the principles of Curriculum for Wales.

Welsh in education

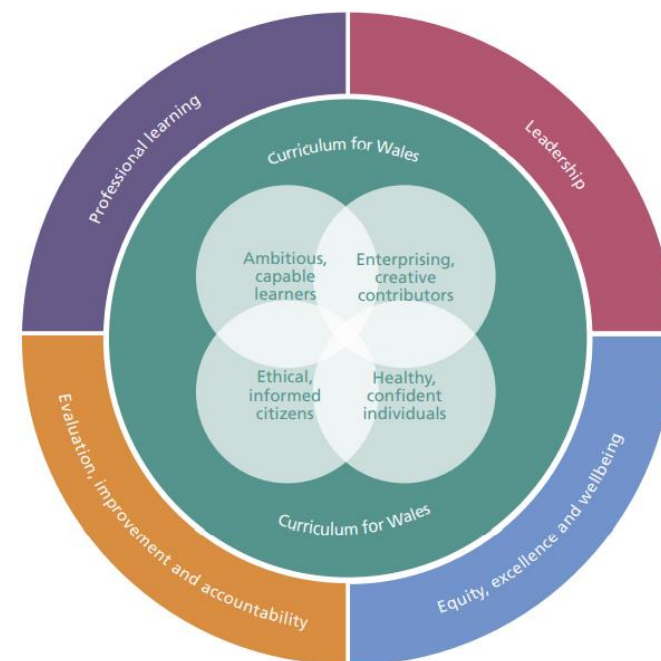
Ensuring that all learners will be able to use the Welsh language when they leave school is important in ongoing education reforms.

Our future generations

The future generations deserve the best and, in Wales, we have the Well-being of Future Generations (Wales) Act 2015 to support us in this endeavour.

Our transformational curriculum

Improving education is our national mission. Nothing is so essential as universal access to, and acquisition of, the experiences, knowledge and skills that our young people need for employment, lifelong learning and active citizenship.



[education-in-Wales-our-national-mission-update-october-2020.pdf \(gov.wales\)](#)

Policy Landscape - Welsh Language

Cymraeg 2050 Strategy sets out the Welsh Government's long-term approach to achieving the target of a million Welsh speakers by 2050.

Three strategic themes:

Theme 1: Increasing the number of Welsh speakers

- Language transmission in the family
- The early years
- Statutory education
- Post-compulsory education
- The education workforce, resources and qualifications

Theme 2: Increasing the use of Welsh

- The workplace
- Services
- Social use of Welsh

Theme 3: Creating favourable conditions – infrastructure and context

- Community and economy
- Culture and media
- Wales and the wider world
- Digital technology
- Linguistic infrastructure
- Language planning
- Evaluation and research

Key actions for achieving:

- Make rapid progress to expand Welsh-medium early years provision by 150 nursery groups over the next decade to facilitate a seamless transition into Welsh-medium education.
- Increase the proportion of each school year group receiving Welsh-medium education from 22 per cent (based on 7,700 seven-year-old learners in 2015/16) to 30 per cent (about 10,500 in each year group) by 2031, and then 40 per cent (about 14,000 in each year group) by 2050.
- Transform how Welsh is taught to all learners in order that at least 70 per cent of those learners report by 2050 that they can speak Welsh by the time they leave school.
- Increase the number of primary teachers who can teach in Welsh from 2,900 to 3,900 by 2031 and 5,200 by 2050; increase the number of secondary teachers who can teach Welsh from 500 to 900 by 2031 and 1,200 by 2050; and increase the number of secondary teachers who can teach through the medium of Welsh from 1,800 to 3,200 by 2031 and 4,200 by 2050.
- Reform the post-16 Welsh-medium and bilingual education and skills offer to ensure that young people have the opportunity to continue developing bilingual skills to support a prosperous economy.
- Review the legislation which underpins the Welsh language to ensure it offers a strong foundation for promoting and facilitating the use of Welsh.
- Ensure that Welsh Government leads by example by promoting and facilitating increased use of Welsh by our own workforce.
- Develop a new regional focus to economic development to help all parts of Wales to benefit from prosperity and support each area to develop its own distinctive identity.
- Transform the Welsh language digital landscape with particular focus on language technologies.
- Develop a national programme to increase understanding of bilingualism.



[Cymraeg 2050: A million Welsh speakers \(gov.wales\)](https://gov.wales/cymraeg-2050)

Policy Landscape - Digital

Digital Strategy Wales

Six missions support the vision:

Mission 1: Digital Services

Deliver and modernise services so that they are designed around user needs and are simple, secure and convenient.

Mission 2: Digital Inclusion

Equip people with the motivation, access, skills and confidence to engage with an increasingly digital world, based on their needs.

Mission 3: Digital Skills

Create a workforce that has the digital skills, capability and confidence to excel in the workplace and in everyday life.

Mission 4: Digital Economy

Drive economic prosperity and resilience by embracing and exploiting digital innovation.

Mission 5: Digital Connectivity

Services are supported by fast and reliable infrastructure.

Mission 6: Data and Collaboration

Services are improved by working together, with data and knowledge being used and shared.

Digital 2030

This is a Post 16 learning opportunity framework to ensure digital skills are prevalent within the workforce and learning environment

We have used the term 'post-16 learning' to encompass:

- Further education (FE)
- Work-based learning (WBL), including apprenticeships and employability programmes
- Adult and community learning (AL)

Vision and Aim – 8 Core objectives

1. Clear, nationally agreed standards for digital skills are in place to enable learners and staff to meet industry, private and public sector requirements, building on the digital competences developed during compulsory schooling
2. Learning is enhanced through the use of technology, wherever it is appropriate and beneficial to the learner
3. The coherence and accessibility of digital learning is increased through a range of curriculum delivery methods that are appropriate to learner and employer needs, and offer learning opportunities in both the Welsh and English languages
4. A safe and secure teaching and learning experience is enabled and managed for all learners and staff through provision of appropriate virtual and physical environments
5. The benefits of digital technology, and possible barriers to their achievement, are understood by all staff including senior leaders
6. Continual improvement of the learner experience and business processes is supported through effective and innovative use of digital technology
7. A culture of collaboration ensures that information and best practice are shared to drive effective use of digital skills to support leadership, learning and business processes
8. Staff, learning and business resources are aligned to enable efficient support of the continually evolving digital requirements of post-16 education



POLICY AND STRATEGY

Digital strategy for Wales

How we will use digital, data and technology to improve the lives of people in Wales.

First published: 23 March 2021

Last updated: 23 March 2021

[Digital strategy for Wales \[HTML\] | GOV.WALES](#)



[Digital 2030: strategic framework | GOV.WALES](#)

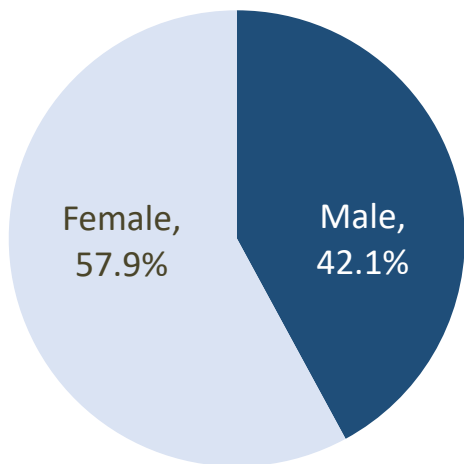
Policy Landscape - Apprenticeship

Aligning the Apprenticeship Model with the needs of the economy 2017

This document covered a 5 year cycle from 2017 to 2022.

The core aims of the plan:

- Address acute skill shortages
- Introducing an all-age approach
- Jobs and growth
- Quality and Benchmarking
- Improving Access, Equality and Equity of opportunity
- Deliver Apprenticeships in Welsh
- Develop skill pathways
- Establish a new system for framework review and development



Gender splits SWW by Uptake

More Female Apprenticeship uptake than Male

Sectors in SWW – Total Work based Learning Uptake 2017 - 2021

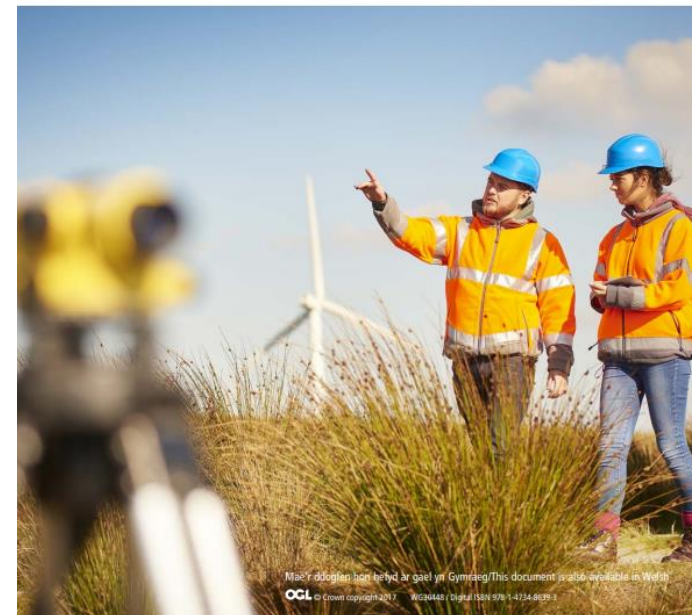
Healthcare and Public Services	20,240
Management and Professional	6,145
Construction	5,925
Business Administration	5,120
Engineering	4,965
Hospitality	2,010
Leisure, Sport and Travel	1,895
Hair and Beauty	1,730
Retailing and Customer Service	1,450
Agriculture	740
Manufacturing	500
Transportation	200
Media and Design	180
Apprenticeships SWW 2017 /2021	51,100

Stats Wales: Work-based learning programmes by sector and programme type

February 2017



Aligning the Apprenticeship model to the needs of the Welsh economy



National Economic Factors



Covid - 19 - Pandemic Impacts

The impact Covid had on the region was significant, some sectors struggled, some flourished and were placed under increased workload for additional products and services.

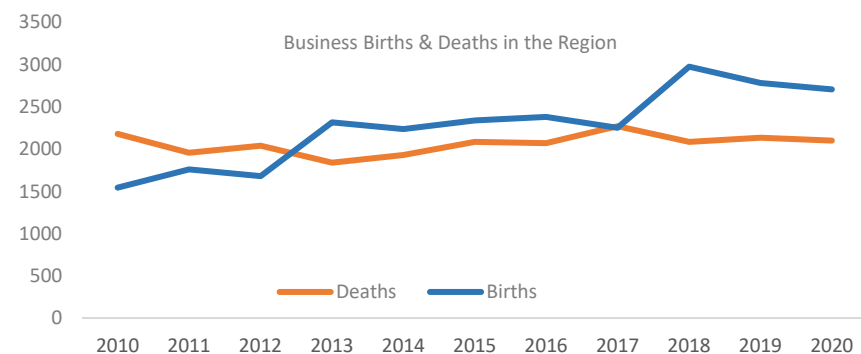
During the Pandemic the RLSP prepared quarterly region specific covid impact updates on the ongoing effects the pandemic created in of the South West Wales(SWW) region. These reports were utilised to huge effect to minimise disruption, help ensure the support network was in place for employers and employees that were highlighted as being a concern.

All sectors experienced their own specific and shared challenges during this time, the long term effect is as yet unknown, however there are positive signs showing through as job postings in 2022 start to increase dramatically over postings in 2020 /21

We have also seen a reduction in the economically inactive population since 2021, however some of this shift has resulted in higher unemployment levels post pandemic.

Employment levels are starting to level out with pre pandemic levels.

The chart below details all of the Regions businesses that have started (Births) or failed/ closed (Deaths) over time. It appears that although the pandemic effects were huge economically, there was no significant rise in company Deaths (however full data for 2021/22 is not yet available and may tell a different story). Births however, although now on a downward trend, are up on pre pandemic levels.



Source: Stats Wales

Top Occupations By Job Postings

The occupation table below provides an indication of which occupations are important to the SWW region and possible impacts of pandemic factors. It is ordered by [Location Quotient](#), a measure of comparative advantage SWW has versus the UK.

There is also an [Exposure Index](#) which reflects how affected an occupation or industry has been in relation to the Pandemic.

SOC	Name	Job Postings (Dec 2019)	Job Postings (Jun 2022)	% Change (Dec 2019 - Jun 2022)	LQ (2022)	Exposure Index
6145	Care Workers and Home Carers	494	1,391	+181.6%	1.31	5
2231	Nurses	427	906	+112.2%	1.32	3
9272	Kitchen and Catering Assistants	200	523	+161.5%	0.97	33
7129	Sales Related Occupations n.e.c.	248	460	+85.5%	0.73	17
7219	Customer Service Occupations n.e.c.	160	447	+179.4%	0.91	14
4159	Other Administrative Occupations n.e.c.	230	427	+85.7%	0.92	13
9233	Cleaners and Domestic	140	328	+134.3%	1.36	22
7111	Sales and Retail Assistants	100	257	+157.0%	1.01	22
4216	Receptionists	67	239	+256.7%	1.08	19
6125	Teaching Assistants	140	228	+62.9%	1.10	6

Description	Jobs (2021)	Jobs (2022)	Change (2021 - 2022)	% Change (2021 - 2022)	LQ (2022)	GVA	Exposure Index
Other Non-ferrous Metal Production	692	728	36	+5.2%	29.67	£19,465,195.59	4
Manufacture of Gas	94	105	11	+11.7%	25.05	£10,595,694.13	4
Manufacture of Basic Iron and Steel and of Ferro-alloys	5,169	5,253	84	+1.6%	24.39	£172,892,927.59	9
Mining of Hard Coal	240	234	-6	-2.5%	21.30	£62,155,241.64	5
Manufacture of Refined Petroleum Products	1,001	1,085	84	+8.4%	13.11	£186,161,801.40	2
Manufacture of Other Tanks, Reservoirs and Containers of Metal	253	254	1	+0.4%	6.42	£7,747,658.62	13
Manufacture of Household and Sanitary Goods and of Toilet Requisites	301	300	-1	-0.3%	5.58	£16,637,918.65	10
Processing and Preserving of Meat	1,295	1,349	54	+4.2%	5.31	£52,558,598.20	9
Shaping and Processing of Flat Glass	514	532	18	+3.5%	4.67	£17,612,828.56	11
Holiday and Other Short-stay Accommodation	1,728	1,763	35	+2.0%	4.30	£42,305,176.42	41

Source: Emsi Burning Glass 2022: Top Occupations by Posting with Location Quotient and Exposure index

The tables represent core job roles and core industries in the region.

The vast majority of job roles are seeing a surge in recruitment requirements when looking at unique job posting 2019 -2022

When looking at the Exposure index score, the higher the number means the more at risk the job role or sector is during a pandemic.

e.g. The higher the exposure index number, the greater the risk to that job or sector during restrictions.

Most exposed Roles:

- Catering & Kitchen
- Cleaners
- Retail and Sales
- Receptionists

Most exposed industry

- Manufacturing
- Accommodation
- Tourism

Covid - 19 - Pandemic Impacts – Productivity

The sickness absence rate in the UK in 2021 rose to 2.2%, (from a record low due to lockdown restrictions of 1.8% in 2020); this is the highest it has been since 2010, when it was also 2.2%.

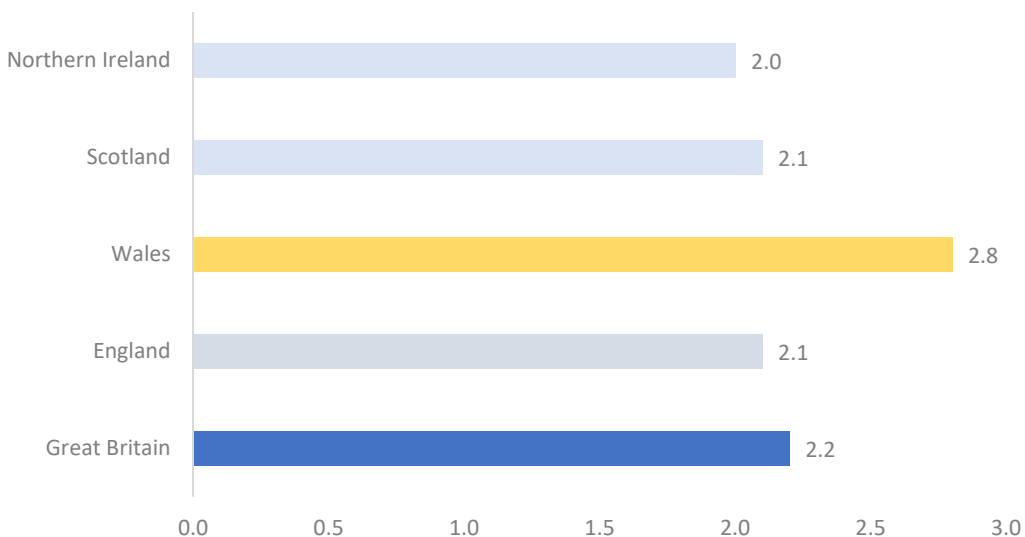
An estimated 149.3 million working days were lost because of sickness or injury in the UK in 2021, equivalent to 4.6 days per worker.

COVID-19 accounted for nearly one in four of all occurrences of sickness absence in 2021.

The groups with the highest rates of sickness absence in 2021 included women, older workers, those with long-term health conditions, people working part-time and people working in caring, leisure and other service occupations.

In 2021, as in previous years, workers living in Wales had the highest sickness absence rate (2.8%). Those living in London had the lowest sickness absence rate (1.7%), 0.5 percentage points below the UK average.

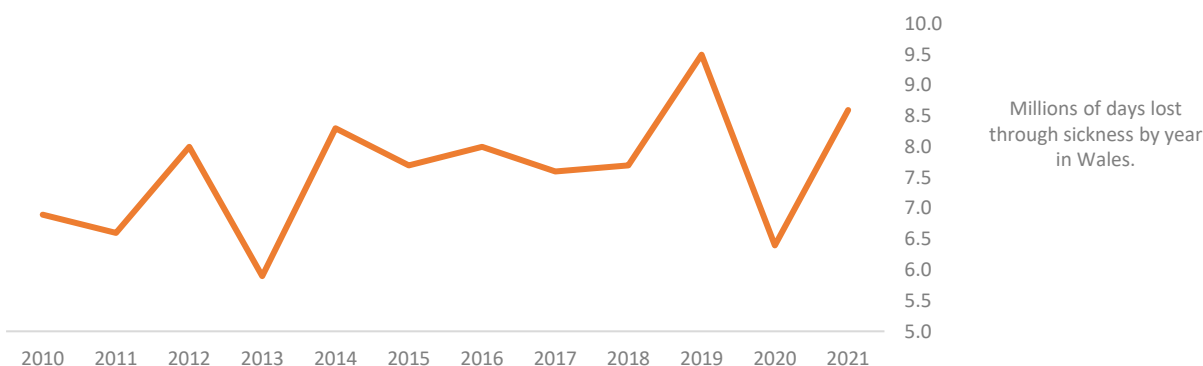
This can be largely explained by the younger age profile of people and workers living in London and the types of occupations that they do. There is a large concentration of high-skilled jobs in London, which tend to have lower rates of sickness absence.



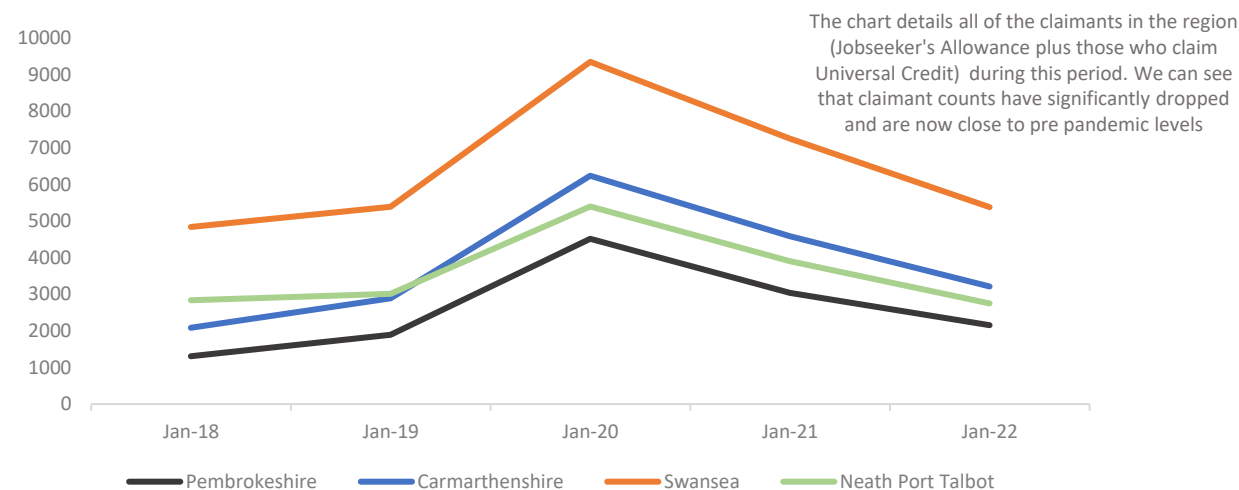
[Sickness absence in the UK labour market - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk)

It may look a little odd that during the height of the pandemic (2020) Sickness levels in Wales dropped. However this is in the main due to the restrictions that were put in place with workers on furlough and businesses temporally closed.

The main take out from this information is that sickness levels pre and post pandemic restrictions (2019 & 2021) are at a 10 year high (combined Male Female av). Data for 2022 is not available as yet but it is expected to climb again.



[Sickness absence in the UK labour market - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk)



Source: Stats Wales

Brexit

Given how closely the UK's exit from the EU was followed by the start of the Covid-19 pandemic, it's difficult to pinpoint the direct impact of Brexit on the economy specifically relating to Wales and the Region. After the UK's departure from the EU in late January 2020, GDP fell by 0.4% in the February.

The Pound severely suffered against the Euro post the formal exit but was starting to recover.



Some of the economic and financial effects that we are currently experiencing are, for example:

- Shortages in some goods and raw materials.
- Shortages of HGV drivers and other workers.
- Travel delays and difficulties.
- Higher property prices.
- More job vacancies, some are harder to fill.
- Less ability to freely travel and work in Europe.
- Customs charges.
- Visa charges.
- Import taxes.
- Additional mobile phone charges.

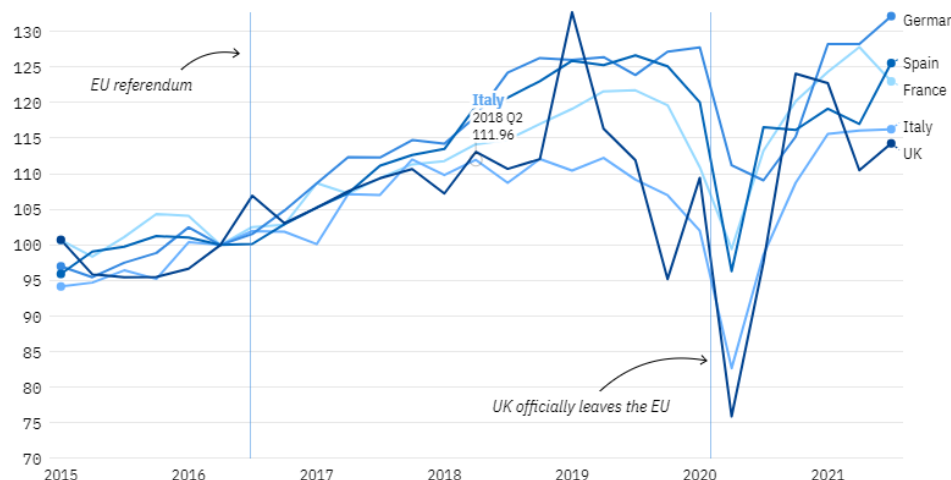
Some of the above effects may not be blamed entirely on Brexit. The clear impact of Brexit on individuals financially and on the UK economy as a whole will not be evident until we have recovered from the effects of COVID. Even then, a pre- and post-Brexit comparison may not be fully possible because of the effects left by COVID.

