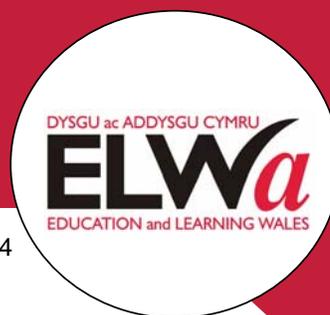


# Learning and Labour Market – Mid Wales



SHEET NUMBER: 3

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## 1. MACROECONOMIC INDICATORS

### United Kingdom

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

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

There are particular concerns about levels of consumer debt. A significant proportion of this is linked to inflation in the housing market, which accelerated during 2002 and again in 2004. Fears about inflationary pressures and a speculative bubble in the housing market has prompted the Monetary Policy Committee to raise base rates by 1¼ percentage points (to 4¼ % as of September 2004) since this time last year.

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

### Wales

There are indications that economic growth in Wales has been less robust than in the UK generally with production and construction output stagnant or falling slightly during 2003. GVA<sup>1</sup> per capita in Wales is just 79% of the UK average, but there is significant intra-regional variation. In West Wales and the Valleys, GVA per capita is two thirds of the UK average while South and East Wales exhibit near parity with the rest of the UK (Table 1). In rural Wales however, GVA per capita has declined in relation to both the UK and the all-Wales average (Table 2).

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

# Learning and Labour Market - Mid Wales

Table 1: Relative GVA per head: % UK

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

Table 2 GVA per Capita Rural and Mid Wales; % UK. NUTS 3 Areas

	1995	1998	1999	2000	2001
South West Wales	71	64	63	63	63
Central Valleys	70	66	65	65	65
Powys	84	78	76	73	71

Source: National Statistics (Crown Copyright)<sup>2</sup>.

## Employment

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

Employment growth has been quicker in Mid Wales than in all the other ELWA regions in Wales, with an increase in employment of over 9% (15,000 jobs). The region accounts for around 9% of total employment in Wales. There are around 115,000 jobs in Mid Wales, of which more than three-quarters are full time jobs (Table 3).

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

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

## Learning and Labour Market - Mid Wales

Table 3: Employment in Mid Wales, 2003/04

	Total Employment (000)	Jobs full-time (%)
Ceredigion	38	64.2
Powys	65	75.9
Mid Wales <sup>3</sup>	115	72.6

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

ABI statistics<sup>4</sup> show that between 1998 and 2002 there was a decline in employment in Mid Wales with the number employed falling from 74,739 to 72,492 (a 3% decline). Over the same period employment in Wales grew by 56,821 from 1,038,078 to 1,094,899. The employment loss in this area was primarily driven by job losses in the manufacturing and the distribution, hotels and restaurants sector, where over six thousand jobs were lost. Whereas the loss of manufacturing jobs was common to other regions in Wales, the loss of employment in the distribution, hotels and restaurants sector was unique to Mid-Wales.

The overall distribution of employment gains are in accordance with the national (Welsh) picture and concentrated in the service economy (Figure 1). In this respect there have been substantial gains recorded in public administration, education and health (3,200) and in other services (700 jobs). However, these gains were offset by the loss of around 3,500 manufacturing jobs and 2,700 jobs in distribution, hotels and restaurants sector. Evidently, were it not for the public sector and the service industries generally, the employment situation in Mid Wales would be very bleak indeed.