Based on figures from the OECD, UK GDP grew by 14.3% between Q2 2016 and Q3 2021. This is a smaller growth rate than four of the EU's largest economies. During the same period, Germany had the highest indexed growth rate at 32.2%, followed by Spain (25.6%), France (23%) and Italy (16.3%).

The UK-based Office for Budget Responsibility (OBR) states that the long-term impact of Brexit will be worse for the UK economy than Covid-19. The OBR estimates that Brexit will reduce the UK's potential GDP by 4% and the pandemic by a further 2%.

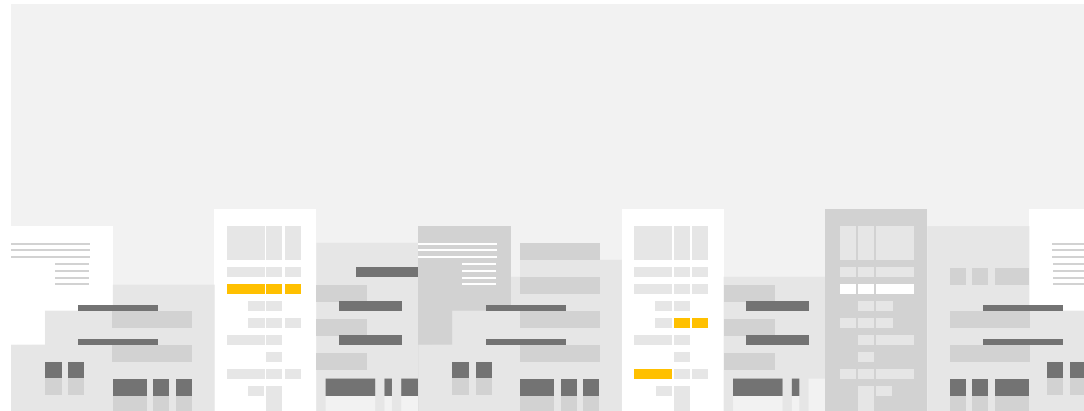
UK growth lags behind EU member states

GDP index (2016 Q2 = 100)



Caution must be observed when looking at the post pandemic / Brexit growth due to other factors that have since come into play, such as the war in Ukraine, energy, food, material prices etc. There is a growing concern that the UK is now into recession.

Demographics, Labour & Industry.



Economy Overview

South West Wales Region

707,599

Population (2021)

Population grew by 11,468 over the last 5 years and is projected to grow by 9,675 over the next 5 years.

267,032

Total Regional Employment

Jobs decreased by 3,805 over the last 5 years but are projected to grow by 2,833 over the next 5 years.

£25.1k

Avg. Wages Per Job (2021)

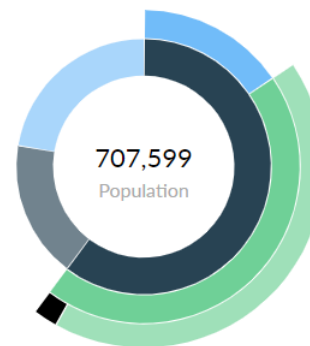
Regional average wages per job are £5.4k below the national average wages of £30.4k per job.

Key Takeaways

- From 2016 to 2021 the regions population increased by 1.6% growing by 11,468. Population is expected to increase by 1.4% from 2021 to 2026 adding 9,675.
- From 2016 to 2021 jobs declined by 1.4% from 270,863 to 267,032. This change fell short of the national growth rate (of 1.1%) by 2.5%
- The top 3 industry sectors in 2021 are Health, Public Administration and Non-specialised Retail

Source: Emsi Burning Glass 2022:Economy Overview

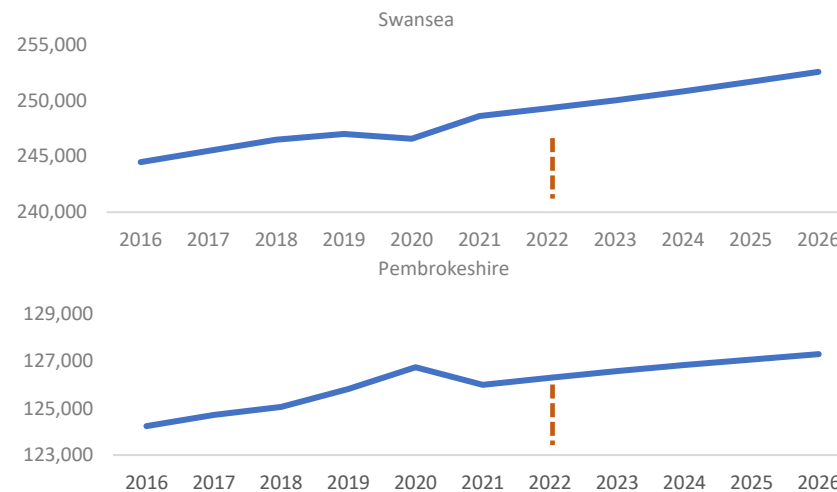
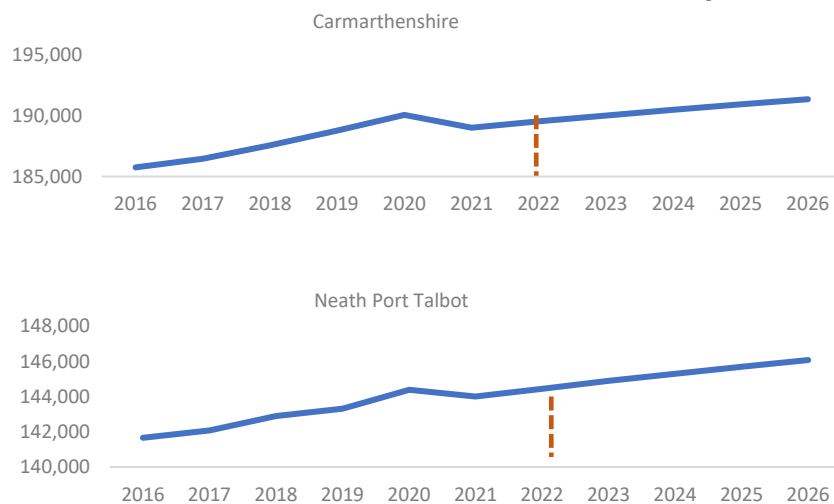
2021 Labour Force Breakdown



	Population
Total Working Age Population (16-64)	426,041
Not in Labour Force (16+)	108,794
Labour Force	317,247
Employed	301,677
Unemployed	15,569
Under 16	122,831
Over 64	158,727

Source: Emsi Burning Glass 2022:Economy Overview

Population trends by area – future predictions



Data Source: Emsi Burning Glass 2022

Population Summary

- 707.6K in the region up by around 5k on 2019 (However Swansea has seen a small decrease in population since 2011 of 0.2%)
- Health - increase of 4255 (7%) over 55 to 64 year olds. Potentially an issue for public services
- Skills and Education - 4900 (9%) Decrease in 19 – 29 year olds
- Experience- 7300 (7%) drop in experienced workers in the age group 45-54
- Ethnicity - 96.2% are white

Source: Emsi Burning Glass 2022: Demographics Overview

Demographics

2021 Age Cohort Demographics

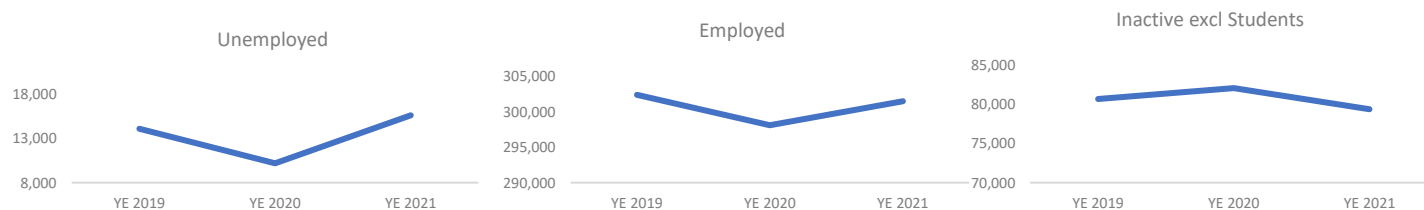


Age Cohort	2021 Population	2021 Percent
Under 16 years	122,831	17.4%
16 to 34 years	160,184	22.6%
35 to 54 years	167,832	23.7%
55 to 74 years	183,389	25.9%
75 years and over	73,363	10.4%

2021 Ethnicity Demographics



Ethnicity	2021 Population	2021 Percent
All Other Ethnicities	13,658	1.9%
Chinese or Other Ethnic Group: Other	3,654	0.5%
Asian or Asian British: Other Asian	4,052	0.6%
Mixed: All Mixed	5,452	0.8%
White	680,782	96.2%



Source: Stats Wales

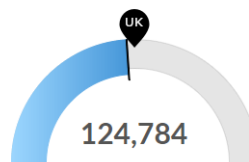
Employment

- Unemployment: - up slightly on pre pandemic levels. Increase of 1500
- Employed: - Just below pre pandemic levels. Drop of 900
- Inactive: (excl students): - is below pre pandemic levels. Drop of 1300
- NEET: 13.9% of all 16-24 YO in Mid and South West Wales

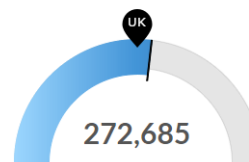


This suggests a net movement from Inactive to unemployed

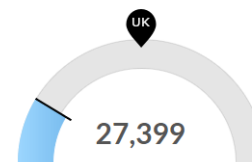
Population Characteristics



Millennials
The region has 124,784 25-39 Y/O. Approx. 8k less than the national average for a region this size.



Retiring Soon
Retirement Risk is high in the Region with Approx. 27k more retirees in the next 10 years than the national average for a region of this size



Racial Diversity
Racial Diversity is low in the Region

Source: Emsi Burning Glass 2022: Demographics Overview

The population now at age 55 and above is over 36%. With an ageing and retiring population, not only will new skills be required in the region, but the gap of retiring trades will also need to be filled which will be a challenge due to below national levels of millennials in the region

- Pembrokeshire has the highest % of over 65's in the region @26.1%
- Carmarthenshire 24.2%
- Neath Port Talbot 21.2%
- Swansea 21.5%

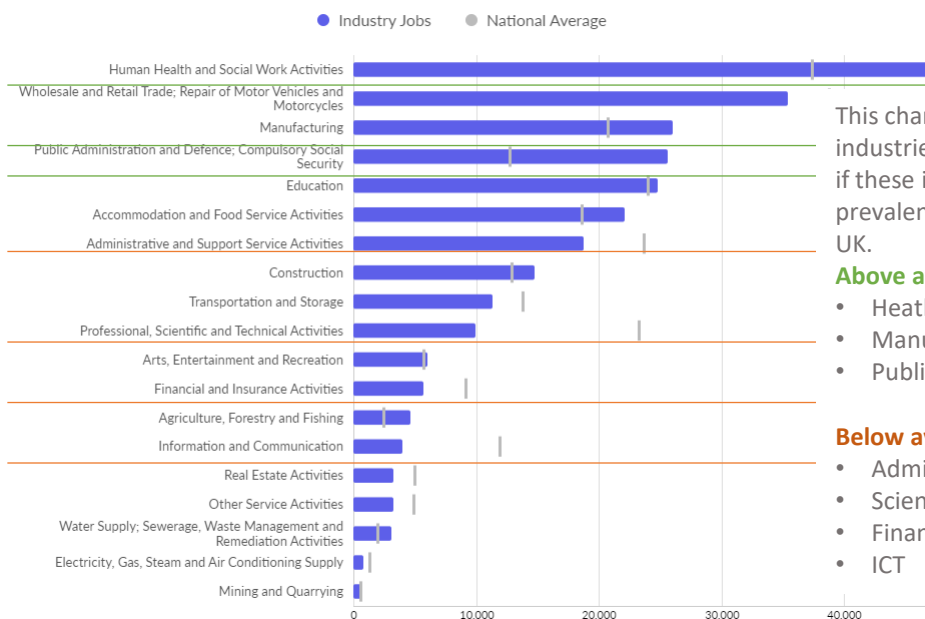
Labour Market and Industry - Sectors

There are some important major employers (such as the Valero refinery and Tata Steel) but the region's business profile is skewed towards micro and small businesses, with 94.3% of all enterprises being micro businesses (0-9 employees).

An over-reliance on micro and small sized enterprises presents unique challenges and requires business support mechanisms which are targeted, yet flexible and consider the unique set of challenges and barriers to scaling up those smaller businesses face. These include;

- Talent recruitment and retention
- Access to finance and investment
- Achieving economies of scale
- Taking advantage of procurement opportunities
- Access to suitable premises
- Access to and making better use of technology

Largest Industries



This chart details the largest industries in the Region and details if these industries are more or less prevalent than other regions of the UK.

Above average prevalence in

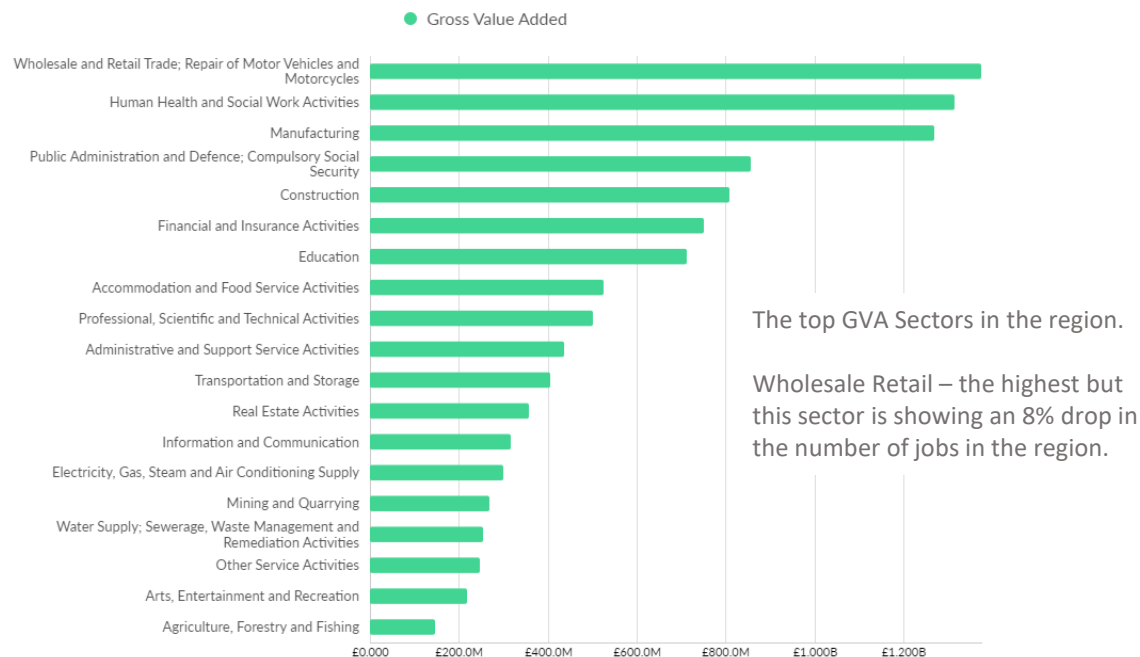
- Health
- Manufacturing
- Public Admin & Defence.

Below average prevalence in

- Admin and Support
- Scientific and Technical
- Financial
- ICT

Source: Emsi Burning Glass 2022: Industry Overview

Top Industry GVA



The top GVA Sectors in the region.

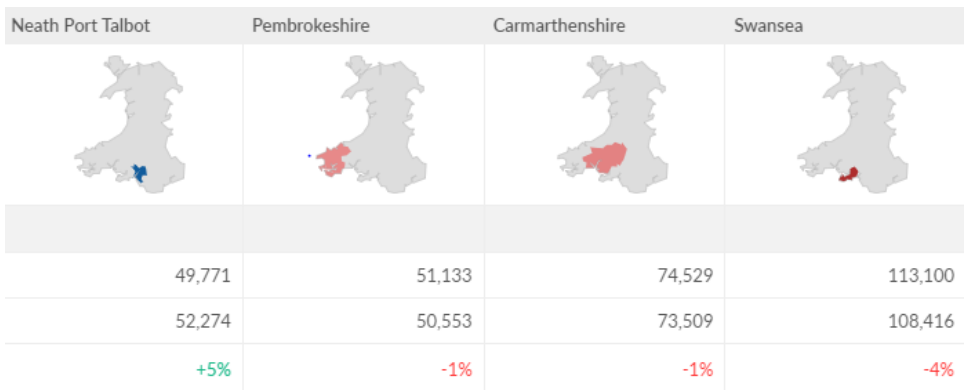
Wholesale Retail – the highest but this sector is showing an 8% drop in the number of jobs in the region.

Source: Emsi Burning Glass 2022: Industry Overview

	Population (2021)	Jobs (2021)	GVA	Imports	Exports
Region	707,599	267,129	£11.1b	£23.9b	£20.6b
Carmarthenshire	189,021	66,808	£2.7b	£6.3b	£4.8b
Neath Port Talbot	144,003	49,694	£1.9b	£5.0b	£3.7b
Swansea	248,586	105,827	£4.4b	£8.3b	£6.4b
Pembrokeshire	125,989	44,800	£2.1b	£6.7b	£8.0b

Source: Emsi Burning Glass 2022: Industry Overview

Labour Market - Jobs Spread



Source: Emsi Burning Glass 2022: Labour Market Overview

Job Postings Regional Breakdown

[Jump to Job Postings by Location](#) ■■■

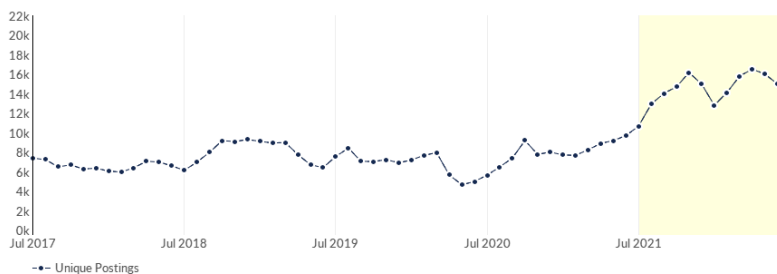


Local Authority	Unique Postings (Jul 2021 - Jun 2022)
Swansea	30,180
Carmarthenshire	16,475
Neath Port Talbot	10,838
Pembrokeshire	9,913

Source: Emsi Burning Glass 2022: Labour Market Overview

Unique Postings Trend










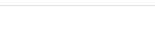
[Jump to Job Postings Table](#) ■■■












Source: Emsi Burning Glass 2022: Labour Market Overview

There has been a steady increase in job postings since restrictions were lifted as a result of the Pandemic. This increase is predicted to keep rising.

Below are statistics on frequency of job adverts, the posting intensity indicates how many times the post was advertised before it was filled. The higher the ratio (e.g. 7 : 1 would indicate the position is advertised up to 7 times before filled) the more difficult the role can be to recruit.

Company	Total/Unique (Jul 2021 - Jun 2022)	Posting Intensity	Unique Postings Trend (Jul 2021 - Jun 2022)
NHS	35,996 / 5,424	7 : 1	
Swansea University	3,957 / 1,741	2 : 1	
Swansea Bay University Health Board	20,884 / 1,618	13 : 1	
Hays	3,761 / 1,471	3 : 1	
Hywel Dda University Health Board	16,838 / 1,215	14 : 1	
Carmarthenshire County Council	1,530 / 1,097	1 : 1	
Randstad	2,218 / 935	2 : 1	
Neath Port Talbot County Borough Council	1,439 / 881	2 : 1	
Teacheractive	1,808 / 795	2 : 1	
Pembrokeshire County Council	1,249 / 684	2 : 1	

Occupation (SOC)	Total/Unique (Jul 2021 - Jun 2022)	Posting Intensity	Unique Postings Trend (Jul 2021 - Jun 2022)
Professional Occupations	72,517 / 15,165	5 : 1	
Associate Professional and Technical Occupations	25,189 / 9,409	3 : 1	
Caring, Leisure and Other Service Occupations	28,472 / 9,272	3 : 1	
Elementary Occupations	18,894 / 7,508	3 : 1	
Administrative and Secretarial Occupations	17,821 / 6,602	3 : 1	
Sales and Customer Service Occupations	15,331 / 6,453	2 : 1	
Skilled Trades Occupations	10,431 / 4,754	2 : 1	
Managers, Directors and Senior Officials	12,187 / 4,116	3 : 1	
Process, Plant and Machine Operatives	6,291 / 2,750	2 : 1	

Source: Emsi Burning Glass 2022: Labour Market Overview

Labour Market and Industry –Skills Overview

The following provides insight into the supply and demand of relevant skills by comparing the frequency of skills present in job postings against skills present in today's workforce

Many roles are advertised multiple times, however in the following tables we can see how many unique job postings have advertised over time

Occupation Type	2019 Jobs	2022 Jobs	2019 - 2022 Change	2019 - 2022 % Change
Managers, Directors and Senior Officials	26,472	25,647	-825	-3%
Professional Occupations	50,048	50,331	282	1%
Associate Professional and Technical Occupations	32,309	31,543	-766	-2%
Administrative and Secretarial Occupations	33,488	33,017	-472	-1%
Skilled Trades Occupations	32,187	30,702	-1,486	-5%
Caring, Leisure and Other Service Occupations	28,500	28,662	163	1%
Sales and Customer Service Occupations	25,713	24,612	-1,101	-4%
Process, Plant and Machine Operatives	17,337	18,381	1,044	6%
Elementary Occupations	42,479	41,858	-620	-1%
	288,533	284,752	-3,781	-1%

The region has seen a loss of jobs relating to Management, Professional / technical and skilled trade since 2019. Possible causes:

- Redundancies (Covid impact)
- Retirement, difficulty in refilling
- Brain Drain, High skills in demand from competitors outside of the region.

There has been a 6% gain in machine operators.

The below displays the most mentioned skills within the unique job postings in the region.

- Web IT and digital skills are mentioned in over 4% of all job ads.
- Care and Nursing account for 8% of all job postings

In Demand Job Skills

Skill	Frequency in Postings	Postings with Skill / Total Postings (Jul 2021 - Jun 2022)
Nursing	4%	3,001 / 67,406
Personal Care	4%	2,946 / 67,406
Cascading Style Sheets (CSS)	4%	2,800 / 67,406
WebKit	4%	2,635 / 67,406
Flexbox	4%	2,613 / 67,406
Marketing	4%	2,549 / 67,406
Service Quality	4%	2,493 / 67,406
Mental Health	3%	2,289 / 67,406
Auditing	3%	2,145 / 67,406
Finance	3%	2,075 / 67,406
Warehousing	3%	1,976 / 67,406
Housekeeping	3%	1,691 / 67,406
Key Performance Indicators (KPIs)	2%	1,659 / 67,406
Accounting	2%	1,379 / 67,406
Risk Analysis	2%	1,370 / 67,406
Restaurant Operation	2%	1,295 / 67,406
Invoicing	2%	1,189 / 67,406
Numeracy	2%	1,125 / 67,406
Cooking	2%	1,119 / 67,406
Learning Disabilities	2%	1,117 / 67,406

Source: Emsi Burning Glass 2022: In Demand Skills

The below displays the most mentioned experiential skills within job postings

58% of the personal / experience based skills account for

- Communication
- Management
- Customer Service

In Demand Experience Skills

Skill	Frequency in Postings	Postings with Skill / Total Postings (Jul 2021 - Jun 2022)
Communications	26%	17,495 / 67,406
Customer Service	18%	12,148 / 67,406
Management	15%	10,287 / 67,406
Welsh Language	10%	6,562 / 67,406
Sales	9%	6,207 / 67,406
Teaching	7%	4,429 / 67,406
Detail Oriented	6%	3,923 / 67,406
Planning	6%	3,853 / 67,406
Enthusiasm	6%	3,850 / 67,406
Leadership	6%	3,732 / 67,406
Self-Motivation	5%	3,076 / 67,406
Interpersonal Communications	4%	2,595 / 67,406
Research	4%	2,484 / 67,406
Operations	4%	2,463 / 67,406
Problem Solving	4%	2,360 / 67,406
Innovation	3%	2,135 / 67,406
Basic Math	3%	1,827 / 67,406
Time Management	3%	1,770 / 67,406
Resilience	3%	1,767 / 67,406
Microsoft Excel	3%	1,758 / 67,406

Labour Market and Industry - Sectors

Total workforce for the region employed and unemployed is 317,000 with around 284,000 employed

The table clearly indicates where we are seeing jobs growth and job decline based on 2020 – 2022 data.

At Risk Sectors - Job Decline

- Wholesale and Retail
- Accommodation and Retail
- Agriculture
- Professional Scientific and Technical
- Financial and Insurance
- Information and Communication (ICT)

Growth Sectors: - Job Growth

- Public Administration
- Administrative
- Construction
- Transport
- Energy, Electricity & Gas

Sector	2020 Jobs	2022 Jobs	2020 - 2022 Change	2020 - 2022 % Change
Human Health and Social Work Activities	47,074	47,083	10	0%
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	38,600	35,370	(3,231)	(8%)
Manufacturing	26,460	26,802	342	1%
Public Administration and Defence; Compulsory Social Security	24,808	25,976	1,168	5%
Education	24,867	24,724	(143)	(1%)
Accommodation and Food Service Activities	24,561	23,085	(1,476)	(6%)
Administrative and Support Service Activities	18,401	19,883	1,482	8%
Construction	15,529	17,066	1,537	10%
Agriculture, Forestry and Fishing	13,071	12,573	(498)	(4%)
Transportation and Storage	11,357	12,259	902	8%
Professional, Scientific and Technical Activities	11,133	10,697	(436)	(4%)
Arts, Entertainment and Recreation	6,262	6,317	54	1%
Financial and Insurance Activities	6,069	5,713	(356)	(6%)
Real Estate Activities	4,160	4,307	147	4%
Other Service Activities	4,337	4,261	(75)	(2%)
Information and Communication	4,171	3,889	(282)	(7%)
Water Supply; Sewerage, Waste Management and Remediation Activities	3,035	3,274	239	8%
Electricity, Gas, Steam and Air Conditioning Supply	827	827	827	0%
Mining and Quarrying	629	636	7	1%
Total	285,348	284,752	(597)	(0%)

Source: Emsi Burning Glass 2022:

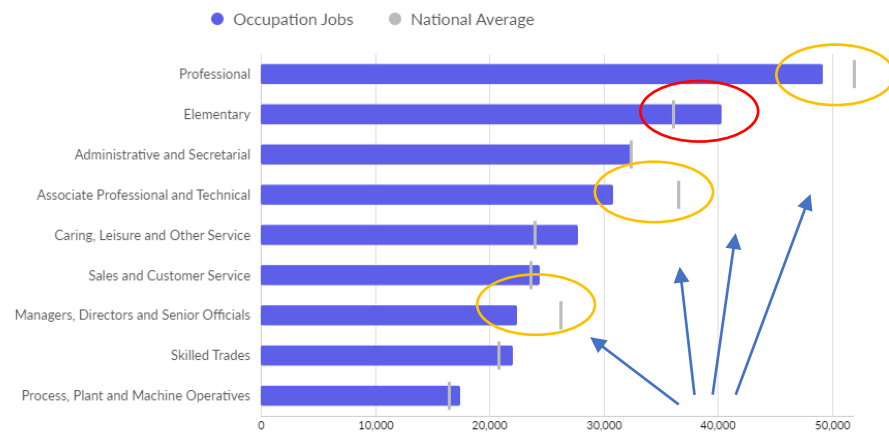
Over Represented vs National Average: 2020 - 2022

- Elementary
- Caring

Under Represented vs National Average

- Professional , Associate and Technical
- Managers and Senior Officials
- Skilled Trades & Plant Operators

- Huge opportunity for reskilling elementary workers where there is an over representation to plant and trade roles.
- Development and upskilling of middle management into more professional roles
- Increased numbers in higher degree level working adults in the area could fill technical positions.



The region has an overrepresentation of employment in lower paid, lower skilled sectors and a lower quota in high paid and skilled sectors.

Source: Emsi Burning Glass 2022:

Labour Market and Industry – FE & HE Overview

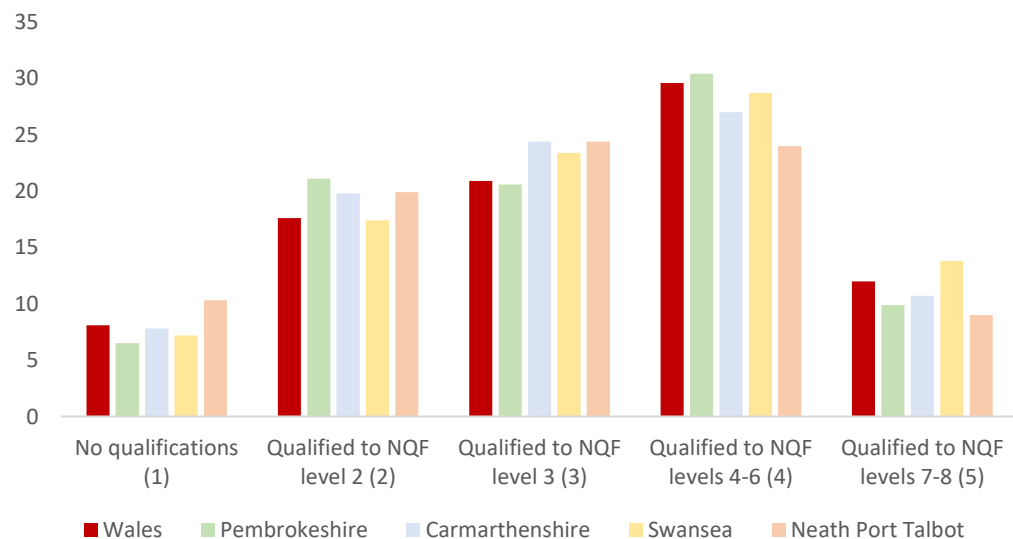
Qualifications of Working age Adults 16 - 24

When looking at regional education levels of all employed people in the region, we do have a good proportion of people educated to level 4 and above.

There are approximately 97,000 employees who are qualified to level 4-6, the region employs 21,400 Health Professionals, and a further 10,000 in Police, Fire and Teaching, the majority of these workers will be educated to at least level 5 or higher.

It is important that these education levels are maintained for these public sectors, however, it means for private sector that the talent pool of qualified employees are considerably smaller than the chart suggests.

Neath Port Talbot have the highest proportion of unqualified adults 2.2% over the national average, also has the lowest at levels 7-8 (3% lower than the national average)



Further and Higher Education

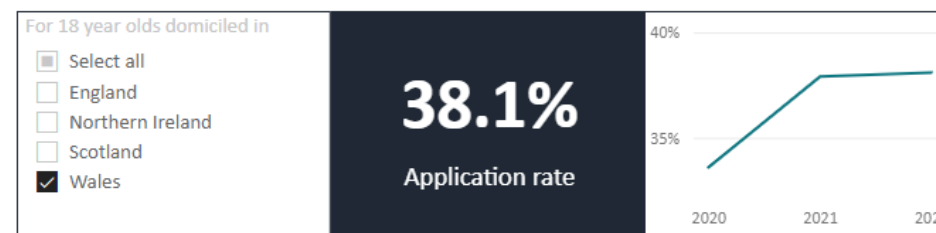
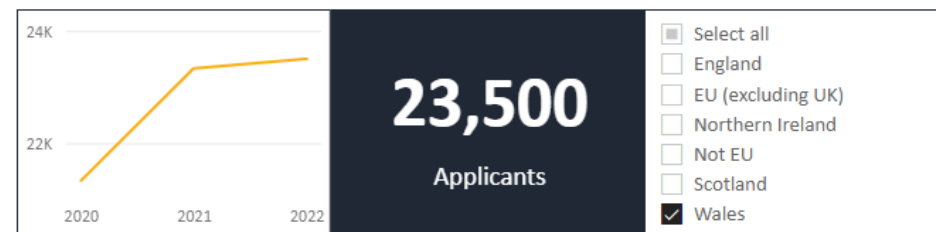
2020/ 21 data suggests that over 36,500 students completed an FE or HE course in Wales. 54% of these students completed outcome surveys, summary below.

- 4.5% claiming to still be unemployed
- 78% are in some form of Employment
- 16% going on for further study or travel

[Graduate Outcomes 2019/20: Summary Statistics - Graduate activities and characteristics | HESA](#)

Higher Education for 2022/23

Applications for Welsh students to HE in Wales is at an all time high for 2022/23 but only ahead of Scotland. The average application rate for the UK is 44.1%



Migration and Brain Drain

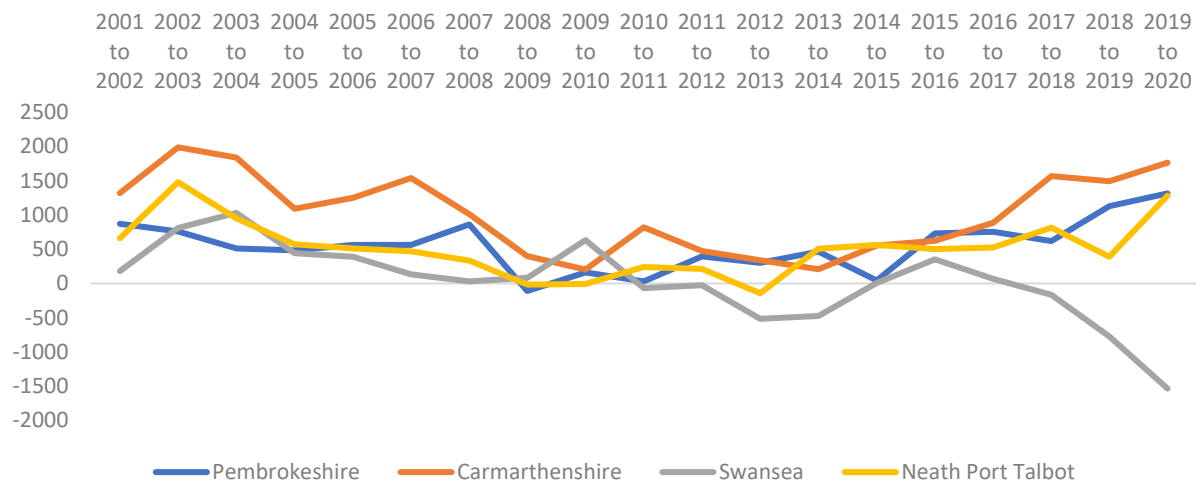
Employers are increasingly telling the RLSP of losing skilled individuals to England based companies. There is no hard evidential data on this although there are indicators can be draw upon to substantiate this problem.

Net Migration figures tell us how many people are moving into and out of a specific area of the Region. Pembrokeshire, Carmarthen and Neath Port Talbot have positive migration figure (more people come in than leave) However the demographic tells us that a higher volume of older age groups are moving in than younger age groups.

Swansea however is on a huge downward net migration trend, more people are leaving Swansea than arriving placing net migration in the negative.

- Over 1,200 15-29 year olds, left the area in 2020.
- Net Migration in Swansea for 2020 is -1539
- The majority of migration happens in the 15-29 age group. (this could be related to student movements coming in and out from other areas.)

The below figure displays the net migration in the region since 2001



Students

- In 2019/20, of the 11,040 Welsh domicile graduates entering work that were surveyed, 7,990 (72%) entered work in Wales while 2,950 (27%) entered work in England. Less than 1% entered work in Scotland and Northern Ireland.
- In 2018/19, of the 10,885 Welsh domicile graduates entering work that were surveyed, 7,870 (72%) entered work in Wales while 2,945 (27%) entered work in England. 1% entered work in Scotland and less than 1% entered work in Northern Ireland.
- In 2019/20, of the 12,005 surveyed UK domiciled graduates from Welsh HEPs entering work, 7,105 (59%) entered work in Wales while 4,770 (40%) entered work in England. Less than 1% entered work in Scotland and less than 1% entered work in Northern Ireland.
- In 2018/19, of the 11,925 UK domiciled graduates from Welsh HEPs entering work that were surveyed, 7,045 (59%) entered working in Wales while 4,755 (40%) entered work in England. Less than 1% entered work in Scotland and less than 1% entered work in Northern Ireland.

[Graduate Outcomes 2019/20: Summary Statistics - Summary | HESA](#)

Experienced workers

Demographic data tells us a decrease of 7,300 45-54 year olds in the region. This age bracket are the experienced skilled workers who could potentially be taking professional jobs such as project management, It is suggested by cluster groups to ensure continuity of projects and driving forward of new large scale projects, more project managers are required alongside retaining the existing talent in the region.

Summary

- Net Migration in the City of Swansea is potentially concerning.
- Wales as a nation seems to be losing student talent to England at an alarming level
- It has never been easier to work for a distance company. (E.g. live in Wales work for an English company) with a larger home working culture that the pandemic presented. The numbers on Migration and Student movements do not really take this factor into account, therefore the picture could be even worse.

Mobility of the Workforce

There were 150 residents per square kilometre in Wales in 2021. This is about the same as 1.1 residents per football pitch-sized area of land. It is slightly higher than the 148 residents per square kilometre in 2011 and compares with 106 residents per square kilometre a century ago in 1921.

Carmarthenshire and Pembrokeshire have a very low Population Density (79 & 76 respectively) meaning labour mobilisation is more of a concern in these regions. Combine these factors with increased fuel poverty and rising cost of living, labour mobility will become a leading concern in the region.

Over 94% of the regions industry are Micro (less than 9 employees) mobility of labour is even more important for these smaller businesses

Older People in work

Over 1.3m people aged over 50 are living in Wales, in 8 years time this figure is predicted to increase by a further 100,000 taking the figure up to 1.4m. Currently 69.4% of people aged 50 to 64 are in employment in South West Wales.

13% of older workers have changed their retirement plans since the Pandemic stating that they now plan to work longer.

In Wales 49% said they would like to retire but cant afford to however 46% of these stated they do not want to work past retirement age.

Overall the relationship with older workers and employers in Wales is positive with 64% stating that their employer supports them to do their job well, however older workers on lower income or are required to do more manual work feel less supported and discriminated against.

76% of older workers stated they feel confident with their digital skills and 68% believe they have the right skills to do their current job

Health and lack of opportunities for older workers are the main barriers for unemployed over 50's

Skills Gaps

Filling the retirement hole

99,042 regional residents are aged 55- 64. This poses a skills gap to fill over the next 10 years as this population moves to retirement.

This poses a potential problem because the under 9 population numbers dropped by 3% compared to pre pandemic, and the 5-15 age group is 12% less than the 55 -64 group, therefore to just fill the roles of retirees alone will be challenging.

Furthermore, additional pressure will be created in the public services area for an ageing demographic such as Heath care, mobility schemes, etc. and these sectors are already struggling to recruit, nursing and care being the most advertised jobs in the region during 2021.

<https://statswales.gov.wales/>

Net Zero emerging requirements

The list of the additional skills that will be required for the Net Zero Carbon budget is extensive. There is a clear focus on 8 sectors in the Carbon Budget which will inevitably create more skilled work demand. There will be a requirement for cross pollination of skills across sectors and industries to achieve these targets and ensure that each sector has the relevant skills it requires to achieve the Carbon Budget proposal.

For example,

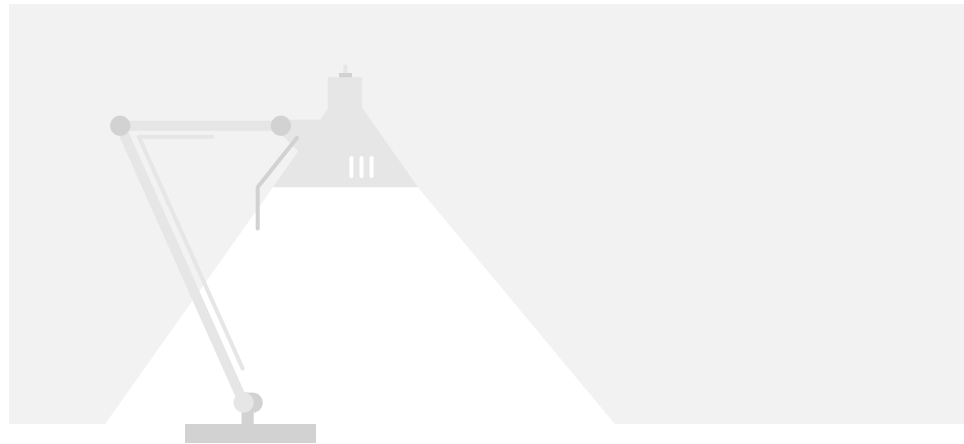
- Botanists may be required in construction (Green roofs, walls etc)
- Marine biologists required for energy production (off shore wind)
- Environmental specialists for assessing and project planning (construction)

In summary skill sets will be required in industries that were previously not required therefore it will be a challenge to ensure green skills can be utilised across multiple sectors. Veterans, refugees, ex offender, NEET pathways to skilled trades should be embraced.

Education & Skills

There is an imbalance in the region, where we have over representation of low skill low pay workforce and an under representation of highly skilled professionals, although University intakes in 2022 are at an all time high, Wales still lags behind England and NI in FE and HE rates.

Industry Sectors - Cluster Groups Research Findings and Insight



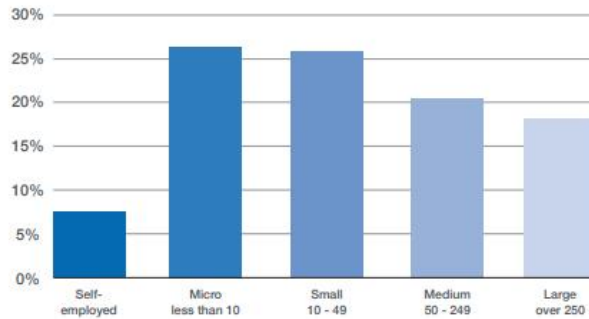
Methodology

Methodology

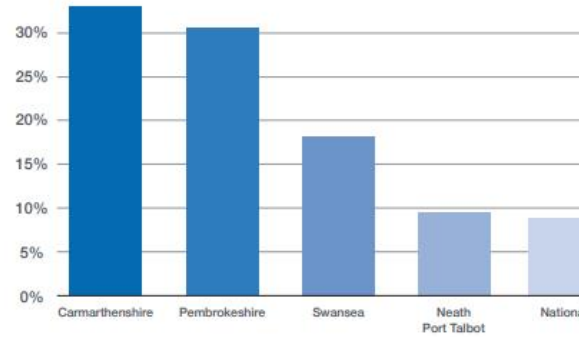
Over the past 3 years the South West Wales RLSP team have been gathering evidence from a number of sources to ensure the information available on skills challenges is robust and representative.

Using primary evidence from **491 Responses in the RLSP Employability and Skills survey** that ran from May to August 2022 using email to web data collection methods, targeting local employers, coupled with three annual cluster group meetings which span all industry sectors in the region, we have gathered a robust data set based on what skill challenges that are most needed for the region. Utilising secondary data and statistical information we are able to quantify the evidence gathered ensuring that the information contained within the plan is robust, representative and aligned to key priorities, best practice and policy.

Survey Results by Industry Size



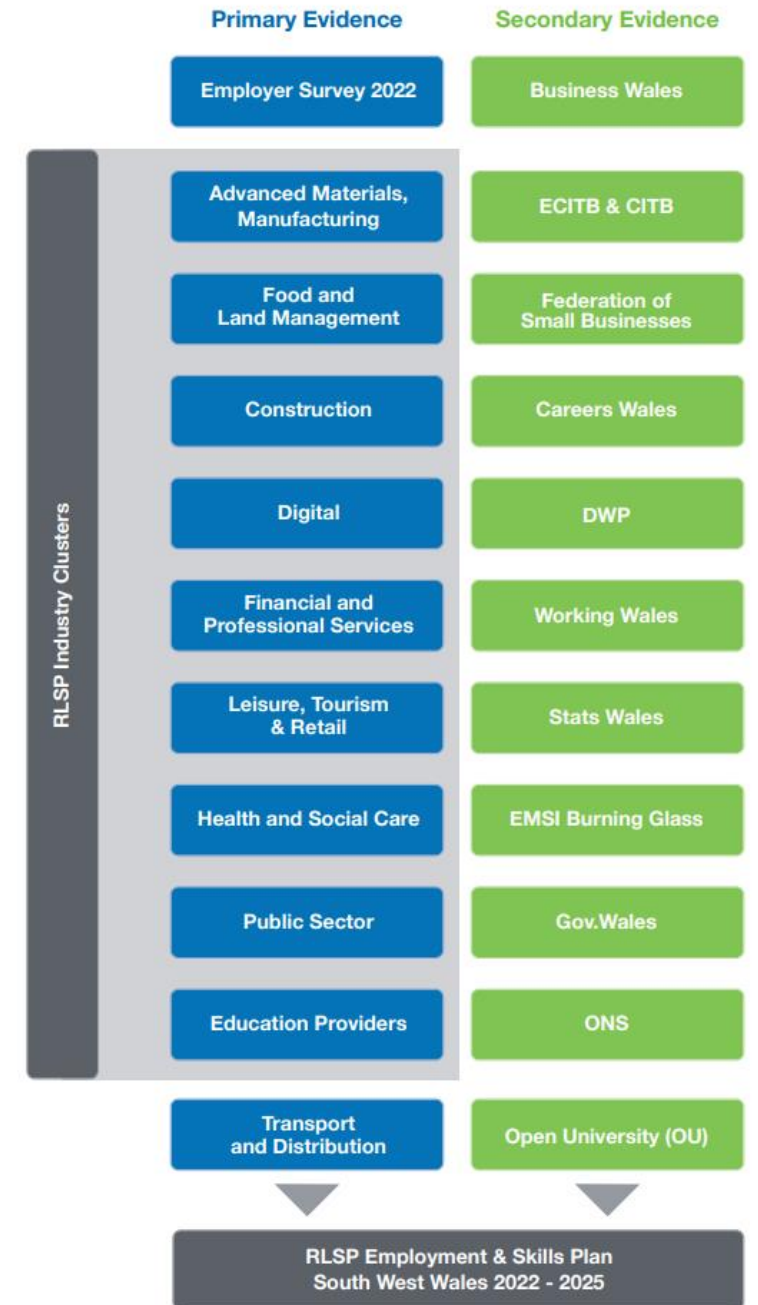
Survey Results by Industry Area



The Vision of Welsh Government

The skills landscape is shaped by what current vision Welsh Government have, the following is a brief summary of current policy documents that the plan is aligned with:

- Stronger Fairer Greener Wales Future Generations, Employability and Skills 2022
- Net Zero – Carbon Budget 2021-2025
- The New National Curriculum
- Cymraeg 2050
- Digital 2030
- Aligning the Apprenticeship Model with the needs of the economy 2017
- South West Wales Regional Economic Delivery Plan
- A Manufacturing Future for Wales
- Delivering Economic Transformation for a better future for work



Key Priorities – Overlapping themes affecting all sectors

Economy – Impact on Skills

The economy contracted by 0.1% in the second quarter of 2022, Office for National Statistics (ONS) reported. That compares to the first three months of this year when gross domestic product (GDP) - which measures economic activity - grew. However, 0.1% was much better than the 1.3% fall predicted by economists.