ELW<sup>a</sup>  
EDUCATION and LEARNING WALES

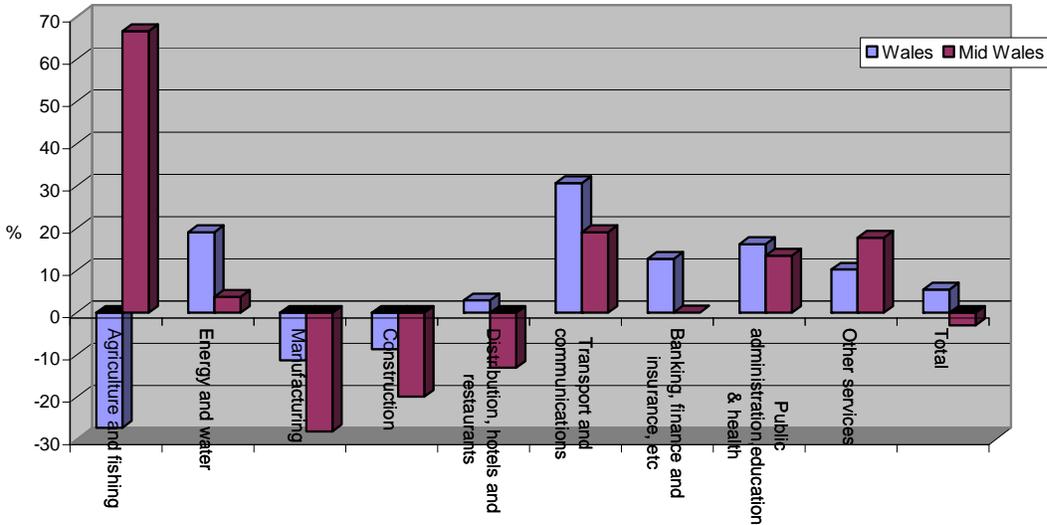


<sup>3</sup> The total given here is less than the 112,000 jobs recorded by the LFS for the ELW<sup>a</sup> Mid Wales region. This is because the latter figure also includes employment in parts of North Gwynedd.

<sup>4</sup> The Annual Business Inquiry provides estimates of **employees** in employment only and self employment is omitted.

# Learning and Labour Market - Mid Wales

Figure 1: Employment change by industry in Mid Wales, % 1998-2002



Source: Annual Business Inquiry<sup>5</sup>

Other key features of employment conditions in Mid Wales are summarised below:

- 79.5% of the working age population of the region are employed compared to the Welsh average of 72.1%. An estimated 28,000 people are self employed in Mid Wales - 24.8% of all jobs, twice the all-Wales rate of 12.4% and almost double the Great Britain rate of 12.7%
- Rates of job related training are marginally lower in Mid Wales than in Wales 14.1% compared to 14.3%. Generally more women of working age are in receipt of training than men (15.1% compared to 13.2% in Wales). Though the male rate is the same as the rate for Wales in general, the female rate is below the all Wales rate of 15.4%.
- Nearly 34.1% of the working age population of Mid Wales are qualified to NVQ 3 or above. This rises to 35.9% among those (of working age) in employment. Corresponding rates for Wales in total are 32.2% and 36.6% respectively.
- 17.8% of the working age population of Mid Wales are qualified to NVQ 4 or above and this rises to 19.9% among those in employment. The corresponding proportions for Wales are 17.7% and 21.1%.

<sup>5</sup> The ABI is unsuitable for evaluating employment trends in farming and consequently, the data in Figure 1 for agricultural and fishing are unlikely to be that meaningful. Readers interested in employment in agriculture and other land-based industries should visit the online websites referenced in the databank section of this publication.

# Learning and Labour Market - Mid Wales

## Earnings

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

**The Welsh workforce is among the lowest paid in Britain.** In April 2003, average weekly full-time earnings in Wales were £414 compared with £483 for England and £437 for Scotland. It is not just that Wales has more people at the bottom end of the pay distribution, **but it also has fewer at the top end.** In Wales, 21% of full time employees earn less than £250 per week while 31% earn more than £460. The corresponding proportions for England are 16% and 40% respectively. These figures also disguise important differences between genders. In Wales full time women earn on average £357 per week, which is 80% of the corresponding male figure and 89% that of women in England. There are also significant differences between the average wages of different occupations. Based on the SOC 2000 definition workers in professional occupations in Wales have the highest average wages at £625, while sales and customer service occupations earn just £266. In England it is managers and senior officials who have the highest average pay at £75 per week while those who work in personal service occupations have the lowest weekly earnings at £283.

Table 4: Average gross weekly earnings in 2003

	Full-time earnings (£ per week)	All Earnings (£ per week)
Mid Wales <sup>6</sup>	387	307
North Wales	399	326
South East Wales	429	364
South West Wales	398	331
All Wales	414	346
Great Britain	476	395

Source: New Earnings Survey (Workplace basis)