The Bank of England has forecast the UK will fall into recession towards the end of 2022 and the downturn will last for the entirety of 2023. The cost of fuel, energy and raw materials is widely reported as the main driver to the economic downturn as businesses have to reduce profits in line with higher operation costs and consumers have less disposable income due to increased energy costs.

According to the Open University's Business Barometer 2022 report, published in partnership with the British Chambers of Commerce, Welsh organisations are experiencing the knock-on effect of ongoing skills shortages and recruitment challenges, more than three quarters (77%) report seeing reduced output, profitability or growth with (69%) of SMEs are currently facing skills shortages and 70% stating it causes increased workload on current staff.

Mobility of Workforce / Population Density

With rising costs of fuel, this could also present a problem with workforce mobility especially in the more rural parts of the region. Pembrokeshire and Carmarthenshire have particular problems with a low population density (78 & 80 people per square km respectively with the two county's spanning just under 4,000 square km), meaning the cost of getting to / from workplaces and training & education is more of a challenge, potentially placing more demand for wage increases to help aid retention. The current economic situation can potentially have an effect on:

- Recruitment and retention
 - Workforce leaving to work more locally
 - Recruitment catchment area becomes smaller
- More demand for home working
 - How to measure productivity of a home workforce
 - Risk of losing skilled people to competitors offering more money and home working.
 - Bran Drain issue could rapidly grow worse

For Learners and Education providers, this also poses a challenge for potential course uptake. Reports from numerous employers state that not having the correct courses in their local area can be a barrier to employee development. However as demonstrated throughout the pandemic, training and education adapted very well to a blended learning approach for their students and can prove to be a future template for delivering courses across the region where mobility and time are a factor for learners.



Survey Findings – RLSP Skills Survey

34% of survey responses stated **Financial Issues** were a main challenge facing their business right now.



Of those who answered **Staff Retention** was a problem, **35%** stated **Geographical Issues** was the problem in retention.

Key Priorities – Overlapping themes – Work Readiness / Job sector Perception

Careers Advice / Work Experience

Careers advice and guidance has the power to change the life course of individuals which substantiates the importance of ensuring that young people (beginning at primary age) have access to representative and meaningful advice at every stage of their education. Not only does it affect life outcomes but it also has significant implications for social mobility and gender equality.

A leading report, authored jointly by educators and employers found that:

- *The patterns of jobs chosen by 7-year-olds mirror those selected by 17-year-olds.*
- *Gender stereotyping about jobs is set from a young age.*
- *Family, TV, radio and film have the biggest influence on children's choices.*
- *Children's career aspirations have little in common with projected workforce needs, which could have serious implications for the future's economy. This would suggest that despite the best efforts of many organisations and various government interventions, there remains a challenge in attracting individuals to sectors where there is real need.*

RLSP research indicated that the perception of a given sector was identified as a challenge by 20% of survey respondents. Cluster group feedback has reported this to be a significant issue with it being a barrier to recruitment and retention within certain industries mainly based on peer pressure and gender stereotypes being imprinted from a very young age, specifically in the following sectors: Construction, Manufacturing and Engineering, Food and Land management, Health and Social Care and Leisure and Tourism. A good case study where industry engages with education can be found here. [Kier | Engaging with local communities is key to addressing the skills gap in Wales](#) There are also schemes in place that develop life skills for younger people which develop entrepreneurial and technical skills, The Bumbles of Honeywood & EESW being a good example of this. [The Bumbles of Honeywood Archives - 2B Enterprising](#) / [The Engineering Education Scheme Wales \(EESW\) | EESW | STEM Cymru](#)

Greater Engagement between Careers Advisors, Teachers, Education providers and local employers would widen the knowledge of local skills requirements in education and work placement and this would potentially:

- Broaden young peoples' horizons and raise their aspirations
- Excite children about subjects they had potentially not known about, increasing motivation, confidence and attitude to learning
- Challenge gender and social stereotypes
- Improve academic attainment at GCSE
- Increase young people's earning potential
- Reduce the likelihood of young people becoming NEET
- Reduce the Brain Drain currently happening

Promoting and encouraging local skill availability at a younger age provides more insights to children for their pathways into later life and can enthuse them into a pathway potentially not previously known to the child. Better links between local industry and education is required.

<https://www.educationandemployers.org/drawing-the-future-report-published/>



Survey Findings - RLSP Skills Survey

Just **16%** of survey responders stated that new employees are **work ready**.

Having better engagement throughout the educational system with employers may address this problem.



67% of responders stated they would be **happy to offer work based placements**

There is clearly an appetite within industry to engage with the future workforce

Key Priorities – Overlapping themes – Young Persons Guarantee

Young Persons Guarantee

The Young Person's Guarantee is the Welsh Government's key commitment to provide everyone under the age of 25, living in Wales, with support to gain a place in education or training, and help to get into work or become self-employed.

It brings together a range of programmes and initiatives, which have been designed to provide the right support at the right time for the diverse needs of young people across Wales. The Welsh Government is asking businesses across Wales to commit to the Young Person's Guarantee and help make it a success by offering opportunities for young people to gain experience or take their first steps into the world of work through work experience placements, work tasters, apprenticeships or employment.

Other Welsh Government programmes and initiative that are available to support include:-

ReAct+

- Supports businesses to employ people who have recently been made redundant, or who are under notice of redundancy or have been made unemployed for any reason within the last 12 months, helping to fill skills gaps and keep recruitment costs down.
- Support is available as long as the new recruit has not started working for your organisation.
- From June 2022 onwards under ReAct+ eligibility will also include 18–24-year-olds not in education, employment or training (NEET).

[ReAct+ | Business Wales Skills Gateway \(gov.wales\)](https://gov.wales/business-wales-skills-gateway)

Personal Learning Account

Offers employed people the opportunity to gain the skills and qualifications they need to re-skill or upskill to overcome current and future skill shortages.

The programme can also support employers:

- Upskill staff by offering flexible courses and qualifications to meet skills gaps now and in the future,
- Access individuals who wish to switch careers and enter a higher level of employment, where career progression opportunities are available.



Key Priorities – Overlapping themes – Work Based Learning

Apprenticeships

2020/21 saw 4860 apprenticeships starts however around 10% dropped out within the first 8 weeks which places a financial burden on providers and employers. There has been a slow decrease in the number of apprentice uptake since 2018, although numbers may actually be higher, due to the pandemic learning programmes being extended. There has also been a recommissioning of the Apprenticeship Programmes, which resulted in a significant displacement of Apprenticeship learners and the commissioned network of providers reduced from 17 to 10.

The RLSP skills survey reported **67%** of employers in the region stating **recruitment** being the **biggest challenge**, also **73%** stating they have **difficulty in recruiting certain roles**, apprenticeship pathways could be a solution for some employers.

The majority of work based learning happens in Public Service and Healthcare, then Construction and Manufacturing. Digital, Energy & Environment have the lowest uptake

53% of surveyed businesses currently **don't employ apprentices**.

The difficulty here is the size of businesses in the region (consisting mainly of micro and small industry) these smaller employers detailed valid concerns reference the uptake of work based learning:

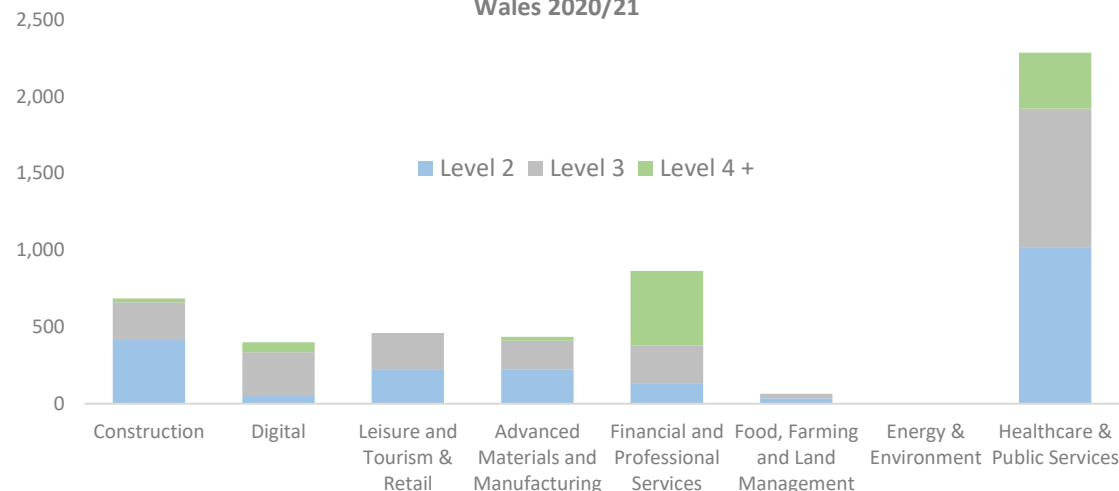
- Issues making the time to mentor / train an apprentice
- Apprentice framework does not fit their business model / needs
- Unsure of the process
- Difficulty in recruiting suitable candidates
- Mobility restrictions of younger workers / Location / Lack of training in the area
- Remote working culture makes it hard to mentor
- Need skilled "ready to work" workforce
- Financial constraints

RLSP Skills Survey

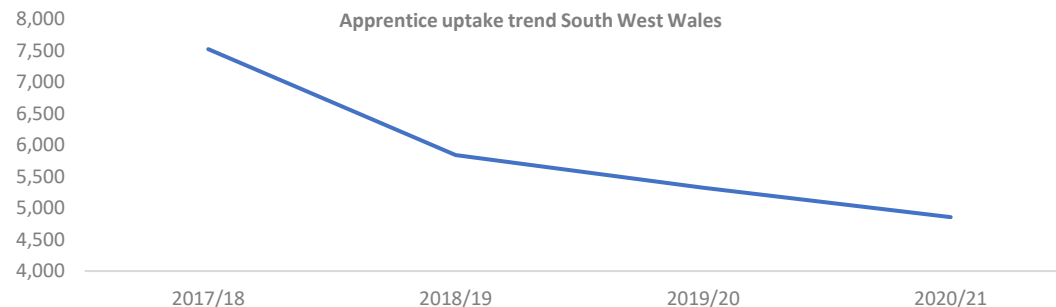


62% do not experience Barriers to Training

Apprentice uptake by sector South West Wales 2020/21



Apprentice uptake trend South West Wales



Future Planning in the Region - Upcoming projects

Regional Economic Delivery Plan

Mission 1

A UK leader in renewable energy and the net zero economy

- Dragon Energy Island
- Neath Port Talbot decarbonisation
- Domestic Retrofit / decarbonisation
- Carmarthenshire renewable energy projects
- Circular economy hub
- Freeport of Milford Haven
- Milford Haven energy
- STEP: Spherical Tokamak for Energy Production
- Global centre for rail excellence
- Swansea Bay and South West Wales Metro
- Pembrokeshire public transport interchanges
- Rail service improvements South West Wales
- Regional digital connectivity
- Pembroke Dock Marine

Mission 2

Building a Strong Resilient Business Base

- SWW Virtual innovation agency
- SWW Entrepreneurship & Enterprise
- Baglan Bay & Port Talbot Waterfront
- Freeport of Port Talbot
- Swansea Central North
- Carmarthenshire sound stage
- Pentre Awel, phase 2
- Haverfordwest airport redevelopment
- Pembrokeshire food park
- Local supplier development
- Skills and talent programme
- Support of SME's through procurement / growth and innovation
- Supporting new start ups.

Mission 3

Growing and Sustaining the experience offer

- Town centre regeneration
- NPT town centre regeneration
- Carmarthenshire rural initiatives
- Pembrokeshire town centres
- Small town and coastal zone regeneration
- Transforming Tyisha Llanelli
- Discover Pembrokeshire
- Regional waterways project
- Lower Swansea valley heritage & destination
- Carmarthenshire visitor experiences
- Pembrokeshire port infrastructure
- Affordable housing delivery

New West Wales Hospital

The new hospital is going to be built to a Biophilic design concept, this is an innovative approach to architecture that seeks to connect building occupants more closely to nature, incorporating elements such as natural lighting and ventilation, natural landscape features etc for creating a more productive and healthy environment for people. The project is worth £1.3 billion and includes the repurposing of existing hospital sites into new community sites for health. The health board aim to recruit local contractors not just to build the new hospital and new community sites, but to supply the maintenance on these sites moving forward.

City Deal

The Swansea Bay City Deal (SBCD) is an investment currently estimated to be worth £1.2bn across a portfolio of 9 major programmes and projects throughout the Swansea Bay City Region. The impact of the portfolio is based on generating at least £1.8 billion Gross Value Added (GVA) and providing at least 9,000 jobs to the region.

The 9 programmes and projects include:

Homes as Power Stations

Digital Infrastructure

Skills and Talent

Pentre Awel Wellbeing Village

Yr Egin Creative Hub

Pembroke Dock Marine

Supporting Innovation and Low Carbon Growth

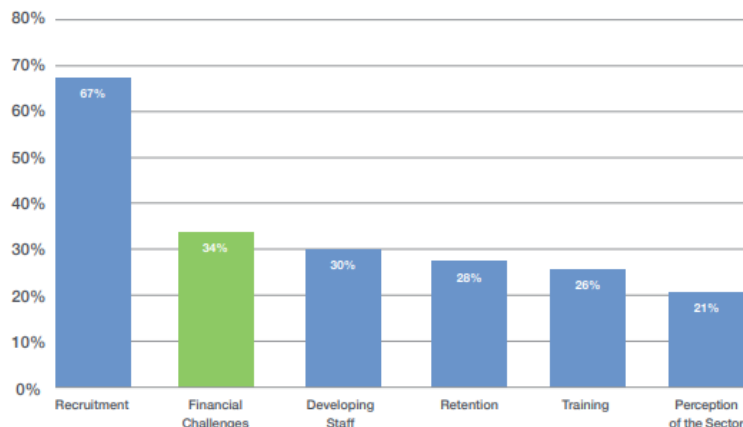
Swansea City Waterfront Digital District

Lifesciences, wellbeing and sports campuses

RLSP Skills Survey Overlapping themes • Skills & Recruitment • All Sectors

Main Challenges Facing Businesses

Recruitment is by far and away the biggest challenge at the moment to employers. However, many commented about **financial challenges**, be that internally or inflationary pressures, therefore when combining verbatim responses with actual answer response, **Financial Challenges becomes a major factor**.



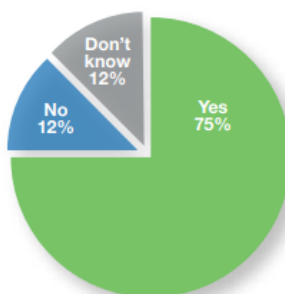
RLSP Skills Survey

Skills gaps Current

75% of survey responders stated they are planning on recruiting in the next 12 months, yet **55%** stated they currently experience skills challenges within their organisation. With **73%** struggling to recruit specific roles. Taken from open end verbatim responses the biggest skills requirements are:

- **Skilled trades**
Construction (all roles), Drivers, Chefs, Fabrication, Nurses, Care workers, Mechanics. Production, Administration
- **Professional Occupations / Management and Project Management**
- **STEM**
- **Health & Care professionals**
- **IT, Developers and Software professionals**
- **Logistics management**
- **Cross Sector Green Skills**

Planning on Recruitment?



RLSP Skills Survey

Soft Skills

17% of responders stated that new staff were work ready, the main issues of not being work ready mainly related to:

- Perceptions of the job role
- Low enthusiasm / motivation, poor attitudes
- Untidy/ ill disciplined
- Lack people skills (communication, problem solving etc)
- Lacking Experience / Skills / Qualifications

Many employers are now looking for correct attitudes to work rather than specific skills with a view to internal training and progression. **Work ready programmes / work experience have been requested from all sectors.** Key soft skills they now look for are:

- Communication skills
- Problem solving
- Leadership / ownership
- Product knowledge
- Computer literacy
- Understanding instruction
- Resilience
- Confidence

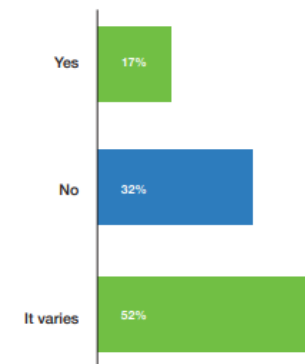
Future Skills

Although just **17%** stated they will be looking to recruit job roles aligned to the Net Zero agenda, Renewable Energy skills was the highest skill listed when asked what will be required in the future. Employers need more clarity on Net Zero obligations and opportunities. Extensive comments in relation to this question and prominent skills taken from those comments include:

- Digital / IT/ Programming / Software
- Nursing / Care
- Catering and Hospitality
- Leaders / Management / Project Leaders
- Teachers / Lecturers
- Ecology / Sustainability

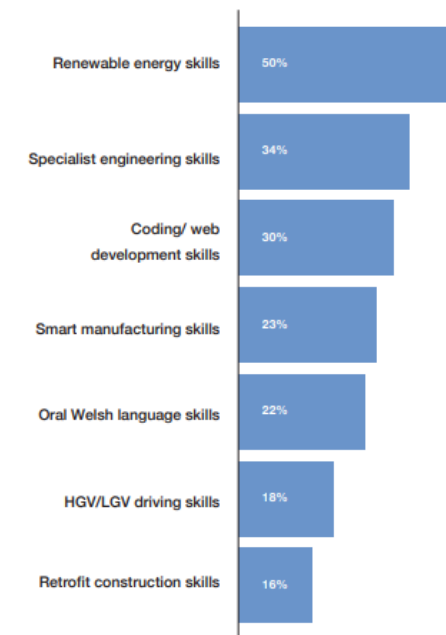
Many comments regarding future skills replicate current skill requirements.

New Entrants Work Ready?



RLSP Skills Survey

Skills Required - next 5-10 years?



RLSP Skills Survey

Future Skill Requirements

Future Skill requirements | What's needed...

Core transferable skills All Sectors

The region is lacking in key transferable skills.

STEM Knowledge

- Engineering and Technology
- Mathematics, Physics, and Biology
- Scientific and mathematical reasoning
- Environmental / sustainability sciences

Management and Leadership

- Management upskill pathways to be made available.
All sectors seeing issues with recruiting managers
- Business administration

Technical skills

- Technical equipment usage and repair

Digital and data skills

- Data problem solving
- Cyber Security, high level and to be included at some level in all developer / cloud applications
- Analysis
- Evaluation
- Computer sciences
- IT / Programming
- Cloud computing
- Social Media
- Smart Manufacturing / Disruptive Technologies
- STEM

Green (Net Zero) Skills

- System to underpin green skills to all job roles
(Like current H&S training)
- Specific Green skills in all sectors
- Upskill / reskill the current workforce
- Underpin all education and skills with "Green Knowledge"

Sector Specific Future skills

Energy

New project process, skill requirements

- Pre Consent
Design, Procurement, Survey, Early consenting works
- Consenting
Environmental Assessment / Scoping
- Pre – Construction
Survey, Design, Procurement, Site preparation
- Manufacturing
Cables, Turbines /Panels etc, Structures
Floating foundations, secondary equipment
- Construction
Fabrication & Assembly, Cable installation, transport & installation, substation installation, commissioning
- Operations
Monitoring, maintenance, operations

Energy Specialist knowledge

- Turbines
- Solar
- Hydro
- Nuclear
- Marine / Floating platform / Tidal
- Environmental
- Ecological
- Renewable technologies
- Energy Storage
- Carbon Capture / Decarbonisation
- High Voltage electrical engineers

Construction

- Retrofit (Trust Mark) assessors
- Net Zero sustainability in construction methods
- 3D printing / Robotics / Modern construction methods
- Materials

Sector Specific Future skills

Manufacturing

- Smart Manufacturing / Disruptive Technologies / Digital
- Materials (sustainability, circular material products)
- Energy storage manufacturing
- Battery manufacturing
- STEM

Tourism, Hospitality, Retail

- Sustainability
- Digital

Transport

- Electric vehicle mechanics
- Charging facility engineers
- Rail engineers
- Electrical engineers

Food and Land Management

- Better utilisation of blended learning
- Organic practices
- Food Production Scientists
- Woodland / soil management
- Environmental / Ecology / Sustainability
- Bee Keeping
- Horticulture
- Bio gas capture / storage
- Hydrogen powered machinery

Health and Social Care

- Dentistry
- Nursing
- Higher degree apprenticeships . Doctors surgeons etc
- Mental health workers

Education

- Educators at all levels to teach and deliver these new skills

Sector Landscape

Construction in the region had seen good growth over the last 2-3 years showing an 18% gain on 2018. The jobs market in the sector has been buoyant with many more skilled workers being employed since 2018. Great strides have been taken to fill the previous skills gaps reported, but this momentum needs to continue because skills gaps still remain and new skills will be required.

However, the current economic downturn and the inflationary rates for raw materials and fuel is a growing concern for this sector in the region. Although there is huge potential for future opportunity with Construction needing to play a key role in the delivery of Net Zero 2021 – 2025 carbon budget, all of the infrastructure work required for the policy sector targets will need this sectors support. In addition there will be more demand for retrofit in domestic dwellings. However in the survey, just 21% of Construction businesses said they would be actively looking to recruit Net Zero skills over the next 12 months.

Barriers and Opportunities

The concern being fed back is the sector is already seeing a loss in skilled staff members to larger companies conducting infrastructure works, examples given of electricians being poached to fit vehicle charging stations for the big oil companies, or for solar farms. In the RLSP skills survey only **27%** reported **staff retention to be an issue**. However a wider consideration is that **18%** of the workforce will be looking **to retire within the next 10 years**.

Sector perception of the future workforce is also of concern, with construction not deemed to be a valid career pathway for people in education. The sector is often seen as a low pay, poor conditions, long hours and environmentally unfriendly. This can create a lack of high quality candidates looking for a career pathway into the sector.

Within the South West Wales Regional Economic Delivery Plan many infrastructure projects are highlighted which the construction sector will be heavily involved in. Cross sector collaboration could be key here so construction can engage with Energy, Manufacturing and Digital sectors in order to maximise the opportunities available.

Training

Trust Mark for the retrofit process is on the close horizon, this will require already skilled construction workers to upskill ensuring that the planning and assessing job roles within that initiative are fulfilled as well as upskilling all roles to incorporate green technologies. The concern here is finding the suitable courses that are being run at a location and time that is convenient for those skilled individuals to take time away from work to attend. There is also concern over the availability of Teachers and Lecturers with the correct subject knowledge to deliver these courses. Already 62% of surveyed construction businesses say they are seeing barriers to training. Although the apprenticeship system is put to good use in this sector, the RLSP has received many suggestions from cluster groups on how the system can be updated.

99% of all construction businesses in the region are small or micro in size and do not always have the time, resource or buying power to adapt to these new challenges / opportunities facing them.

Recruitment - Work Ready

There were around 8,200 job postings in this sector between Jan 2021 and June 2022 of which 3,200 were unique. This means that most roles are being advertised at least twice in order to get filled: [Emsi Burning Glass 2022](#).

The Median average wage included in a job posting has increased 15.5% between April (£13.94p/h) to June 2022 (£16.09p/h)

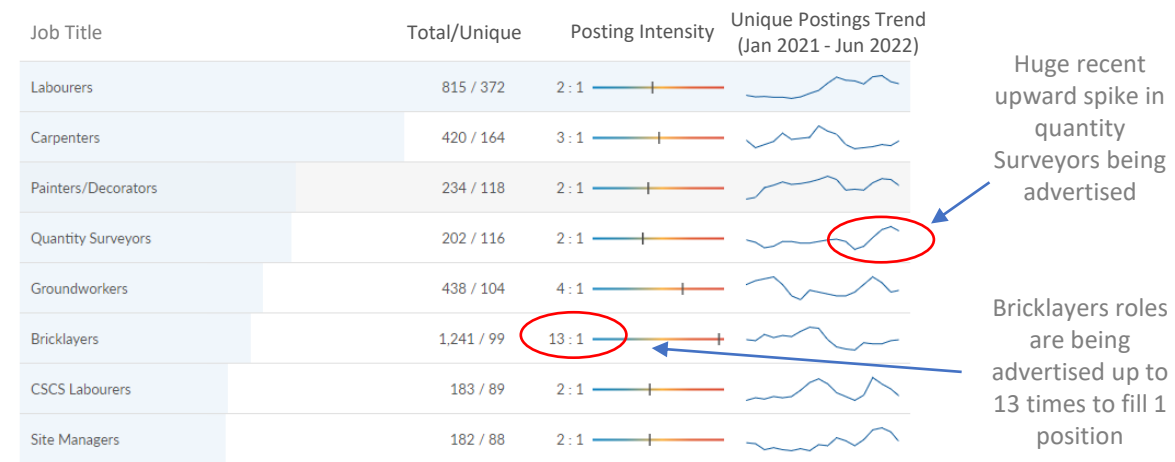
The most mentioned **Soft Skills** in job postings are:

- Leadership / Management
- Communication and Customer Service
- Operations
- Product Knowledge
- Work Ethic / Self Motivation
- Planning / Detail Orientation

With the RLSP skills survey detailing only **12% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings. In addition to the above RLSP have received feedback on:

- Reading / Numeracy

Most mentioned skills in Job Postings



Source: [Emsi Burning Glass 2022: Job Posting Analytics](#)



Construction

Workforce

3,112 Employers in Region

In 2021 employ 17,066 people, 19% more than in 2019

Business Size

- 93% Micro
- 6% Small
- 0.8% Med
- 0.2% Large

18% of workforce potentially retiring within next 10 years, 80% are Males

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 370 Foundation Apprentices
- 185 level 3
- 20 Level 4 or higher

Education in the Workforce

- 13,320 Educated between NVQ 1 – 3
- 2,941 Educated to level 4 or higher

Lack of qualifications available for timber frame housing and equipment design for new homes.

No Training providers in SWW offer a Groundworkers Apprenticeship.

Source: <https://statswales.gov.wales>

Sector Skills

Increases 2018 - 2022

- 24% increase of Electricians
- 31% increase in Scaffolders
- 39% increase in Roofers
- 26% increase in Plant operatives

Decreases 2018 -2022

- -14% in Plasterers
- -26% in Painters and Decorators
- -5% in bricklayers

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 70% have difficulty in recruiting specific roles
- 69% are planning to recruit within 12 months
- 27% stated staff retention is an issue
- 73% of surveyed employers have apprentices



Key Findings

Skills Survey 2022 - 65 survey responses

Challenges

- **Recruitment**
Perceptions of the sector
Low Wages
Low amount of applicants/ too much competitive choice
- **Training and Developing Staff**
12% stated new staff are work ready skills / qualifications, experience and poor attitude being the main negative factors
- **Financial Issues**
Cost of raw materials
Inflationary pressures / Fuel
- 69.5% reporting skills challenges.
Most prevalent areas:
Skilled trade and plant operation roles
Professional roles, e.g. Purchasing, Planning. Management etc
- 37% Experience barriers to training.
Most prevalent areas:
Lack of funds
Visibility and availability of training
Course flexibility
Time restraints
Lack of quality local providers
- 21% potentially planning to recruit
Net Zero job skills

Actions

Replace a retiring workforce

Continue to ensure the good flow of skilled trades, apprenticeships urgently needed in the following trades

- Painters and Decorators
- Plasterers
- Bricklayers

Embrace new automated technologies

Teachers and Lecturer availability, Specific pathways

- Trust Mark
- Renewables / Sustainable materials
- Timber Frame
- Steel Frame
- Groundworks

Upskill for Trust Mark / MCS

- Better utilisation of blended learning

Update current learning to include new construction guidance

Most difficult to recruit roles advertised job roles are

- Bricklayers
- Groundworkers
- Painters and Decorators
- Plasterers
- Welders
- Pipe fitting
- Electrical / engineers / fitters / designers
- Supervisors / site managers
- Mechanical engineers / fitters



Sector Landscape

Manufacturing in the region has shown a small amount of growth since 2018 (0.8%), compared to the nation average which has seen a 7.1% drop so the region has managed to remain buoyant. Neath Port Talbot is the largest employer in the region however the numbers of people employed has remained relatively static with small amounts of growth since 2011. Carmarthenshire is the next biggest employer with jobs increasing at a steady rate since 2011, although there was a small employment dip in 2019. Swansea being the 3rd largest employer in the region for the sector has seen 3.8% jobs growth, posted the most job adverts and is contributing greatly to the regions job growth figures [Emsi Burning Glass 2022](#). However the current economic downturn and the inflationary rates for raw materials, fuel and supply chain issues are growing concerns for this sector which is already only just managing to stay on the growth trajectory.

Barriers and Opportunities

Recruitment and Staff Development are large concerns for the sector, the feedback received suggests that sector perception and wages are a concern due to potential candidates choosing to work in unskilled professions from other sectors. Couple this with an ageing workforce, new talent must be attracted to the sector. Manufacturing will play a huge role in the delivery of Net Zero and decarbonisation, also based on the 2019 Welsh Government policy to implement 4.0 Industry 1, and the 2021 policy A Manufacturing Future for Wales 2021 2 embracing digital technology will be vital to address skills gaps and deliver continued growth. There are plans in place for 1,000 new jobs in battery manufacturing in the region where coal and minerals will be used as an alternative to lithium, it is this type of innovation that the region will need to embrace. (DST Innovations)

Training

The sector has utilised the apprenticeship system to good effect (58% of surveyed companies currently take them) however there have been many reports of failure to attend interviews, or candidates rejecting the job offer and even in a few cases new apprentices leaving on the first work day. Perception of the sector and work attitudes need improvement and placing a firm focus on STEM and digital 4.0 skills would attract talent.

[2 MADE Cymru](#) claim that the future is within Disruptive Technologies and it is vital that manufacturing embrace digital technologies moving forwards, they claim. For the Welsh economy to thrive, it's vital that our manufacturers are well versed in how to use the latest disruptive technologies, therefore an expansion of STEM, Material and Digital skills are required.

Summary

Welsh manufacturers will play a vital role in transitioning Wales towards a Net Zero economy and digital 4.0. It's crucial to address the way resources are used by transitioning to a circular economy, keeping materials in use for as long as possible and avoiding waste.

Innovation in companies and local enterprises show how being more efficient in the materials we use can deliver considerable economic benefits. To support this, Welsh Government have committed to expanding their circular economy fund for business, with £10 million allocated over the next three years.

[1 Delivering Economic Transformation for a Better Future of Work \(gov.wales\)](#)

[2 A Manufacturing Future for Wales \(gov.wales\)](#)

[3 The role of Welsh industry in tackling climate change | MADE Cymru](#)

Recruitment - Work Ready

There were around 5,500 job postings in this sector between Jan 2021 and June 2022 of which 2,550 were unique. This means that most roles are being advertised at least twice in order to get filled.

The Median average wage included in a job posting has increased 17.3% between December 2021 (£10.68p/h) to June 2022 (£12.52p/h)

The most mentioned **Soft Skills** in job postings are:

- Leadership / Management
- Communication
- Digital Orientation
- Operations
- Customer Service
- Quality Control
- Planning
- Problem Solving

Source: [Emsi Burning Glass 2022](#):

In the RLSP skills survey only **7% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings. In addition to the above, RLSP have received feedback on:

- Sector and Product Knowledge
- Basic Reading and Numeracy

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Unique Postings Trend (Jan 2021 - Jun 2022)
Production Operatives	612 / 321	2 : 1	
Production Operators	397 / 154	3 : 1	
Machine Operators	140 / 77	2 : 1	
Spray Painters	90 / 50	2 : 1	
Manufacturing Operators	112 / 44	3 : 1	
Turners	91 / 43	2 : 1	
Assembly Operators	85 / 41	2 : 1	
CNC Machinists	90 / 36	3 : 1	
Builders	101 / 36	3 : 1	
CNC Mill Operators	73 / 29	3 : 1	

Production Operatives and Operators being the most in demand job posting skill

Recent drop in adverts for Turners and CNC Machine operatives



Advanced Materials & Manufacturing

Workforce

In 2021, 1,222 Employers in Region

- 81% Micro
- 13% Small
- 5% Med
- 1% Large

Employ 21,071 people, 0.8% more than in 2019, 20% of workforce potentially retiring within next 10 years, 76% are Males.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 175 Foundation Apprentices
- 140 level 3
- 5 Level 4 or higher

Education in the Workforce

- 14,946 Educated between NVQ 1 – 3
- 5,524 Educated to level 4 or higher

Source: <https://statswales.gov.wales>

58% of surveyed employers have apprentices

Sector Skills

Increases 2018 - 2022

- 19% increase of Iron / Steel Manufacturers
- 6% increase in Production Managers and Directors in Manufacturing
- 4% increase in Elementary Process Plant Occupations

Decreases 2018 - 2022

- 8% drop in Metal Working Production and Maintenance Fitters
- 10% in Assemblers
- 11% in Metal Working Machine operators

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 80% have difficulty in recruiting specific roles
- 74% are planning to recruit within 12 months

Next 5-10 Years Skill Requirements

- Specialist Engineering
- Smart Manufacturing
- Renewables
- Digital coding / web

Key Findings

Skills Survey 2022 - 27 Responders

Challenges

- Recruitment issues - 70% are planning on recruiting in the next 12 months yet 80% stated they have difficulty in recruiting
 - Competition from other employers
 - Low Wages
 - Low amount of applicants / lack of interest in the sector
 - Geographic locations
- Training and Developing Staff
 - 7% stated new staff are work ready
 - Skills, Experience and poor motivation / attitudes are being the main negative factors
- 60% reporting skills challenges spanning. Most prevalent areas:
 - Skilled trade and process machine operations
 - Professional roles, e.g. Purchasing, Planning. Management etc
- Soft Skills Challenges
 - Problem solving
 - Leadership / Ownership
 - Communication skills
 - Basic Numeracy
- 15% potentially planning to recruit Net Zero job skills

Actions

Sector to engage with pre and post 16 education

Fit for work programmes to ensure relevant general job skills are covered. Such as:

- Leadership / Management
- Communication/ written / verbal / understanding and or issuing instruction
- Digital Oriented
- Numeracy
- Operations
- Customer Service
- Quality Control
- Planning / Detail Oriented
- Problem Solving

Showcase Disruptive Technologies / Industry 4.0 technologies to the sector.

Skills needed now:

- Production Operatives
- Machine operatives
- Manufacturing Operations
- Engineering skills
- Mechanical skills

Raise awareness of the Net Zero Carbon Budget to showcase the opportunities

Cross sectoral cooperation. Create a skill pool that can service cross over industries

- Welders
- Engineers
- Metal workers
- Machine operators

Sector Landscape

Heath and Care in the region is one of the biggest employment sectors employing over 46,000 workers with Care workers and nurses being the highest volume jobs. The NHS being the largest employer. However 94% of the employers in the sector are small or micro and these make up a large share of other important health requirements such as Dentistry and Care.

Although Nurses are the most intensely advertised role in the region, Nurse numbers have remained consistent with pre 2018 levels along with healthcare professional and medical practitioners, this could be in part due to the large uptake in apprenticeship pathways for these occupations, but other roles are in high demand and there are huge losses in the workforce specifically within Care and Dentistry.

Barriers and Opportunities

We have seen around 600 less workers in Care since 2018 and around 200 less Dental nurses, Emsi Burning Glass 2022 feedback from the clusters is that they are seeing a combination of factors that is driving this decline in numbers and barriers to recruitment and retention. In Care specifically, during the pandemic there was a lot of negative press about the sector. This would have created a poor perception of potential employees thinking about a career in Care. Other negative perceptions are low wage rates and unsociable hours. Qualifications may also be a barrier especially with part time worker as the education process is often unpaid. These negative perceptions could be causing candidates to choose work in unskilled professions from other sectors. With an ageing population within the region, the future predicts an increased pressure on the entire Health & Care system.

Training

Healthcare, coupled with Public Sector, have the highest intake of apprenticeships with 81% of all learners being female, however **59%** of employers surveyed **do not employ apprentices** citing issues such as low application levels, frameworks do not match the needs and employers being unsure of the process. So even though this sector has the highest work based learning uptake in the region, this throughput is not being distributed across the sector sufficiently. 41% of surveyed employers stated they still have barriers to training, the main feedback received for these barriers are finding the time for the staff to complete the training and financial constraints. There is a huge appetite within the sector to offer work **based placements (68% would be willing)**.

Summary

With the ageing population and the Healthcare sector being one of the biggest employers in the region there are some key challenges ahead in all industry types within the sector. Although healthcare professionals and nurse roles are similar to 2018 levels, there will be a need for increased staffing levels in the coming years. The smaller employers in the region providing vital care and dentistry requirements are particularly struggling right now and require immediate support and a longer term support plan to fill the skills gaps they currently have.

Recruitment - Work Ready

There were around 111,082 job postings in this sector between Jan 2021 and June 2022 of which 21,009 were unique. This means that most roles are being advertised up to 5 times in order to get filled.

The Median average wage included in a job posting has increased 16.5% between December 2021 (£11.54p/h) to June 2022 (£13.45p/h)

The most mentioned **Soft Skills** in job postings are:

- Communication
- Welsh Language
- Teaching
- Leadership / Management
- Customer Service
- Enthusiasm
- Compassion
- Problem Solving / Planning

Source: Emsi Burning Glass 2022:

With the RLSP skills survey reporting only **14% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings. In addition to the above, RLSP have received feedback on:

- Computer Literacy
- Reading and understanding instruction

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Median Posting duration
Support Workers	8,977 / 3,003	3 : 1	36 days
Care Assistants	2,522 / 890	3 : 1	36 days
Teaching Assistants	1,590 / 708	2 : 1	31 days
Staff Nurses	12,819 / 583	22 : 1	40 days
Registered Nurses	4,383 / 555	8 : 1	36 days
Registered General Nurses	2,641 / 482	5 : 1	34 days
Residential Support Workers	1,253 / 396	3 : 1	36 days
Health Care Assistants	795 / 308	3 : 1	32 days
Home Care Assistants	1,870 / 257	7 : 1	31 days
Health Care Workers	3,924 / 247	16 : 1	31 days

Staff Nurses are the most frequently posted roles, with 22 adverts being posted to fill one position

Care Workers are also deemed as a hard to fill role with a maximum posting ratio of 16 -1



Health & Social Care

Workforce

In 2021, 1,801 Employers in Region

Business Size **Jobs rise / fall since 2018**

- 55% Micro
- 39% Small
- 6% Med
- 1% Large
- Pembrokeshire -1,285
- Swansea -1928
- Carmarthen -273
- Neath Port Talbot +494

Employ 46,982 people, 6% less than in 2018.
22% of workforce potentially retiring within next 10 years, 78% are Females

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 1915 Foundation Apprentices
- 1900 level 3
- 920 Level 4 or higher

Education in the Workforce

- 24,824 Educated between NVQ 2 – 3
- 20,025 Educated to level 4 or higher

Source: <https://statswales.gov.wales>

Sector Skills

Increases 2018 - 2022

- 4% Midwives
- 7% Nursery Nurses
- 4% Welfare professionals
- 6% Occupational Therapist
- 6% Radiographers

Decreases 2018 -2022

- 5% Care Workers
- 5% Senior Care workers
(Note: this equates to 600 less people since 2018)
- 23% Dental Nurses
- 11% Pharmaceutical Technicians
- 21% Animal Care services / 33% Veterinarians
- 27% Veterinary Nurses

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 82% have difficulty in recruiting specific roles
- 90% are planning to recruit within 12 months

41% of surveyed employers have apprentices, of those that don't:

- Framework does not fit needs
- Unsure of the process

49% say they experience barriers to training

- Time & Funds being the biggest drivers

Key Findings

Skills Survey 2022 - 77 survey responses

Challenges

- Recruitment
Retention
Financial Challenges
Developing Staff
Training
Sector Perception
- Training and Developing Staff
18% stated new staff are work ready Skills, Qualifications, Experience and poor motivation / attitudes are being the main negative factors
- 51% reporting skills challenges.
Most prevalent areas:
Care / Elderly and Child
Health Care
Professional roles,
Management
- Soft Skills Challenges
Communication skills
Computer Literacy
Leadership / Management
Welsh Skills
Reading and understanding information
- 57% stated Staff Retention is an issue
No Interest in this sector
Unsocial Hours
Low Wages

Actions

Health Care

- Industry Perception work with pre 16 education to improve perceptions
- Post 16 Work experience processes
- Perceived qualification barriers

Pathways / Degree Apprenticeships to

- Leadership and management
- Doctorates
- Surgeons

Staff Retention / Recruitment

- Qualifications a barrier especially for part time workers, study time is not paid
- Mobility

Skills needed now / Most advertised job roles

- Carers / support workers (Urgently required)
- Staff nurse
- Dental

Equip workers with relevant soft skills prior to employment. The most mentioned Soft Skills in job postings are:

- Communication
- Welsh Language
- Understanding written instruction
- Leadership / Management
- Computer literacy
- Enthusiasm / Compassion
- Problem Solving / Planning
- Resilience

Digital Skills

- Losing staff to private companies, how to retain digital skills?





Sector Landscape

The Pandemic had a huge impact on this sector particularly within the small and micro businesses in the region which make up 98% of employers. Not only were there initial financial impacts, the longer term effects around attracting staff back to the sector are starting to become apparent. With retail being Wales's biggest private sector employer, coupled with Hospitality & Leisure this sector is crucial for providing accessible and flexible jobs, with opportunities to develop valuable and transferrable soft skills, (the sector serves as an important entry point for many young people entering the job market and is often described as providing the nation's favourite and best first job.) However the region is seeing huge job decline in practically all types of non essential business within this sector. Feedback from the cluster group compounds this issue with many hospitality proprietors stating they operate on a skeleton team. The pandemic hangover is the main reason provided for the difficulty in recruitment, because it highlighted the vulnerability of job and health security in these business areas. It is worthy of note that a similar number of businesses (in many cases more) are operating in this sector as was in 2018, so the loss of jobs in this sector cannot be directly attributed to pandemic business closures.

Barriers and Opportunities

Workforce problems are the main barrier to growth for this sector, and actions are urgently required to encourage people back to this sector. There is huge opportunity in the region for Hospitality and Leisure with more people choosing staycations versus travelling abroad, but trying to maximise on this culture shift is a challenge with workforce recruitment being so problematic. Non essential retail has its own challenges, with less footfall on the high street and online shopping from large corporations becoming the norm, local retail faces challenging times ahead, but there is becoming increased demand from socially responsible shoppers for boutique & locally produced products, due to the need to reduce carbon footprints, and this is a growing market to tap into.

The sector is known for innovation and creativity, Hospitality businesses have proven to be incredibly resilient and have adapted their operations in a range of different ways – from providing takeaway meals and home food kits to embracing new technology and maximising the use of outdoor space. Traditional local high street retail offering more online shopping services and embracing digital processes. This adaptability offers a blueprint for the future and provides hope that the businesses who have survived during the pandemic, and those that follow, could emerge stronger than before. Given the rising cost of energy, current economic uncertainty and attracting staff it is vital that this sector take advantage of the changing retail and leisure landscape,

Training

The majority of training in the sector happens internally and on the job, which has benefits and drawbacks, the drawbacks being that often the sector is considered low skill low pay with limited career progression. The benefits however being that teams can be flexibly on job trained to the specific outlets needs, creating a resourceful team.

Some extracts taken from: [New vision to secure a bright future for Wales' retail sector | GOV.WALES](#)

Recruitment - Work Ready

There were around 17,037 job postings in this sector between Jan 2021 and June 2022 of which 7,578 were unique. This means that most roles are being advertised up to 2 times in order to get filled.

The Median average wage included in a job posting has increased 8% between September 2021 (£9.26p/h) to June 2022 (£10.00p/h)

The most mentioned **Soft Skills** in job postings are:

- Customer Service
- Communications
- Cleanliness
- Leadership / Management
- Detail Orientation
- Enthusiasm / Energetic
- Sales
- Training and Development

Source: Emsi Burning Glass 2022:

With the RLSP skills survey reporting only **14% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings. In addition to the above, RLSP have received feedback on:

- Computer Literacy and IT technical skills.

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Median Posting duration
Cleaners	1,754 / 756	2 : 1	35 days
Kitchen Assistants	611 / 296	2 : 1	28 days
Team Members	713 / 245	3 : 1	31 days
Wait Staff	536 / 213	3 : 1	37 days
Chefs	415 / 171	2 : 1	32 days
Kitchen Porters	322 / 164	2 : 1	36 days
Baristas	380 / 160	2 : 1	31 days
Catering Assistants	417 / 152	3 : 1	37 days
Cleaning Operatives	262 / 151	2 : 1	33 days
Housekeepers	452 / 144	3 : 1	36 days

The majority of postings are for team members, very few postings are looking for managers / team leaders.