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

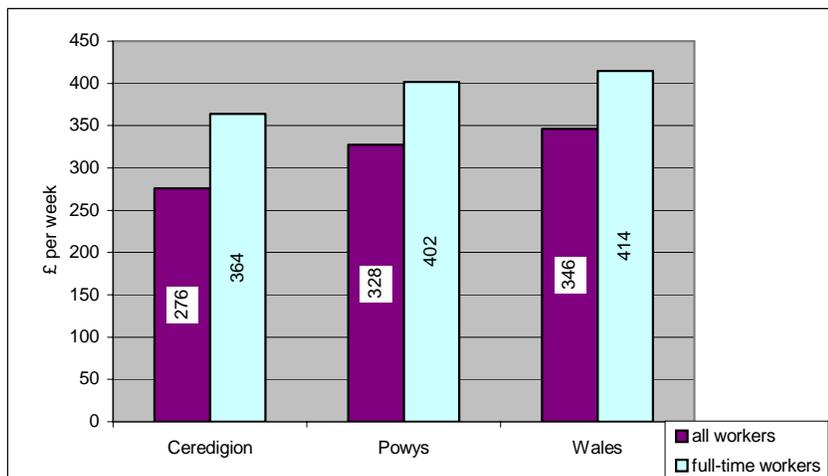
<sup>6</sup> Unless otherwise stated, Welsh regions are defined as ELWa regions. This means that Meirionnydd in Gwynedd is included within the Mid Wales region.

# Learning and Labour Market - Mid Wales

There are also significant pay differences within Wales, with employees in North and South East Wales on average earning more than their equivalent in Mid and South West Wales (Table 4). For example, in 2003 the average full-time employee in Mid Wales earned £27 per week less than the equivalent average Welsh worker and £89 less than the average British worker.

Differences in economic geography and in labour demand are responsible for these spatial variations in pay and average earnings in Powys are closer to the Welsh average than to Ceredigion, where earnings are substantially below the Welsh average (Figure 2).

Figure 2: Average gross earnings in Ceredigion and Powys, (Workplace basis)



Source: New Earnings Survey, 2003

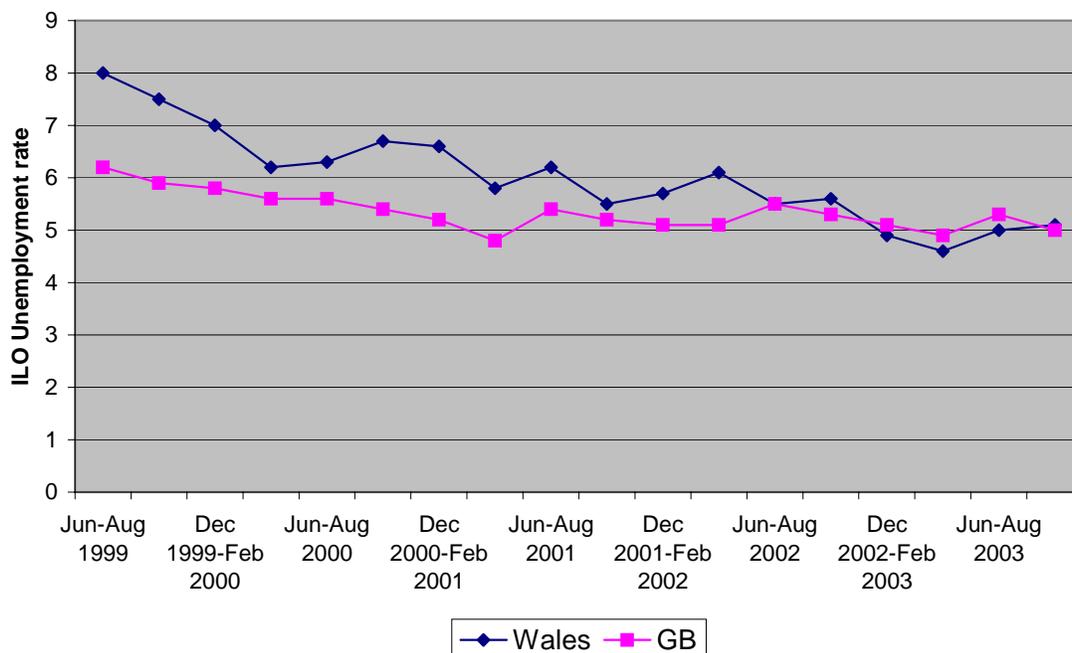
## 2. LABOUR DEMAND

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

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

## Learning and Labour Market - Mid Wales

Figure 3. ILO unemployment in Wales and Great Britain.