Source: Emsi Burning Glass 2022: Job Posting Analytics



Leisure, Tourism & Retail

Workforce

In 2021, 13,020 Employers in Region

Business Size **Jobs rise / fall since 2018**

- 83% Micro • Pembrokeshire +399
- 15% Small • Swansea -3,333
- 1.9% Med • Carmarthen -587
- 0.1% Large • Neath Port Talbot +578

Employ 73,475 people, 5.3% less than in 2018,
53% are Males, 47% Female

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 130 Foundation Apprentices
- 180 level 3
- 25 Level 4 or higher

28% experience barriers to training

36% of surveyed employers have
apprentices

Source: <https://statswales.gov.wales>

Sector Skills

Increases 2018 - 2022

- 16% (96) Hotel Managers and Proprietors

Decreases 2018 - 2022

- 7% (985) Retail and Cashier assistants
- 8.3% (361) Chefs Cooks & Catering assistants
- 38% (603) Publicans & Managers of Licenced trade
- 5% (139) Managers in Retail
- 31% (288) Pharmacy dispensing assistants
- 29% (107) Bakers and Confectioners

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 70% have difficulty in recruiting specific roles
- 76% are planning to recruit within 12 months

Next 5-10 Years Skill Requirements

- Renewables
- Digital
- Welsh Language

Key Findings

Skills Survey 2022 - 100 Responders

Challenges

- **Recruitment**
Financial Challenges
Seasonality
Developing Staff
Sector Perception
Transport links (Mobility)
- **Training and Developing Staff**
14% stated new staff are work ready
Poor Attitudes, Lack of Experience, Low Motivation and confidence, are highlighted as the main negative factors
- **47% reporting skills challenges.**
Most prevalent areas:
Skilled Trade Chef / Kitchen
Leisure and Service
Professional roles,
Management
- **Soft Skills Challenges**
Communication skills
Problem Solving
Knowledge
IT and Technology
Leadership / Management
Resilience
- **38% stated Staff Retention is an issue**
No Interest in this sector
Unsociable Hours / Mobility links
Low Wages / competition

Actions

Apprenticeships

- Improve visibility of programmes to small and micro, market the programmes
- Easier to access, less bureaucracy
- Qualification differences between England and Wales
- Attracting older people to the sector

Mobility

- Options on mobility, for younger / unsocial hour workers

Net Zero

- Better visibility to business owners on roles and responsibility / opportunities

Equip workers with relevant soft skills prior to employment. The most mentioned Soft Skills in job postings are:

- Customer Service
- Communications
- Personal Hygiene
- Leadership / Management
- Detail Oriented
- Enthusiasm / Energetic
- Sales
- Training and Development

Skills needed now / Most advertised job roles

- Cleaner / Housekeeper
- Chef / Kitchen assistants
- Baristas
- Waiting Staff

Sector Landscape

South Wales is the second biggest industrial and power emitter of carbon in the UK, with over 16m tonnes of CO2e per annum but around 90% of those emissions are produced by 3 companies. (swic) Traditionally the region has an industrial heritage in Black Industry, (coal, petroleum etc,) but there is now a real focus to shift away towards a renewable energy leading region

Many feasibility studies and projects are already underway for energy production and decarbonisation in the region with skills shortages being a hot topic amongst all of those projects. Examples include Pembroke Dock Marine off shore wind and tidal, DARE in Neath Port Talbot, Dragon Energy Island, The Hydrogen Centre, Blue Eden Project and utilising “black industry” to produce coal for battery making rather than burning. All of these new projects will require new, existing and transferable skills to set up and operate into the future.

Barriers and Opportunities

SWIC is a Regional Cluster group conducting feasibility studies into the industrial decarbonisation of the region aligned to WG Net Zero agenda and have compiled a skills requirements document to align with industrial decarbonisation. They have highlighted within the report specific barriers to skills that are being encountered, detailed below.

SWIC Skills Barriers: *Authorities have been slow to act: Policy (whether discussing Net Zero or decarbonisation) is not best aligned in relation to industry and education: Bureaucracy, Education and Education funding. Also highlighted was a cultural issue where “old fashioned attitudes towards industry are still prevalent.*

Source: SWIC Skills required for industrial decarbonisation and getting to Net Zero

However the opportunities in the region are abundant. Around 20% of UK energy supplies enter Britain via Pembrokeshire and within the SQW Economic Delivery Plan, South West Wales aims to be the UK leader in renewable energy over the next 10 years.

Training

Some industries have made connections with FE and HE but not all, and improvements in this relationship, with support offered to drive this are required. A concerted effort is required from industry, educational institutes, and local councils to consider the challenges ahead and collectively identify solutions based on energy security, resilience and a prosperous future.

The need for appropriate skills and environmental literacy are crucial for the success of meeting net zero goal. Education programmes that are affordable and accessible for the uptake by both private and public sectors need to be developed.

In addition, new pathways need to be opened to reskill once considered “Black Industry” jobs into the new renewable energy sector.

Recruitment

This sector really needs to be thought of in terms of a new market that requires skills that slot into all levels of that new market, the concern is skills demands in this sector will be filled at the expense of other sectors like Construction, Manufacturing, Finance and Professional and of course digital who are all facing their own current skill challenges. In a 2022 report by Marine Energy Wales, they claim the current employment breakdown is:

35% Construction and Fabrication

25% Technical

12% Design

12% Project Service

11% Business development

6% Operations & Maintenance

[Read our 2022 State of the Sector Report | Marine Energy Wales](#)

Career Pathways are urgently required for:

- Skilled Trades : Pipe fitters, Engineers, Electrical Engineers, Welders
- Stem Skills: Scientific, Ecological, Environmental, Technology
- Management Skills: Project Management, Procurement, Surveying

All underpinned with “Green Knowledge” need to be created in addition to the current requirements for these skills in other sectors

A comprehensive list of skills required for the planning, construction, manufacture and operation of a new offshore floating wind power system can be found in the below report created by Catapult: Risks to project development – People, Skills and vocations

catapult.org.uk)

The below figure taken from the SWIC Skills Plan for South Wales, it highlights the requirements and who would need to be involved in the delivery to ensure there is an ecosystem of support and a clear pathway to address the skill requirements.

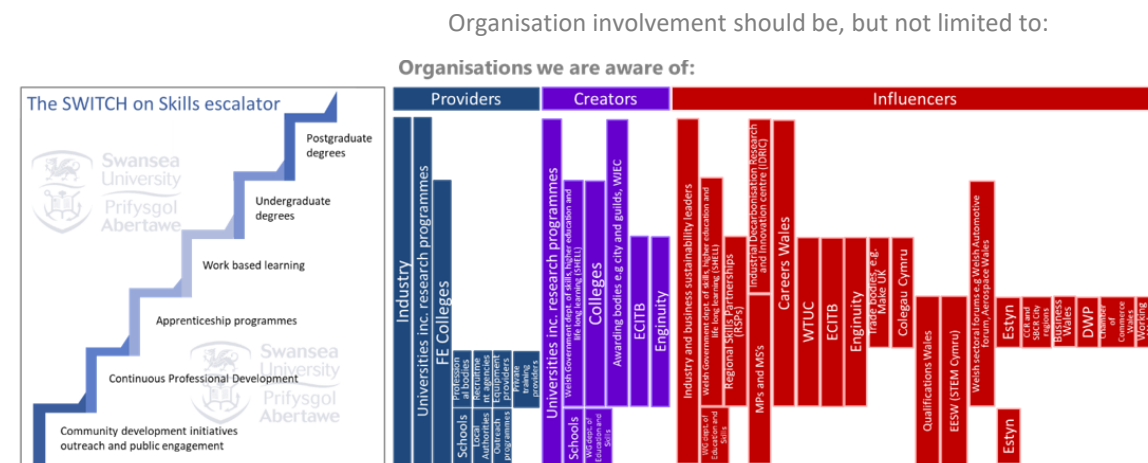


Figure 1 – Current SWIC understanding of what organisations are influencers, creators of new skills provisioning and providers of skills training, mapped against the SWITCH on Skills escalator by Swansea University on the left-hand side



Energy & Environment

Workforce

In 2021, 199 Employers in Region

Business Size	Jobs rise / fall since 2018
• 69% Micro	• Pembrokeshire +11
• 23% Small	• Swansea -79
• 8% Med	• Carmarthen -197
	• Neath Port Talbot +1329

Employ 3,951 people, 34% more than in 2018, 81% are Males, 19% potentially due to retire in next 10 years

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

ALERT: Limited pathways for Energy

Apprenticeships required

- High Voltage Electrical
- Jointers, Fitters, Connectors
- Senior Authorised Persons
- Marine Architects
- Control Instrumentation
- Mechanical & Design Engineers

36% of surveyed employers have apprentices
42% experience barriers to training

- No Framework for Net Zero
- No capacity to train
- Recruiting difficulty

Next 5-10 Years Skill Requirements

- Renewables
- Specialist / Smart Engineering
- Digital, Coding Web
- Construction

Sector Skills

Requirements for Infrastructure projects Transversal skills

- Systems thinking / Communication / Leadership
- Environmental awareness / Circular economy
- Environmental policy engagement
- Digital skills

Technology based skills

- Hydrogen / Renewable power generation
- Battery production
- Carbon capture / Circular design
- Turbine Inspectors

Occupational job profiles

- Welders / Pipe fitters / Electricians / Engineers

Education and training

- STEM, EDI and training curricular

Source: Catapult: Risks to project development
– People, Skills and vocations

Skills Survey 2022

- 68% have difficulty in recruiting specific roles
- 75% are planning to recruit within 12 months

Key Findings

Skills Survey 2022 - 20 Responders

Challenges

- Recruitment
Developing Staff
Training
Retention
Bureaucracy / Legislation
- Training and Developing Staff
26% stated new staff are work ready
Skills Required, Work Experience,
Qualifications are the main negative factors
- 52% reporting skills challenges.
Most prevalent areas:
Management / Professional
Skilled Trade
- Soft Skills Challenges
Leadership / Management
Renewables
Communication / Problem Solving
Knowledge of Products
Technology
- 33% stated Staff Retention is an issue
Mobility links
Low Wages / competition

58% plan on employing based on the Net Zero agenda

Actions

Update qualifications as a matter of urgency

Consider a new sector with skills required for all parts of the sector set up

- Pre Consent
Design, Procurement, Survey,
Early consenting works
- Consenting
Environmental Assessment / Scoping
- Pre Construction
Survey, Design, Procurement, Site preparation
- Manufacturing
Cables, Turbines /Panels etc, Structures /
Floating foundations, secondary equipment
- Construction
Fabrication & Assembly, Cable installation,
transport & installation, substation installation,
commissioning
- Operations
Monitoring, maintenance, operations

Apprenticeships into the sector, to appropriate suitable skills required:

- High Voltage Electrical Engineers
- Jointers / Fitters / Technicians / Connectors
- Control installation
- Senior Authorised Persons / Authorised Persons
- Marine Architecture
- Large Structure Project Managers

New pathways could be opened to reskill:

- "Black Industry"
- Ex service personnel
- Ex offenders



Sector Landscape

By 2027 untargeted direct payments to farms will stop and the system will be replaced with a process to pay farmers for environmental improvements and sustainable land management (SLM) methods. This will of course be a big shift for food producers in the region who will have to consider the benefits and impacts of this new system. With livestock farming the main agricultural activity in Wales employing around 18,000 people, (ONS) the shift will not be an easy one with producers being encouraged to adopt low carbon technologies as they become available and allocate 10% of all farming land to support tree planting. With less grazing land, this may mean some livestock farmers may have to look into more horticulture and mixed farming practices.

Food production, packaging, wholesale and distribution will have to work closely with the farming communities and consumers to ensure that sustainability in the food chain is achieved. Small changes in consumer diets will aid the transition and the industry will need to ensure this is correctly marketed and suitable foods are offered to consumers which will aid the transition.

Barriers and Opportunities

The main perceived barrier to the industry to transform to SLM and other carbon neutral farming practices is that there is still uncertainty on the content and direction Welsh Government will agree to within the Food Wales Bill. Cluster feedback is, although the sector understands that changes to food production and land management are imminent, planning for the change cannot take place until industry knows the direction it has to take and the agreed processes it must follow. Therefore currently it is difficult to identify the training and skills needs that will be required for achieving sustainable food production.

New knowledge and skills will be needed for this transition from red diesel for farming equipment specifically in terms of replacement machinery and maintenance, furthermore with a switch over to more horticultural practices, new machinery will be required requiring capital expenditure and training.

Training

There have been huge concerns raised over the current apprenticeship models, with many courses being removed, such as all Level 3&4 being currently removed, coupled with Seafood being halted pending a new improved programme and no pathways in place for brewing.

The region has seen a reduction in the number of employed Horticulturists and there does not seem to be a work based training pathway for this skill. With the region wanting to have more sustainable locally produced food sources, horticulture (particularly fruit and vegetables) is a priority training pathway that’s required.

Support will be required for farmers and food producers in the region, reskilling / upskilling options for environmental, carbon, emissions, SLM etc, are available but require better promotion.

This training will need to be easily available and accessible for already busy, time critical rural workers. In addition agricultural and horticultural farming courses currently taking place will need realignment with environmental standards and new technologies.

Recruitment - Work Ready

There were around 550 job postings in this sector between Jan 2021 and June 2022 of which 350 were unique. This means that most roles are being advertised up to 2 times in order to get filled.

Note: Within agriculture posting intensity does not tell the full picture. Looking at the average time a job is posted is more accurate and in some cases is up to 60 days. This suggests that only one job post is made but left available for long time periods.

The Median average wage included in a job posting is around £10.00 p/h

The most mentioned **Soft Skills** in job postings are:

- Customer Service
- Detail Oriented
- Communication
- Packaging and Labelling
- Leadership / Management
- Keen to learn
- Strong work ethic

Source: Emsi Burning Glass 2022:

With the RLSP skills survey reporting only **13% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings.

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Median Positing duration
Packing Operators	69 / 36	2 : 1	43 days
Pickers/Packers	87 / 33	3 : 1	19 days
Bakery Assistants	45 / 28	2 : 1	34 days
Grounds Maintenance Operatives	38 / 20	2 : 1	43 days
Farm Workers	22 / 18	1 : 1	60 days
Arborists	17 / 10	2 : 1	20 days
Herdsmen	11 / 10	1 : 1	55 days
Packers	19 / 10	2 : 1	21 days
Tree Surgeons	11 / 7	2 : 1	41 days
Pickers	20 / 7	3 : 1	13 days



Food and Land Management

Workforce

In 2021, 10,243 Employers in Region

Business Size Jobs rise / fall since 2018

- | | |
|---------------|--------------------------|
| • 87.2% Micro | • Pembrokeshire -326 |
| • 10.9% Small | • Swansea -137 |
| • 1.6% Med | • Carmarthen -949 |
| • 0.2% Large | • Neath Port Talbot -232 |

Employ 22,227 people, 6.9% less than in 2018, 68% are Males, 32% Female, 23% potentially due to retire in next 10 Years.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

Agriculture

- 120 Foundation Apprentices
- 95 Level 3

Food & Drink Manufacturing

- 145 Foundation Apprentices
- 40 Level 3

Source: <https://statswales.gov.wales>

35% experience barriers to training
43% employers have apprentices

Sector Skills

Increases 2018 - 2022

- 5% (244) Food Production and Production Management
- 18% (103) Fishing
- 6% (96) H&S, Inspectors and quality control

Decreases 2018 - 2022

- 7% (772) Farmers and Farm Workers
- 5% Purchasing Managers
- 1% (18) Food Production Engineers
- 28% (43) Horticultural
- 11% (104) Managers in Horticultural

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 68% have difficulty in recruiting specific roles
- 70% are planning to recruit within 12 months

Next 5-10 Years Skill Requirements

- Renewables
- Specialist / Smart Engineering
- IT / Coding/ Web
- HGV & Plant

Key Findings

Skills Survey 2022 - 47 Responders

Challenges

- Recruitment
Financial Challenges
Developing Staff / Training
Poor Transportation Links
Sector Perception
Financial
- Training and Developing Staff
13% stated new staff are work ready
Skills / Poor Attitudes, Lack of Experience, are being the main negative factors
- 60% reporting skills challenges.
Most prevalent areas:
Skilled Trade / Food Manufacturing
Process plant and machine operation
Professional roles,
Sales / Customer Service & Management
- Soft Skills Challenges
Leadership
Problem Solving
Agricultural / Horticultural knowledge
Communication
- 27% stated Staff Retention is an issue
Mobility links
Low Wages / Unsociable hours / competition

16% planning to recruit aligned to Net Zero

Actions

Skills needed now / most advertised job roles

- Packers / Pickers
- Technicians and food process engineers
- Butchery
- Seafood and fishery
- Managers
- Farm workers
- Bakery
- Arborists
- Drivers HGV

Equip workers with relevant soft skills prior to employment:

- Customer Service
- Detail Oriented
- Communication
- Packaging and Labelling
- Leadership / Management
- Strong work ethic

Promote local training and schemes that are already in place such as:

- Farming Connect – Carbon assessment calculators and advisors and soil scrutiny
- Food Skills Cymru
- Tasty Careers
- Food & Drink Careers Passport from the National Skills Academy for Food & Drink

Apprenticeships

- Level 3&4 not live
- Delay in seafood and fishery apprenticeships
- Brewing and beekeeping not covered
- Lack of Horticulture (Particularly Fruit and Vegetables)



Sector Landscape

The Digital sector in the region is having recruitment and talent issues, since 2018, 308 jobs in the region from this sector have been lost, (Emsi Burning Glass 2022) most likely to other sectors requiring digital skills, or as a result of brain drain, therefore there is a real concern that the specific digital sector is losing out to other sectors now embracing digital requirements..

The Digital 2030 framework policy¹ is aimed at addressing this demand and sets out a post 16 learning framework and the current school curriculum review plans to promote computer literacy at all stages of learning.

Barriers and Opportunities

Digital skills are becoming the heart of every sector with more demand from all industry types to utilise digital processes. This is a key priority particularly when looking at the skills gaps in other sectors, by having a strong digital culture, all sectors can potentially alleviate many current skill gaps by adapting Industry 4.0² (AI, disruptive technologies, machine learning, automation etc). However the impact this will have on specific digital companies (93% of which are Micro) is already being shown with the reduction of jobs in this sector.

With a firm government strategy for digital expansion and the Net Zero agenda³ which digital services will be at the heart of, an embracement of cooperation with other sectors such as Energy, Manufacturing, Retail, Construction etc could potentially reinvigorate the sector in the region. Couple this with digital being low consumption sector, not burdened as much as other sectors by rising fuel and energy costs and in its very nature environmentally friendly, could maximise on this to deliver cost effective solutions and services to other sectors. Within the South West Wales Regional Economic Delivery Plan⁴ there are many projects that will require digital integration spanning Energy, Construction and Manufacturing. Also with less people now visiting the high street, there are opportunities for digital services within local Retail and Leisure.

Training

Cluster feedback has not been all that supportive of the training provided to date, reports of HE and FE turning out basic skills only and new employees not being work ready. The difficulty here is that digital is an ever changing landscape and education providers can struggle to keep up. Clusters also report that the apprenticeship framework for the sector is not fit for purpose. A better link between digital sector and education providers needs to be formed so the providers can ensure that skill requirements are being implemented.

Cluster group members also report that there is no shortage of graduates to recruit, but they lack more advanced skills.

Summary

As the region (and Wales as a whole) has an appetite to move to a more digital economy, the correct educational attainment requirements must be in place with high levels of course uptake. All Welsh Government policy and local economic plans have Net Zero and Digital at the heart of them, therefore ecosystems of cooperation between sectors and education providers will benefit all sectors.

¹ [Digital 2030: strategic framework | GOV.WALES](#)
² [Delivering Economic Transformation for a Better Future of Work \(gov.wales\)](#)
³ [Net Zero Wales Carbon Budget 2 \(2021-2025\): Summary document \(gov.wales\)](#)
⁴ [South West Wales Regional Economic Delivery Plan - Swansea](#)

Recruitment - Work Ready

There were around 15,000 job postings for digital skills between Jan 2021 and June 2022, spanning all sectors, of which 6,300 were unique. This means that most roles are being advertised up to 2 times in order to get filled.

The Median average wage included in a job posting is around £15.00 p/h

The most mentioned **Soft Skills** in job postings are:

- Communications
- Management
- Customer Service
- Research
- Problem Solving
- Planning
- Innovation

Source: Emsi Burning Glass 2022:

With the RLSP skills survey reporting only **4% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings.

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Median Posting duration
.NET Developers	511 / 145	4 : 1	19 days
Software Developers	311 / 137	2 : 1	30 days
Software Engineers	164 / 96	2 : 1	20 days
IT Support Officers	349 / 61	6 : 1	37 days
Java Developers	135 / 59	2 : 1	30 days
C# .NET Developers	270 / 57	5 : 1	35 days
PHP Developers	87 / 52	2 : 1	17 days
IT Support Engineers	149 / 52	3 : 1	33 days
Directors of Cyber Security	124 / 49	3 : 1	13 days
Front End Developers	77 / 49	2 : 1	29 days

Source: Emsi Burning Glass 2022: Job Posting Analytics



Digital

Workforce

In 2021, 828 Digital industries in the region - however digital skills are in all sectors

Business Size Jobs rise / fall since 2018

- | | |
|---------------|------------------------|
| • 92.3% Micro | • Pembrokeshire +59 |
| • 6.4% Small | • Swansea -333 |
| • 1.1% Med | • Carmarthen -31 |
| • 0.1% Large | • Neath Port Talbot -2 |

The Digital sector employs 3,871 people, however within all sectors 8,200 people are employed. 45% below National Average.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 50 Foundation Apprentices
- 285 level 3
- 65 Level 4 or higher

Source: Stats Wales:

Note: Gower College reported having just over ¼ of course spaces still available.

54% experience barriers to training
Funds, Lack of local providers, Lack of appropriate training / qualifications, Time.

33% of surveyed employers have apprentices.

Sector Skills

Increases 2018 - 2022

- 12% IT Specialist Managers
- 16% Programmers & Software Developers
- 11% in Web Design
- 17% in Public Administration
- 18% in Graphic Designers

Decreases 2018 - 2022

- 5% IT Project and Programme Managers
- 6% Information Technology Directors

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 56% have difficulty in recruiting specific roles
- 51% are planning to recruit within 12 months



Next 5-10 Years Skill Requirements

- IT / Coding/ Web development
- Renewables
- ICT
- Project Management

Key Findings

Skills Survey 2022 - 27 Responders

Challenges

- Recruitment
Financial Challenges
Staff Development / Training
Perception
- Training and Developing Staff
4% stated new staff are work ready
Lack of Skills, Experience, Qualifications and Work Ethic being the main negative factors
- 50% reporting skills challenges.
Most prevalent areas:
Professional occupations
Skilled trade occupations
C# & .NET
- Soft Skills Challenges
Problem Solving
Communication skills
Advanced / specialist/ basic IT skills
Coding Web Development
Knowledge
- 14% stated Staff Retention is an issue
Note: Cluster group feedback is counter to this claiming retention is an issue, citing Brain Drain as the main retention issue

9% Planning to recruit aligned to Net Zero

Actions

Apprenticeships into the sector

- Framework revision
- Low uptake places still available

Mitigate Brain Drain and job losses from the sector

Ecosystem of cross sector cooperation, all sectors require digital skills, this poses a risk to talent for the digital sector

Future skills required

- 4.0 Technologies
- Digital Automation
- Internet of things
- Data problem solving
- Cyber Security, high level and to be included at some level in all developer / cloud applications.
- Analysis
- Evaluation
- Computer sciences
- IT / Programming
- Cloud computing
- Social Media
- Smart Manufacturing / Disruptive Technologies
- STEM

Training, lecturer availability

- Keeping up with developments
- Linking with industry to ensure course content is up to date

Skills needed now / most advertised roles

- .NET developers
- IT Support
- Software engineers
- Cyber Security
- Management



Sector Landscape

As a sector Financial and Professional service jobs in the region are on the decline (14% less than in 2018), with all regions having significantly less jobs than in 2018. This could be due to the high demand for these skills within other sectors. All sectors are reporting to the RLSP that they require professionals of all types at managerial levels and the region seems to have an under representation of experienced skilled leaders. A clue to this issue is found when looking at the population demographics, the region has 5,000 more residents than in on 2019, however we have seen a decrease of 7,300 45-54 year olds [Emsi burning Glass 2022](#). This age bracket are the experienced skilled workers who could potentially be taking these professional jobs. There is also a huge year on year decrease in the number of apprenticeships taking place within this sector

Opportunities

Within all recent Welsh and UK Government policy documents, a requirement for leaders, managers and financial experts are required. Without these vital role projects highlighted in SQW Economic Delivery Plan South West Wales, Net Zero Carbon Budget, Digital 2030, A Manufacturing future for Wales etc will all struggle to get underway without the correct level of financial and management skills available to plan and execute these proposals. The concern would be that currently these skills would be enticed away from small and micro businesses within the sector because of the low levels of new talent emerging. The sector feedback is that **78%** of surveyed employers stated they have **difficulty in recruiting certain roles** and **69%** stating they are **planning to recruit in the next 12 months**

- [digital-2030-a-strategic-framework-for-post-16-digital-learning-in-wales.pdf \(gov.wales\)](#)
- [A Manufacturing Future for Wales \(gov.wales\)](#)
- [Delivering Economic Transformation for a Better Future of Work \(gov.wales\)](#)
- [Net Zero Wales Carbon Budget 2 \(2021-2025\): Summary document \(gov.wales\)](#)
- [South West Wales Regional Economic Delivery Plan - Swansea](#)

Training

Apprenticeship leaning pathway numbers for management & professional and business & administration are on a fast decline as highlighted in figure 1 below. Within the RLSP skills survey only **39%** of employers **have apprentices**. There are various reasons provided for this, difficulty in recruiting candidates, as candidates are not deemed work ready, also training constraints at the workplace with many of these jobs now being remote working, (it is difficult to mentor an apprentice remotely) being the main reasons given. Remote working mentoring and work readiness must be addressed with solutions made available if this decline in attracting new talent is to be addressed. Learning for life pathways being one option in encouraging more experienced workers to upskill, this requires less mentoring and they are already work ready. This process can also ensure talent is retained within the region.

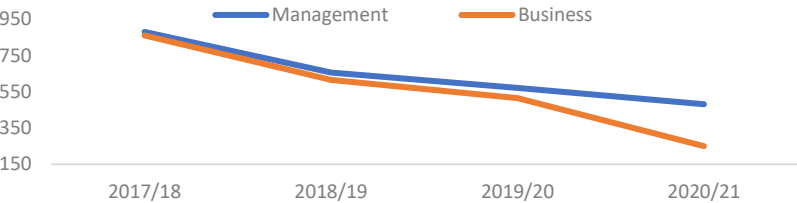


Figure 1:
655 less Apprenticeships
completions in this sector in
2021 vs 2018

Recruitment - Work Ready

There were around 21,000 job postings for Financial and Professional services between Jan 2021 and June 2022, spanning many sectors, of which 8,000 were unique. This means that most roles are being advertised up to 3 times in order to get filled.

The Median average wage included in a job posting is around £30,500 p/a

The most mentioned **Soft Skills** in job postings are:

- Communications
- Management
- Sales
- Customer Service
- Leadership
- Planning
- Welsh Language
- Detail Oriented

Source: [Emsi Burning Glass 2022:](#)

With the RLSP skills survey reporting only **17% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings with the addition of

- Computer Literacy and Enthusiasm

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Median Positing duration
Recruitment Consultants	359 / 127	3 : 1	34 days
Business Development Managers	181 / 107	2 : 1	35 days
Buyers	206 / 80	3 : 1	34 days
Trainee Recruitment Consultants	178 / 80	2 : 1	40 days
Human Resources Advisors	134 / 73	2 : 1	38 days
Store Supervisors	171 / 67	3 : 1	28 days
Human Resources Managers	109 / 63	2 : 1	39 days
Financial Controllers	102 / 62	2 : 1	39 days
Marketing Assistants	82 / 53	2 : 1	37 days
Registered Managers	143 / 51	3 : 1	37 days

Source: [Emsi Burning Glass 2022: Job Posting Analytics](#)



Financial & Professional

Workforce

In 2021, 2735 Businesses in Region

Business Size Jobs rise / fall since 2018

- | | |
|---------------|--------------------------|
| • 91.5% Micro | • Pembrokeshire -668 |
| • 7.6% Small | • Swansea -1630 |
| • 0.7% Med | • Carmarthen -645 |
| • 0.1% Large | • Neath Port Talbot -479 |

Employ 20,600 people, 14.2% Decrease since 2018, 53% are Males, 47% Female, 15.5% potentially due to retire in next 10 years.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

Management & Professional

- 10 Foundation
- 135 level 3
- 335 Level 4 or higher

Business & Admin

- 120 Foundation
- 115 level 3
- 150 Level 4 or higher

Source: <https://statswales.gov.wales>

39% of surveyed employers have apprentices.

33% experience barriers to training. Funds, Time and Lack of Provision are the main barriers.

Sector Skills

Increases 2018 - 2022

- 29% Property Housing and Estate Managers
- 12% Business and Related Associate Professionals n.e.c
- 4% Chartered and Certified Accountants
- 4% Business Sales Executives
- 6% Functional Managers and Directors n.e.c.
- 3% Financial Accounts Managers

Decreases 2018 - 2022

- 3% Financial Managers and Directors
- 8% Human Resource Managers and Directors
- 4% Marketing and Sales Directors
- 15% Solicitors
- 10% Finance and Investment Analysts and Advisers
- 9% Legal Associate Professionals
- 3% Actuaries, Economists and Statisticians

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 78% have difficulty in recruiting specific roles
- 69% are planning to recruit within 12 months

Next 5-10 Years Skill Requirements

- Renewables
- IT / Coding/ Web
- Specialist Engineering
- Smart Manufacturing
- Welsh Language

Key Findings

Skills Survey 2022 - 42 Responders

Challenges

- Recruitment
Staff Development / Training
Retention
Succession Planning
Bureaucracy
Financial
- Training and Developing Staff
17% stated new staff are work ready
Lack of Experience, Qualifications / Skills and Motivation are being the being the main negative factors
- 46% reported skills challenges.
Most prevalent areas:
Professional occupations
Administrative
Managers/ Directors
Associate professional and technical
- Soft Skills Challenges
Problem Solving
Leadership & Management
Communication / Relationship building
Knowledge
Skills in new Technology
Welsh Language
Digital & IT
Writing and Reading Instruction
- 35% stated Staff Retention is an issue
- 8% Planning to recruit aligned to Net Zero

Actions

All management financial and professional roles will be urgently required for the regional economic delivery plan

Decline in Apprenticeship uptakes

- Region has underrepresentation of professional skilled managers.

Skills needed now / most advertised job roles (All Sectors)

- Business Development Managers
- Buyers / Procurement
- Human Resources
- Finance and accountancy
- Legal
- Marketing
- Managers
- Financial analysts

Equip workers with relevant soft skills prior to employment The most mentioned Soft Skills in job postings are:

- Communications
- Management
- Sales
- Customer service
- Leadership & Planning
- Welsh language
- Detail oriented
- Computer literacy

Population a decrease of 7,300 45-54 year olds in the region. Must mitigate brain drain within this demographic to retain experienced workers

Future skills

- Scientific, Computing and STEM Management

Sector Landscape

The Education sector is undergoing constant change perhaps nevermore so than currently, from the previous pandemic years to the changing skills landscape of the coming years. However during this changing landscape, we are seeing a large decline in educator jobs since 2017, currently down 7.6% (around 1,500 less with Carmarthenshire being the most affected [Emsi Burning Glass 2022](#)) particularly in pre-16 educators. Since 2017 ITE qualifiers in the region have been in sharp decline, however in 2021 there was a rise back to pre 2017 levels. Post 16 has seen job increases but only small gains and feedback from the provider cluster group and other industry sectors, is that recruitment for specific skill post 16 educators is challenging. This is of concern given the new landscape of change which is in the pipeline for the region. Pre 16 educators have a new national curriculum, Welsh language / bi-lingual and digital skills to incorporate. Post 16 educators have a wealth of new Net Zero skills to train along with an ever advancing, changing digital and smart engineering technologies to keep up with. Also a further enhancement of blended learning processes which were effectively utilised during the pandemic will be crucial due to the rurality of the region and mobility factors.

The changing landscape of skills

Within the Digital 2030¹ policy, and the Manufacturing future for Wales framework², Welsh Government have addressed a need to ensure all learners have a good level of digital and industry 4.0 skills and see a vision of Wales developing a strong digital economy. Digital skills are fast becoming the heart of every sector with more demand from all industry types to utilise digital processes. Digital is also fast becoming a cross over discipline, AI, disruptive technologies, 3D printing, machine learning, automation etc. are all digital skill requirements as well as coding, web development and IT. Therefore providers must ensure they can keep up with these evolving skill demands. Within the South West Wales Regional Economic Delivery Plan there are huge infrastructure projects planned that will require new skills in all sectors, but specifically the region will need an entire new skilled workforce for the energy and carbon storage sector to achieve the plan delivery. Within the Net Zero Carbon Budget policy, all sectors will need to have embedded “green skills” within their workforces and a huge knowledge upskill process will have to take place to ensure all Welsh citizens understand the concept of Net Zero and their role within it..

Training

Given the rurality of the region and with many infrastructure projects taking place in rural locations such as off shore wind, solar farming etc. and with over 97% of the regions industry having less than 49 employees, where staff struggle to have time away to conduct wider learning and upskilling, a blended learning offering would be hugely beneficial. Delivering Economic transformation for a better future review 1 highlighted the need to adapt skills to the changes envisaged in Industry 4.0. Welsh Government skills policy is aiming to blend delivery between higher and further education and work-based learning i.e. “post compulsory education”. The aim is to create ease of movement between vocational, technical and academic pathways. Regulated qualifications may not always be the best option for employers or the workforce.

1 [digital-2030-a-strategic-framework-for-post-16-digital-learning-in-wales.pdf \(gov.wales\)](#)
2 [A Manufacturing Future for Wales \(gov.wales\)](#)
3 [Delivering Economic Transformation for a Better Future of Work \(gov.wales\)](#)

Recruitment - Work Ready

There were around 25,000 job postings for Education between Jan 2021 and June 2022, spanning all education levels, of which 12,000 were unique. This means that most roles are being advertised up to 2 times in order to get filled.

The Median average wage included in a job posting is around £31,000 p/a

The most mentioned **Soft Skills** in job postings are:











- Communications
- Management
- Mathematics
- Enthusiasm
- Welsh Language
- Research and Planning
- Literacy
- Innovation

Source: [Emsi Burning Glass 2022](#):

With the RLSP skills survey reporting only **19% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters closely mimic the soft skill requirements frequently posted in job listings with the addition of

- Computer Literacy and Skills in new Technology

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Median Posting duration
Teaching Assistants	3,401 / 1,467	2 : 1 	30 days
Cover Supervisors	868 / 438	2 : 1 	32 days
Learning Support Assistants	712 / 392	2 : 1 	33 days
Primary Teachers	832 / 356	2 : 1 	38 days
Secondary Teachers	527 / 240	2 : 1 	33 days
Lecturers	541 / 238	2 : 1 	28 days
SEN Teaching Assistants	451 / 235	2 : 1 	28 days
Mathematics Teachers	440 / 218	2 : 1 	35 days
Key Stage 2 Teachers	398 / 185	2 : 1 	37 days
English Teachers	445 / 181	2 : 1 	31 days

Source: [Emsi Burning Glass 2022: Job Posting Analytics](#)



Education Providers

Workforce

In 2021, 783 Primary, Infant, Junior, Middle and Secondary Schools Institutions

Jobs rise / fall since 2018

4 Colleges	• Pembrokeshire +153
2 Universities	• Swansea -211
Open University	• Carmarthen -277
	• Neath Port Talbot -112

Employ 18,400 people, 2.4% Decrease since 2018, 28% are Males, 72% Female, 17% potentially due to retire in next 10 years.

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2020/21

- 120 Foundation Apprentices
- 115 level 3
- 150 Level 4 or higher

Source: Stats Wales:

65% of surveyed employers have apprentices.

34% experience barriers to training. Funds, Time and Lack of Provision are the main barriers.



Sector Skills

Increases 2018 - 2022

- 14% Higher Education Teaching Professionals
- 2% Vocational and Industrial Trainers and Instructors
- 1% Further Education Teaching Professionals

Decreases 2018 - 2022

- 5% Primary and Nursery Education Teaching
- 5% Teaching Assistants
- 8% Secondary Education Teaching Professionals
- 5% Teaching and Other Educational Professionals n.e.c.
- 1% Senior Professionals of Educational Establishments
- 4% Special Needs Education Teaching Professionals
- 6% Careers Advisers

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 70% have difficulty in recruiting specific roles
- 66% are planning to recruit within 12 months

Key Findings

Skills Survey 2022 - 27 Responders

Challenges

- Recruitment
 - Financial Challenges
 - Staff Development / Training
 - Retention
 - Sector Perception
 - Bureaucracy
- Training and Developing Staff
 - 19% stated new staff are work ready
 - Lack of Experience, Qualifications / Skills and Motivation are the negative factors
- 57% reported skills challenges.
 - Most prevalent areas:
 - Skilled trade occupations
 - Professional occupations
 - Administrative
 - Associate professional and technical
- Soft Skills Challenges
 - Leadership & Management
 - Communication
 - Oral Welsh language
 - Problem Solving
 - Computer Literacy
 - Skills in new Technology
- 31% stated Staff Retention is an issue
- 21% Planning to recruit aligned to Net Zero

Actions

New Skill requirements

- Welsh Language
- Specialist Engineering / Smart Manufacturing
- Net Zero – Recruitment:
 - Renewables
 - Energy / Solar, Hydro, Wind, Battery
 - Circular Economics
 - Retrofit
 - Trust Mark
- Digital – Recruitment of digital trainers is an issue
 - .NET & C#
 - Coding / Computer science
- Construction
 - Timber Frame homes
 - Groundworks

Offer more blended learning where appropriate

Part of ecosystem of cooperation with Industry Sectors, to stay abreast with latest's systems / processes

Fit for work programmes

- Computer Literacy
- Problem Solving
- Communication
- Leadership / Management

Skills needed now / most advertised roles

- Teaching Assistants
- Primary and Secondary Teachers
- Lecturers
- Mathematics

Sector Landscape

The Public Sector is the largest employer in the region with multi faceted operations taking place within it. This sector plays a vital role for delivery and implementation of government policy. The key overarching initiatives at the moment for Public Sector are Health and Social Care, Net Zero, Education, Future Generations, Digital, Welsh Language, Regional Economic Delivery Plan and Employability & Skills. These policies have overlap and are inherently intertwined within each other. The big policy announcements with targets in place for change and implementation in these areas, alongside the pandemic recovery and the high level of inflation, the Public Sector faces some interesting challenges over the next few years.

Barriers and Opportunities

To achieve Net Zero by 2030 in the public sector, skills need to be addressed, survey responders stated that **renewable skills will be the most required job skill in the coming years**, yet many employers in the sector are still unsure of what specific skills in this subject area would be needed. The Net Zero target was launched in 2021 yet **green skill mentions in job postings over the past 2 years are absent**. Support and clear direction is required in all departments for active change to take place and to ensure the ambitious target of Net Zero by 2030 is achieved. Tying in Employability & Skills, Education, Digital and Future Generations policy to Net Zero is vital.

The current situation also needs urgent attention. With an ageing population in the region, evidence of talent brain drain to higher paid roles in England, the region is struggling to ensure it can not only retain its current workforce, but will struggle to fill emerging gaps to fulfil the various policy requirements.

Digital skills seem to be effected the most by Brain Drain culture, digital can potentially be the biggest influencer for Public Sector that can help deliver on Net Zero, but survey responders list **digital skills as a barrier to work readiness**.

It is clear from the survey feedback and job posting analysis that elderly and disability care roles are in high demand with less people being enthused to do this type of work, most likely a Pandemic hangover, this skills shortage is further fuelling the current crisis in social and health care.

Training

Public Sector & Healthcare, have the highest intake of apprenticeships, **84%** of Public Sector employers surveyed **employ apprentices** taking full advantage of the in work learning pathways, but **45%** did state they experience **barriers to training** with time and course visibility being the main drivers to this. The sector is concerned about the quality of external training , citing many cases of having to untrain then retrain graduates and students. In many cases cluster feedback is that management and professional training has been taken on internally because of the lack of quality training provision.

Summary

With the ageing population and Public Sector being the biggest employer in the region, there are some key challenges ahead in all industry types within the sector. There is a requirement immediately to fill the gaps in the care and support systems and for the future, skills are required to deliver on all the various targets set by policy.

Recruitment - Work Ready

There were around 115,178 job postings in this sector between Jan 2021 and June 2022 of which 39,749 were unique. This means that most roles are being advertised up to 3 times in order to get filled.

The Median average wage included in a job posting has increased 4.8% between August 2021 (£11.48p/h) to July 2022 (£12.03p/h)

The most mentioned **Soft Skills** in job postings are:

- Communication
- Leadership / Management
- Customer Service
- Welsh Language
- Teaching
- Problem Solving / Planning
- Enthusiasm / Detail Oriented

Source: Emsi Burning Glass 2022:

With the RLSP skills survey reporting only **21% of employers** in this sector deem **new employees as work ready**, the feedback from the survey and the clusters group closely mimic the soft skill requirements frequently posted in job listings. In addition to the above, RLSP have received feedback on:

- Computer Literacy all levels basic to advanced

Most mentioned skills in Job Postings

Job Title	Total/Unique	Posting Intensity	Median Positing duration	
Support Workers	8,972 / 3,012	3 : 1	36 days	Care Workers are deemed as a hard to fill role with a posting ratio of 10 -1
Care Assistants	2,523 / 891	3 : 1	36 days	
Teaching Assistants	1,592 / 710	2 : 1	31 days	
Residential Support Workers	1,195 / 382	3 : 1	33 days	Other hard to fill positions include: <ul style="list-style-type: none">• Occupational Therapists• Disability Support Workers
Personal Assistants	1,615 / 379	4 : 1	35 days	
Labourers	812 / 369	2 : 1	35 days	
Health Care Assistants	795 / 308	3 : 1	32 days	
Administrators	492 / 288	2 : 1	37 days	
Home Care Assistants	1,870 / 257	7 : 1	31 days	
Receptionists	606 / 251	2 : 1	32 days	



Public Sector

Workforce

In 2021, 371 Institutions

Employ 25,588 people,
15.5% Increase since 2018.

Jobs rise / fall since 2018

- Pembrokeshire +34
- Swansea +1,588
- Carmarthen +79
- Neath Port Talbot +2,177

Employ 25,588 people, 15.5% Increase since 2018, 48% are Males, 52% Female, 21% potentially due to retire in next 10 years

Source: Emsi Burning Glass 2022

Education

Apprenticeships in 2021/22

- 2,045 Foundation Apprentices
- 1,880 level 3
- 940 Level 4 or higher

84% of surveyed employers have apprentices.

45% experience barriers to training
Time and visibility of training offers are the main barriers.



Sector Skills

Increases 2018 - 2022

- 9% increase in Public Order & Safety Activities
- 6% Justice and Judicial Activities
- 12% Defence Activities
- 7% in Public Administration

Decreases 2018 - 2022

- 23% Social Security
- 3% Fire Service

Source: Emsi Burning Glass 2022

Skills Survey 2022

- 80% have difficulty in recruiting specific roles
- 96% are planning to recruit within 12 months

Key Findings

Skills Survey 2022 - 28 Responders

Challenges

- Recruitment
Retention
Sector Perception
Financial Challenges
Staff Development / Training
Transport links (Mobility)
- Training and Developing Staff
21% stated new staff are work ready
Lack of Experience, Qualifications / Skills are the negative factors
- 68% reported skills challenges.
Most prevalent areas:
Professional occupations
Caring, Leisure and other service occupations
Associate professional and technical
Skilled trade occupations
- Soft Skills Challenges
Advanced / specialist/ basic IT skills
Oral Welsh language
Leadership & Management
Communication skills
Problem Solving
Knowledge
- 50% stated Staff Retention is an issue
Low wages / Competition
Location (Mobility)
Lack of interest in the work

Actions

Net Zero Carbon Budget

- Better visibility of sector requirements

Digital needs, retention of digital skills

Sector cannot compete with the private sector on salary

- IT / Programming / Cyber Security / Social Media

Equip workers with relevant soft skills prior to employment The most mentioned Soft Skills in job postings are:

- Communication
- Leadership / Management
- Customer Service
- Welsh Language
- Problem Solving / Planning
- Enthusiasm / Detail Oriented
- Computer Literacy

Skills needed now / Most advertised job roles

- Carers
- Social workers
- Professional occupations, workforce planners, analysts, etc.
- Tradespeople and Labourers
- Occupational therapists
- Disability support
- Mental Health
- Planning and architecture
- Catering (schools)
- Cleaners

Key Learning Pathways - Management

These pathways are mainly completed internally, sector need access to good quality providers offering this type of progression/upskill training, current options are limited.



Summary of actions

Current skills gaps *Fair Work for all*

Focus on all Sectors to address skill gaps that they experience now, better visibility for employers and employees of:

- Upskill pathways
- Reskill pathways
- Improve visibility and widen scope of apprenticeships
- Encourage learning for life
- Improve sector perceptions
- Remove barriers and create ease of access – Bureaucracy, litigation, mobility etc
- Promote increased blended learning / eLearning
- Develop confidence

Create Ecosystems of support *Stronger Fairer Greener Wales*

Many Micro and Small employers do not have the opportunity to plan ahead. There is a changing skills landscape ahead in the region and ensuring all employers take full advantage of and can plan for the changes ahead are vital. Encouraging cross sector collaboration coupled with visibility of initiatives, skills programmes, learning support and opportunities would enable the small and micro employers in the region to forward plan and have a support network to share best practice with.

Engage Industry with Education *Learning for Life / Young Persons Guarantee*

- Pre 16. This is an ongoing concern that pre 16 educators are unaware of the skills available within the local area. Better connections between industry and pre- 16 education are needed to break down traditional stereotypes and to encourage emerging talent to work locally.
- Post 16. Better links with local industry can really help post 16 education to ensure that the course content remains relevant and up to date. Engagement with on site mentors from industry could be a vital link to ensuring that course content remains current.

Work Readiness *Learning for Life*

Just 16.5% of survey responders stated new employees were work ready, most stating that motivation and attitude being the biggest concern. A better approach to post 16 work experience is required coupled with work ready preparation training within education.

Net Zero *Net Zero Wales*

All employees and employers in Wales require upskilling in basic net zero practices, preferably some form of compulsory basic induction training similar to current H&S training. In addition, all education programmes should be underpinned with green knowledge in line with current thinking and sustainable methods. A huge nationwide education / training programme is required for Net Zero to gain traction.

Look to the future *Future Generations / Net Zero Wales / Digital 2030*

All sectors face skill framework changes in the next few years, be that from Net Zero, Digital 4.0, Energy or the national curriculum changes. Plans need to be in place now with clear pathways into the new and emerging skills that will be required in the coming years.

Brain Drain *Fair Work for all*

An ongoing concern. 40% of Welsh HE students on 2020 /21 now work in England. Employers and Welsh Government must promote Fair Work for Wales policies within Industry and the workforce to encourage the benefits of working in Wales.

Economic Inactive / Unemployed

Tackling economic inequality / Healthy Work, Healthy Wales

Levels of economic inactive have dropped, however unemployment has gone up, this is a prime demographic target group to upskill and reskill to help fill the skills shortage. Strong clear pathways for NEET, Veterans, ex offenders, Refugees, people recovering long term health conditions, older generation etc to upskill and re-enter the workforce are required as a matter of urgency.

Decline in teacher numbers

This needs to be addressed, Since 2017 ITE qualifiers in the region have been in sharp decline and very few are completing the qualification in the medium of Welsh.

Welsh Language *Cymraeg 2050*

Welsh Language needs to be encouraged further especially in education. The RLSP has heard many good case studies of FE and HE providers bolting on Welsh language syllabuses to courses so the student become a bi-lingual learner, thus improving future job opportunities. However the education sector have reported the loss of teachers to other regions where Welsh language is not a fixed requirement.

Management and Leaders *Learning for life*

There is an over representation of low skill low wage jobs in the region. The demographics data tells us there is a decrease in experienced 45 to 54 year olds. All sectors report recruitment difficulty in finding experienced leaders and managers.