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

The Future Skills Wales Survey was undertaken in 2003 and some of what is reported below replicates information given in an earlier factsheet. However, this section has been supplemented with additional data, particularly at the unitary authority level. The Future Skills Wales 2003 project finds that the proportion of employers reporting hard-to-fill vacancies has more than halved since 1998 and currently stands at 14%. Yet this figure lies above that for England at 7%. The main cause of hard to fill vacancies was that applicants lacked the suitable skills required (25% of establishments). The main consequence of these hard to fill vacancies was the loss of business to competitors (16% of establishments). The main response to having hard to fill vacancies was to expand the recruitment channels (40% of establishments). Understanding customer needs, the ability to follow instructions, communication and team work are among the skills most required by employers.

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

A shortage of people with the necessary skills or experience is the most common reasons given by employers for "hard to fill" vacancies. However, many employers, especially in North and South West Wales also believe their inability to attract staff is due to unattractive rates of pay (Table 5).

## Learning and Labour Market - Mid Wales

Table 5: Hard-to-fill vacancies in Wales, 2003

### Percent of hard to fill vacancies attributed to

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

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

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

There is limited variation in the proportion of employers reporting vacancies within Mid Wales, with figures very close to the national average (Table 6). A greater proportion of employers report a skills gap in Ceredigion than Powys, although they do not appear to respond by increasing training. Just over half of all establishments in Wales have undertaken off the job training in the last year, which is greater than the corresponding figure for England (35%).

Table 6: Vacancies by unitary authority, 2003.

	% of employers reporting vacancies	% of employers reporting hard to fill vacancies	% of employers reporting skill gaps	% of employers providing off the job training in the last 12 months
Ceredigion	22	16	23	49
Powys	23	14	15	53
Wales	22	14	19	53

Source: Future Skills Wales, 2003 Survey.

### 3. LABOUR SUPPLY

#### Participation

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

## Learning and Labour Market - Mid Wales

There are indications that the activity rate gap has narrowed recently. As Table 7 shows, activity rates in Wales have continued to rise over the last four years. This increase has been seen in all regions and for males and females.

Table 7. Economic activity rates

Variable	2004	2001	2004	2001	2004	2001
	All Working Age	All Working Age	Working Age Males	Working Age Males	Working Age Females	Working Age Females
Mid Wales	83.1	76.7	86.7	84.5	79.2	68.5
Wales	75.7	73.1	79.9	78.2	71.3	67.6
Great Britain	78.7	78.7	83.7	84.2	73.4	73

Source: Nomis.

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

### Unemployment

Unemployment rates in Wales are currently at historically low levels, with the number of unemployed people, as measured by the claimant count, less than a quarter of the figure two decades ago. In September 2004, around 38,600 people representing 2.2% of the working age population were unemployed. In Mid Wales around 2,209 people were unemployed.

Unemployment is a cost to an economy in terms of foregone GDP. However, a question must arise as to the effectiveness of the unutilised labour supply. In this respect, claimant based sources of unemployment show that 14% of the unemployed in Wales (13% in Mid Wales) have been without work for at least a year, whilst, around 30% in both areas, have been unemployed for more than six months.

However, 42% of the unemployed in Wales are of 'prime age' i.e. aged between 25 and 44 years, while a further 33% are young people (under 25s). Corresponding figures for Mid Wales are 40% and 30% respectively.

# Learning and Labour Market - Mid Wales

## Population Change

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

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

Projections produced by the Government Actuary Department indicate that the population of Wales is expected to reach 3 million by around 2009. A particular feature of future labour supply is the ageing population. By 2009, a quarter of the Welsh population is expected to be over 60 years of age. This trend is predicted to continue so that by 2030 around a third of people in Wales will be over 60.

At the same time, the number of people under 20 years of age in Wales is expected to fall by around 25,000 by 2009, and is predicted to fall by another 30,000 by 2020. Between these two age groups, the 20-60 years population is expected to grow by 25,000 between now and 2017 after which it will decline steadily.

## 4. EDUCATIONAL FLOWS

### Education

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

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

For all ages,

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

There were 842 people aged 17 who entered two or more A/AS levels or achieved vocational equivalent in Mid Wales (Powys and Ceredigion) — this was 9% of the total across Wales. Overall pass rates and points scores were above average in both counties with an especially high proportion of passes at grades A-C in Ceredigion.

## Learning and Labour Market - Mid Wales

Table 8: Pupils aged 17 at the start of the academic year, 2002/03, by Local Education Authority<sup>(a)</sup>

maintained schools in.....	percentage of pupils entering two or more A/AS levels or achieved vocational equivalent who...			average points score per pupil entering two or more A/AS levels or achieved vocational equivalent
	number of pupils entering two or more A/AS levels or achieved vocational equivalent	achieved two or more A/AS levels grade A-C or vocational equivalent	achieved two or more A/AS levels grade A-E or vocational equivalent	
Powys	504	67	96	21
Ceredigion	338	77	97	21
<b>Wales<sup>(b)</sup></b>	<b>9,848</b>	<b>68</b>	<b>94</b>	<b>20</b>

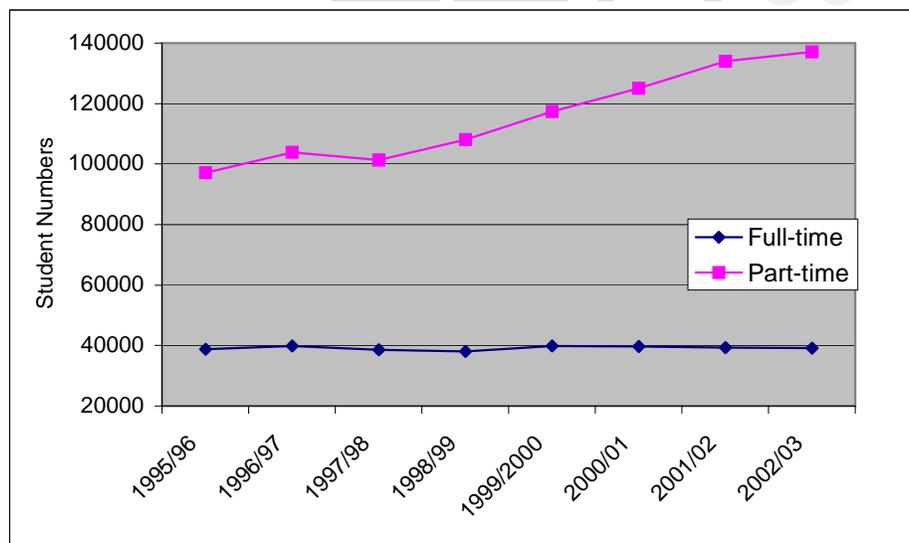
(a) Includes all A levels, A2 levels, and Advanced Vocational Certificates of Education (AVCE)

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

Source: Statistical Directorate, NAFW, November 2003

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

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

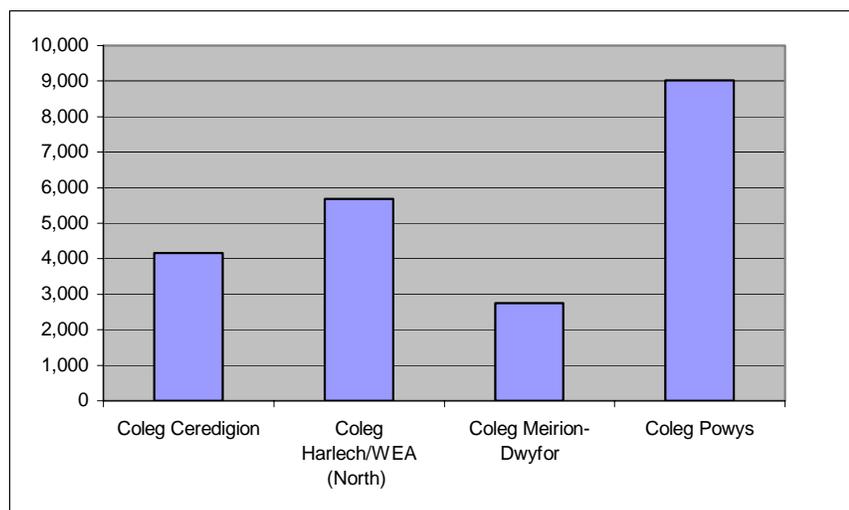


Source: ELWa

## Learning and Labour Market - Mid Wales

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

Figure 5: FE student numbers 2002/03: Mid Wales.