Energy *Stronger Fairer Greener Wales*

Is now a growing sector in the region and will require all the skills associated without taking skilled roles from other sectors who are already struggling to recruit.



Action Plan

Actions	Actions	Target Cohort	Enablers	Success Measure	Timeline
<p>Current Skill Gaps:</p> <p>Support employers to develop / retain / reskill and upskill their employees, encouraging leaning for life.</p>	<p>Focussing on priority sectors, develop clear progression routes for succession planning and allowing opportunity for upskill and reskilling, via promotion of:</p> <ul style="list-style-type: none"> • Apprenticeships • PLA's • Work Based Learning • Short courses • Blended learning / eLearning • Management pathways <p>Help employers especially small and micro to maximise non pay benefits such as work life balance, flexible working, inclusive practices etc, which has been proven to aid with recruitment and retention</p>	<p>Employees</p> <p>Employers</p>	<p>Employers</p> <p>Employees</p> <p>WBL providers</p> <p>FE / HE / Providers</p> <p>RLSP</p>	<p>Increases in uptake and completion rates of</p> <ul style="list-style-type: none"> • Apprenticeships • PLA's • Work Based Learning • Short courses • Blended learning / eLearning • Management pathways 	<p>Ongoing Measure</p> <p>success rates measured every year:</p> <p>Oct 2023</p> <p>Oct 2024</p> <p>Oct 2025</p>
<p>Work Readiness</p> <p>To ensure employees are deemed work ready</p>	<ul style="list-style-type: none"> • Promote taster placement programmes • Ensure work readiness and confidence building is part of educational process • Explore what core skills employers require for an employee to be work ready. 	<p>Job Seekers</p> <p>Work Experience</p>	<p>Employers</p> <p>Employees</p> <p>WBL providers</p> <p>FE / HE</p> <p>Careers Wales</p>	<p>Increase in employers stating new staff are work ready. Measured in future skills surveys</p>	<p>Measurement to take place in:</p> <p>July 2025</p>
<p>Talent access, support employers access to talent</p>	<ul style="list-style-type: none"> • Explore potential for shared WBL / apprenticeship programmes • Encourage a robust work experience programme • Create opportunities for employers to and employees to match talent to jobs (events / brokerage) • Focus on skills / sectors that LMI deem priority • Promote and encourage YPG and other employability programmes • Promote the extension of degree apprenticeships particularly within priority sectors 	<p>Employees</p> <p>Employers</p>	<p>Providers</p> <p>Employers</p> <p>RLSP</p> <p>Careers Wales</p>	<p>Completion of Work Experience / placement programme</p> <p>Increases in employers taking advantage of YPG</p> <p>Increases of Degree apprenticeships</p>	<p>Ongoing measure</p> <p>Final measurement to take place in:</p> <p>July 2025</p>



Action Plan

Actions	Actions	Target Cohort	Enablers	Success Measure	Timeline
Ecosystems of support: Net Zero Transitioning	Ensure all employers in the region are aware of opportunities and responsibilities for the delivery of Net Zero. Ensure industry has a clear path and understanding of their support network <ul style="list-style-type: none">• Cross sector collaboration via events and cluster meetings• Promote availability of upskill and reskill pathways• Encourage and promote Net Zero adoption• Collaborate and share best practice across all sectors	Employees Employers	Employers RLSP Providers Welsh Government	Cooperation and support groups established and in operation	Review each year Oct 2023 Oct 2024 Oct 2025
Develop skills for current and future local employers requirements, engaging learners with industry and showcasing the exciting opportunities.	Develop awareness with young people of the exciting and possible career pathways open locally. <ul style="list-style-type: none">• Sector perception improvement• Employers working with education to showcase local opportunities• Employers working with education using LMI to identify skill requirements	14-19	Careers Wales Schools Local Authorities Employers FE	LMI skills gap analysis	Oct 2025
Place a clear focus on emerging Industry 4.0 Technologies, Cyber & Digital, Sustainability	Using LMI focus on skills that have a high risk of automation with a view of encouraging and promoting employers to utilise automated systems to aid with the skills gaps. Raise awareness and actively promote new automated technologies within Industry, providers, employees and pre 16 education <ul style="list-style-type: none">• Organise events that showcase best practice• Share best practice• Clear focus on SME support• Promote local support networks such as MADE Cymru / Business Wales• Work to ensure that Apprenticeship Frameworks (including championing more Degree Apprenticeships) reflect the needs of the sector• Encourage wider visibility of courses relating to Disruptive Technologies / Industry 4.0 technologies to the sector.	Employers Employees Pre & post 16	Careers Wales MADE Cymru Business Wales RLSP Employers Providers	Increases in 4.0 Technologies educational attainment uptake Increases in Employers adopting automation processes	Ongoing to be measured every year Oct 2025



Action Plan

Actions	Actions	Target Cohort	Enablers	Success Measure	Timeline
Energy Sector Considered a new emerging sector in the region	<p>The Energy sector has the potential to add thousands of jobs by 2030 to the region.</p> <ul style="list-style-type: none"> Encourage / promote educational attainment within this sector Work with the sector and providers to identify skill challenges and educational gaps Promote Apprenticeship pathways for green energy sector 	Providers Employers Pre & post 16	Careers Wales RLSP Employers Providers	Training pathways for renewable Energy sector. Apprenticeship programmes	Oct 2025
Welsh Language	<p>Continue to promote WL within all sectors, demonstrating the positives from bi lingual culture.</p> <ul style="list-style-type: none"> The RLSP have been and will continue to be proactive in raising awareness by hosting workshops with Industry clusters to highlight barriers and share best practice. Another workshop is planned in partnership with Coleg Cymraeg in November 2022 with reporting and actions based around challenges and future actions the RLSP will implement. Work with priority sectors (Health & Social Care, Public Sector, Retail, Leisure & Hospitality) to identify issues promote current best practice and create Welsh Language recruitment strategy. 	Employers Employees	RLSP Employers Coleg Cymraeg	Increase in WL use within the RLSP	Oct 2025
Future skill requirements Delivering the future	<p>Working with Education, Industry and local authority to identify what new and emerging skills will be required. LMI gap analysis to focus on:</p> <ul style="list-style-type: none"> Collaboration with Providers to ensure relevant training pathways are open and ready Upskill / Reskill Digital / Cyber <ul style="list-style-type: none"> Net Zero Energy / Specialist knowledge Sustainable Land Management 	Providers Employers Pre & post 16	Careers Wales MADE Cymru RLSP Employers Providers	<p>Have course content and courses available for upskill and reskill processes in line with WG policy on.</p> <ul style="list-style-type: none"> Digital / Cyber Net Zero Energy / Specialist knowledge Sustainable Land Management 	Oct 2025



Action Plan

Actions	Actions	Target Cohort	Enablers	Success Measure	Timeline
Maximise the impact of the Young Persons Guarantee	<p>Improve visibility and promote the YPG within the region</p> <ul style="list-style-type: none"> • Encourage entrepreneurship culture • Raise awareness of business set up within the region • Raise awareness to under 25's of career pathways which are industry priorities • Raise awareness of educational courses that require greater participation 	Employees Employers Post 16	RLSP Careers Wales Industry Clusters	<p>Full awareness of the YPG within the regional employers</p> <ul style="list-style-type: none"> • Increased numbers of YPG uptake • Decrease in NEET numbers for under 25's in the region • Decrease in Economic inactive within the under 25's • Decrease in Unemployment within under 25's 	Oct 2025
Continued reviews of all sectors as new technology, policy and initiatives emerge	<p>Stay abreast of new emerging topics that can have benefits to and effects on local employers.</p> <p>Ensuring timely, accurate and useful information is shared and promoted.</p> <ul style="list-style-type: none"> • Policy updates • News / Best practice sharing • WG initiatives • New technologies • New ways of working 	Employers Employees	RLSP TBC based on initiative	<p>TBC, based on new things that arise.</p> <ul style="list-style-type: none"> • Targeted regular newsletters / communication strategy • Level of uptake per initiative • Engagement with employers 	Oct 2025

Cluster Group Contributors

Detailed are all the companies that have contributed withing cluster groups.



Advanced Materials & Manufacturing

C&P Engineering Services Ltd
Morgan Marine
Qualitek Engineering
Red Dragon Flagmakers
Ritetrak Engineering
TWI
Shufflebottom Ltd
SMaRT Ltd
TATA Steel UK
Teddington
The Magstim Company Limited



Digital

BBC
iCreate Ltd
Web Adept - Online to Success
Acanthus Holden
Hays
Mrs Bucket Cleaning
Admiral
Yr egin
RJ Chartered Surveyors
Swansea Building Society
Cloud Genius Ltd
Tinopolis Interactive
ITEC Digital Training
Morgan + Morgan
DCW group



Construction

Alun Griffiths
Andrew Scott Limited
bluestone builders ltd
Cyfle Building Skills Ltd
Gower Gas & Oil Heating Services (Ltd)
Jones Brothers (Henllan) Ltd
Kier
Ledwood Mechanical Engineering Ltd
Leftfield Environmental Ltd
Morgan Sindall
Morganstone Ltd
Shufflebottom Ltd
T Richard Jones (Betws)Ltd
TAD Builders Ltd
Thomson Scaffolding Limited
celium recruitment
dcwgroup
jbhl
centregreat
cpengineering
gdharries



Leisure, Tourism & Retail

Bluestone Lesiure
Celtic Holiday Parks
Clydey Cottages
CWRW Ltd
Folly Farm
Glangwili Mansion
Grove of Narberth
Haven Kiln Park
melin tregwynt
Oakwood Themepark
Penycoed Farms Leisure Ltd
Retreats Group
Tea Traders Ltd
West Wales Holiday Cottages
LBS Builders Merchants Ltd
rgtractors.com
Sians Emporium Ltd
Tesco
The National Botanic Garden of Wales



Health & Social Care

Cadog Homecare
Carmarthenshire county council
Cartrefi Cymru
Cathedral Care Ltd
Catrefi Cymru
city and county healthcare group
Crosshands Home Services Ltd
Fieldbay
Foel Farm
Glanmorfa Care Home
Glasallt Fawr
Habitat Homecare
Hafan Cymru
Haven Homecare
Home Instead Swansea
care without compromise
ND Care and Support
Pembrokeshire County Council
RSD Social Care Ltd
Rural Health and Care Wales
Swansea Bay Home Care Services
Swansea Bay University Health Board
West Wales Care Partnership



Public Sector

Carmarthenshire County Council
Ceredigion County Council
cetma
DVLA
DWP
Dyfed Powys Police
Hywel Dda University Health Board
Neath Port Talbot Council
NPTC Training and Development
Pembrokeshire college
Pembrokeshire County Council
Pembrokeshire County Council (Futureworks)
South Wales police
Swansea Bay City Deal
Swansea Council - Health
Swansea Council - Education
Business in Focus
Careers Wales



Energy & Environment

Bombora Wave Power Europe Ltd
Dragon LNG
ECITB
Energywise-Wales
Industry Wales
Port of Milford Haven
Simon Safety & Lifting Centre Ltd
South Hook LNG
Swalek High Voltage Services Ltd



Food and Land Management

Farmers' Union of Wales
Burns Pet
Capestone Organic Poultry Limited
Castell Howell Foods Ltd
CDT Sidoli
Celtica Foods Ltd
Dunbia
Dwr Cymru Welsh Water
Gower brewery co ltd
Gower view foods
NSAFD
Princess Gate Water
Rachels Organic Dairy
Tan Y Castell Foods Ltd
Tregroes Waffle Bakery Ltd
United Pet Food
DEREK HARRIS TREE SERVICES LTD



Education Providers

Cambrian Training Company
Coleg Cymraeg Cenedlaethol
Coleg Sirgar
Gower College Swansea
ION Leadership
Lantra
Pembrokeshire County Council
Swansea University
UWTSD
Neath and Port Talbot College
Swansea University

Survey Responders

C&P Engineering Services Ltd	G D Harries & Sons Ltd	Web Adept - Online to Success	Farmers' Union of Wales	Capestone Organic Poultry Limited
Cross Engineering Swansea Ltd	G P construction	2B Enterprising Ltd	Glanrhyd Farm	Car-Y-Mor/ Solva Seafoods
Cware Pantgwyn Quarry LTD	Gower Gas & Oil Heating Services (Ltd)	Alpha Safety	Llanerch Farm	Castell Howell Foods Ltd
Dart recruitment T/A Sunny	Haven Electrical Services	Cambrian Training Company	MKJ LIMITED	CDT Sidoli
J M Fabweld	Helix 21 Ltd	Castle School	Pentwyn Farm	Celtica Foods Ltd
Liquitherm technologies group	Hesatshine Ltd	Coleg Cymraeg Cenedlaethol	Acanthus Holden	Coco Bean
Make the change consultancy	Hill Insulation	ColegSirgar	Admiral Insurance	Crazy Baker
Morgan Marine	Huw Thomas	Cylch Meithrin Crymych	Agri Advisor Legal LLP	Dairy partners
Power Steering Solutions	John morley electrical	goody 4 paws ltd	Allchurch & Co Limited	Dunbia
Qualitek Engineering	Jones Brothers (Henllan) ltd	Gower College Swansea	Andrews cleaning services	Dwr Cymru Welsh Water
Radical Controls Ltd	JS Pickering electrical	Gower Digital	Birt & Co	Evan-Evans Group Ltd
Red Dragon Flagmakers	K phillips windows ltd	Holutions Ltd	Cennen Solutions Ltd	Good Carma Foods
Rhino Systems Ltd	Kier	holy Name school	Clive rees Associates	gower brewery co ltd
RIB-Koti Ltd	Ledwood Mechanical Engineering Ltd	ION Leadership	CSA Service Group	gower view foods
Ritetrak Engineering	Leftfield Environmental Ltd	Lantra	Davies Craddock (Llanelli, SA15 1UH)	Hancox's pies
Rollacad	Liam Davies Plumbing and Heating	Lullaby's Day Nursery	Eaton-Evans & Morris	Lost Coins Marstons
SMArT Ltd	Llangain Designs	Meithrinfa Do Re Mi Nursery	Financial Solutions Wales Ltd	Maddocks cakes From Wales Ltd
South Wales Industrial Valves Services Ltd	Morgan Sindall	NPTC Group of Colleges	H3 Group Ltd	NSAFD
TATA Steel UK	Morganstone Ltd	Pembrokeshire County Council	Haverfordwest Estates Ltd	Princess Gate Water
Techno Engineering T/A Jenkins & Davies Engineering	NPTC Group	Playdays Childcare	Hays	Rachels Organic Dairy
Teddington	Phase 3 Electrical Ltd	PRP Training Ltd	Hoop Recruitment	Runwayskiln Ltd
Thomfield Engineering	Plumbing and heating ltd	S C Cymru Cyf / C S Wales Ltd	Hutchinson Thomas	Seafish
THTF Global UK. Co. Limited	Premier Forecourts and Construction	St Padarn's RC Primary School	J D Jones and Co	Smallholding Secrets
Tinmasters Ltd	R.K.E.S.	Swansea University	JCP Solicitors	SO Coffee
1 Call Electrical & Handyman Services	Rees Electrical	UWTSD	Landsker Business Solutions Ltd	Tan Y Castell Foods Ltd
Aermech Ltd	Shufflebottom Ltd	Ysgol Bae Baglan	Landsker Ecology	Tregroes Waffle Bakery Ltd
Alun Griffiths	steel fab wales ltd	Ysgol Eglwyswrw	Lewis Lewis & Co Ltd	United Pet Food
Andrew Scott Limited	T Richard Jones (Betws)Ltd	Ability Power Limited	Libra Energy & Estates Ltd	DEREK HARRIS TREE SERVICES LTD
Austwel Ltd	TAD Builders Ltd	Blue Gem Wind	Llewelyn Davies	Roscoe Tree Services Ltd
bluestone builders ltd	Talsin ltd	Bombora Wave Power Europe Ltd	Maxx Securities Ltd	accomplish
building & land services ltd	The tradie life	BROWNS WASTE MANAGEMENT & RECYCLING	Mrs Bucket Cleaning	Adferiad Recovery
C.A.D. Services	Thomson Scaffolding Limited	LIMITED	Optimal Facilities Ltd	Age Cymru West Glamorgan
Carmarthenshire Council Housing	Wainwrights Electrical	CR Plus Ltd	Pelatis Online Ltd	Alzheimers Society
A D J Construction	WB Griffiths & Son Ltd	CWM Evnvironmental	Pendragon accounting services	Barchester
Castle scaffolding	Whitecross & Son Ltd	DP Energy	Perago Wales Ltd	British Red Cross
CB3 Consult Ltd	Willmott Dixon	Dragon LNG	Peter Lynn & Partners	C&D Family Care
Celium Recruitment Ltd	Ynni Cymru Energy Solutions Ltd	ECITB	PMP Recruitment & Challenge-trg	Cadog Homecare
Centregreat Ltd	A H hair and Nails	Energywise-Wales	Pure Health & Safety Ltd	Caredig
Classic PVC Home Improvements Ltd	Crunch Digital Media	Habitat Matters Ltd	Quadra Marine Services LTD	Carmarthenshire county council
Coastal Housing	Forget Me Not Florist	Industry Wales	Really Pro Ltd	Cartrefi Cymru
Cyfle Building Skills Ltd	graphic realm	Jenkins & Davies Engineering	RJ Chartered Surveyors	Cathedral Care Ltd
D & K Carpentry	HAEARN - DESIGNER BLACKSMITHS LTD	Lighthouse electrical services direct ltd	Roberts Boyt Limited	Catreffi Cymru
DCW Group	Highly	Port of Milford Haven	safe hands security ltd	city and county healthcare group
Delme L James Ltd	iCreate Ltd	Simon Safety & Lifting Centre Ltd	Smart Bookkeeping Ltd	Community Interest Care
DME Engineers Ltd	Landsker Archaeology Ltd.	South Hook LNG	Sunny Recruitment	Consensus
Dyfed Electronics Ltd	MOBAD Solutions Limited	Swalek High Voltage Services Ltd	Swansea Building Society	Crosshands Home Services Ltd
ETTS	Red Brand Media	A H Prichard & Son	Altair Analytical Ltd	Eastgate Dental Laboratory Ltd
Evans and Sons Fixing Service Limited	The Music House	Cae Tan CSA	Baglan Bakery	Esteam
	Treasured Moments Photography	Carmarthenshire & Wales game farm	Burns Pet	Ffynnone Care Home
		D Millichap and partners	Calon Wen Dairy Produce Ltd	Fieldbay
		David Mason		

Survey Responders - continued

Foel Farm
Glanmorfa Care Home
Glasallt Fawr
Habitat Homecare
Hafan Cymru
Happy Days Childcare Wales Ltd
Haven Homecare
Home Instead Swansea
care without compromise
Human Support Group
KDHC Ltd
Living at home
Malthouse Vets
Marlowe St Davids
Mavalon Care Ltd
meadows nursing home
Moderncare
ND Care and Support
Orbis Education and Care
Pembroke Care Ltd
Pembrokeshire County Council
Peniel house care home
Plant Bach Y Wlad
Pobl Group
Prestige Care Pembs Ltd
Registered Manager
RSD Social Care Ltd
Rural Health and Care Wales
Rusev Care Limites
serenity natural health
Snap specialist playgroup
Steddy Itf
Swansea Bay Home Care Services
Swansea Bay University Health Board
The Rookery
Ty Gofal Ltd
Ty Seren
Waterview Care Ltd
WeCare Wales
West Wales Care Partnership
Willow Daycare Ltd
BCC IT
Carmarthenshire County Council Social Care
Cloud Genius Ltd
HENSON EDITORIAL SERVICES
ITEC Digital Training
Morgan + Morgan
PresMawr Ltd
Swiss Valley Data Services
TJB Digital Services

VehoGroup Ltd
Writemedia
Yoko Gawa Wrap
7sins
Afon Teifi Caravan Park
Badger
Bluestone Lesiure
bowen
Celtic Holiday Parks
Celtic Laser Ltd
Clydey Cottages
Coed Adam Holidays
Creative Hospitality Group
Cuts Company
CWRW Ltd
dylan coastal resort
Ennis Caravans Ltd
Folly Farm
Fresh East Ltd
Glangwili Mansion
Grove of Narberth
Haven Kiln Park
Heywood Spa Hotel
Hilton court
Ivybridge Guesthouse Limited
JD Wetherspoon PLC
Johns Gardening Services
LLANELLY HOUSE
Luxury Lodges
Lynwen's
Mark howell
McDonalds
melin tregwynt
Milton Bridge caravan Park
Monk haven Manor B & B
Morgans Hotel
Nathan Rowlands
Nature's Best Catering Ltd
Neath Afan Gymnastics Club
Newport Boat Club
Oakwood Themepark
Pembrokeshire Seaweeds Ltd
Penally Abbey Hotel Ltd
Penycoed Farms Leisure Ltd
Penygawse Tea Rooms
Picton Castle Trust
Premier Inn
Professional Security
Retreats Group
Rubys bar & brasserie

SCGC
Seasons Holidays Plc
Seren
Studio 4 Barbets
Swansea Arena
Swansea City Football Club
Tea Traders Ltd
The Great British Bird of Prey Centre Ltd
The Marine Group Ltd
The Queens Hall Narberth
The Rising Sun
TUI
Ty Hotel
West End Cafe
West Wales Holiday Cottages
Whitesands Beach House
y cerrig glas
Gatehouse ICS
The Magstim Company Limited
157 (Welsh) Regt RLC
4CG Cymru 2010 Ltd
Carmarthenshire County Council
cetma
Cwmaman TC
DVLA
DWP
Dyfed Powys Police
Hywel Dda University Health Board
Monmouthshire County Council
Neath Port Talbot Council
NPTC Training and Development
Pembrokeshire college
Pembrokeshire County Council
Pembrokeshire County Council (Futureworks)
South Wales police
Swansea Bay City Deal
Swansea Council - Health
Swansea Council - Education
a Dean Carpets
A1 Guns Ltd
Aber Gas Ltd
Avery
B&M
Barr & Co jewellery Ltd
Blodau blodwen flowers
Brumwell Garden Machinery
Cash & Carry Carpets
Eileen's
Electra MotoGear

Florence Wood
Gower Gallery
Gravells Kia Narberth
Gwaun Garage
Hearing Aid solutions
ivojo
Jamangie Trading Ltd
Jersey Bakery Ltd
Lawrence Lyons Exclusive Kitchens
LBS Builders Merchants Ltd
Leekes Crosshands
M & P Direct
Manselton MOT Centre
Parfitts carpets
rgtractors.com
Sians Emporium Ltd
ST CATHERINES WALK
Tesco
The Long Meadow Company
Wand BA Carpets & Blinds Ltd
WG DAVIES (Landore) Ltd
Antur Cymru
ateb group ltd
BING (Charity)
Business in Focus
Careers Wales
Citizens Advice Pembrokeshire
Faith in Families
Fishguard and Goodwick Young Person's Trust
FSB
HIHS
National Botanic Garden of Wales
The Poppy Factory
The VC Gallery
Davies Coaches Ltd.
First Cymru Buses
Great Western Railway (GWR)
JMS AGGREGATE SUPPLIES LTD
JOHN PEARCE GLYNNEATH LIMITED
John Raymond Transport Limited
M D S DISTRIBUTION LTD
MANSEL DAVIES & SON (GARAGES) LTD
Maskell removals
Midway Motors
Pdvi Pontantwn garage
penllain garage
South Wales Industrial Equipment Limited
Teddington Engineering Solutions
Marios Ice Cream

Regional Learning & Skills Partnership