Source: ELWa

There are 4 colleges of further education in Mid Wales that during the academic year 2002/03 had a combined population almost 22,000 students - nearly 10 % of the total FE population in Wales (Figure 5). Coleg Powys is by far the largest FE provider in the region with around 9,000 students – 42% of the total FE market population in Mid Wales. At the other end of the scale Coleg Meirion-Dwyfor is the smallest institution with just 13% of the student market. In the region in total, part-time students considerably outnumber the full-time population - the ratio of PT/FT being 6.6 and slightly above the all-Wales average of 5.1<sup>7</sup>. However, there is considerable variation across the colleges ranging from 41.4 in Coleg Harlech to just 1.7 in Meirion-Dwyfor (Table 9). Although both colleges are located in Meirionnydd, there would appear to be fundamental differences in the nature of the learning provision afforded by each institution, which are reflected, in the contrasting emphasis on full and part-time delivery modes.

<sup>7</sup> There is a discrepancy between this ratio and the all-Wales figure of 3.5 given earlier. This is due to the use of different sources. The smaller figure is derived from a count of the number of students registered during a given week in the Autumn term (the Census week) whereas the larger number is obtained from the student count for the whole year.

## Learning and Labour Market - Mid Wales

Table 9: Mid Wales FE institutions 2002/03: Market shares and PT/FT student ratios.

Institution	Student Shares %	Ratio PT/FT
Coleg Ceredigion	19	4.8
Coleg Harlech/WEA (North)	26	41.4
Coleg Meirion-Dwyfor	13	1.7
Coleg Powys	42	8.2
<b>All Mid Wales</b>	<b>100</b>	<b>6.6</b>

Source: ELWa

Table 10 provides a summary analysis of the age profile, mode of learning and gender of students enrolling at FE colleges in Mid Wales. It shows that students enrolled onto full-time courses are distributed roughly equally between males and females. However, the more flexible modes of study would seem to appeal more to women students who account for 60% of the combined enrolment onto part-time day studies, evening classes and distance / open learning.

Table 10: FE Students enrolled at FE Institutions in Mid Wales by age, mode and gender, 2002/03

Age analysis	Full-time / Sandwich	Part-time day	Evening only	Other	Open & Distance Learning	Unknown	All modes
18 and under	2,028	1,164	117	2	62	1	3,374
19-20	174	392	108	5	41	3	723
21-24	136	712	251	13	86	2	1,200
25-39	297	3,450	1,512	1	312	7	5,579
40-59	172	4,190	2,332	3	323	3	7,023
60+	22	1,914	982	0	127	1	3,046
Unknown	6	312	350	0	7	0	675
Total	2,835	12,134	5,652	24	958	17	21,620
Of whom,							
Males	1,357	5,209	1,907	8	308	4	8,793
Females	1,478	6,925	3,745	16	650	13	12,827

Source: ELWa

It would also seem that a greater proportion of mature adults are opting for the more flexible routes of study. For instance, 72% of the full-time student population are aged 18 or under while across all modes the corresponding proportion is just 16%. Among those students pursuing part-time day courses, evening classes or open / distance learning – around one half (53%) are aged 40 years or over while just 1 in 14 (i.e. 7%) of full-time students are aged 40 or above.

# Learning and Labour Market - Mid Wales

## Adult Continuing Education (ACE)

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

Table 11: All Wales and Mid Wales Adult and Continuing Education participation (number of learners in week 1 December 2002)

Adult Continuing Education	Wales	Mid Wales
Maintained provision	15,115	1,168
Contracted out	3,457	1,054
Assisted	5,120	545
Contracted in (included under FE)	26,136	1,066
<b>Total Adult Continuing Education</b>	<b>49,828</b>	<b>3,833</b>
ACE individual enrolments	55,710	3,906

Source: ELWa

The region accounts for around 7% of all ACE enrolments in Wales and this is consistent with its size given it has 7% of the working age population (8% of the adult population) of Wales.

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## 5. QUALIFICATIONS

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

### Aims

Table 12 shows the subject areas elected by students enrolled at FE institutions in Mid Wales during 2002/03. The single most popular subject accounting for almost one fifth of all qualification aims was IT (19%). Cultural Studies (12%) Care (11%) and Business and Management subjects (11%) were next in the preference ordering. There is some evidence of a slight regional bias towards Cultural Studies and Agriculture in Mid Wales, but on the whole student preferences and provision in the Mid Wales region is not that different from the rest of Wales. Indeed in an economy, which increasingly requires administrative and IT skills and more care workers and health personnel, the choices displayed by students in the FE sector are quite rational. With employment in the production and construction sectors insecure, it should be no surprise that individuals are turning away from subjects like the built environment, engineering and manufacturing, even if it may not be in the economy's long term interests.

## Learning and Labour Market - Mid Wales

Table 12: Student qualification aims by subject, 2002/03

Subject for each Qualification aim	Mid Wales No	Mid Wales %	All Wales %
Business and Management	5,369	11	8
Sales/Marketing	279	1	1
IT	9,436	19	18
Humanities	1,265	3	2
Social Sciences	320	1	1
Cultural Studies	5,872	12	8
Education	2,526	5	4
Care	5,583	11	16
Arts and Crafts	2,574	5	4
Media	2,485	5	6
Performing Arts	533	1	1
Sports	331	1	1
Hotel and Catering	2,076	4	5
Health	3,004	6	8
Environment	47	0	0
Science/Maths	2,050	4	7
Agriculture	2,996	6	2
Built Environment	876	2	3
Services to Industry	43	0	0
Manufacturing	425	1	1
Engineering	830	2	3
Mining/Chemicals	0	0	0
Transport	241	0	0
Not Specified	320	-	-
Total	49,481	100	100

Source: ELWa

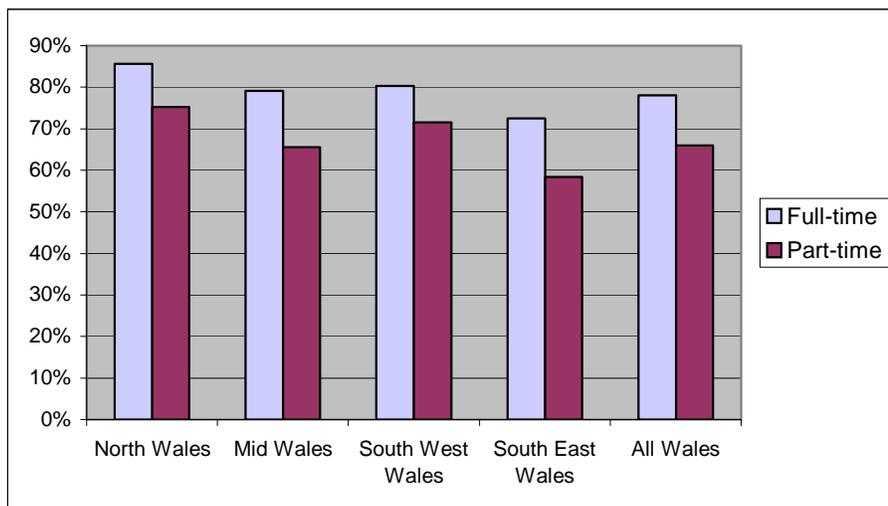
### Attainment Rates

Attainment rates measure the number of qualifications fully achieved as a percentage of the qualifications based programmes completed (whether successfully or not). In 2002/03 the average for 'mainstream A qualifications'<sup>8</sup> came to 76% in Mid Wales, slightly more than the all-Wales average of 74%. Differentiating between full and part-time provision, the attainment rate is almost universally higher for full-time students than part-time ones. In the Mid Wales region the attainment rates were 79% and 66% respectively. Regional comparisons are shown in Figure 6.

<sup>8</sup> These include GNVQ, Advanced VCE, NVQ, GCSE, First, National, A/AS Level and Access to HE

## Learning and Labour Market - Mid Wales

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



Source: ELWa

Generally lower part-time attainment rates are perhaps not altogether surprising given that those engaged in part-time study differ from the full-time student population. They may be confronted by greater obstacles to learning and may take longer to achieve their qualification aims. However, the effect of mode of study on attainment is less discernable in data for individual FE institutions suggesting that the institutional attainment rate may be a more complex phenomenon (Table 13).

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Table 13: Attainment rates by institution; Mid Wales 2002/03

	Attainment Rate (FT) (%)	Attainment Rate (PT) (%)
Coleg Ceredigion	72	73
Coleg Harlech/WEA (North)	61	n/a
Coleg Meirion-Dwyfor	92	78
Coleg Powys	60	59
<b>All Mid Wales</b>	<b>79</b>	<b>66</b>

Source: ELWa

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## Training

Analysis of training supported by ELWa in Mid Wales highlights that during 2003/04 the most prominent programmes were Skillbuild, Modern Apprenticeships and Foundation Modern Apprenticeships (Table 14). In total 2,050 trainees were recruited in Mid Wales - 6% of the Wales total. While the overall pattern of training in Mid Wales was similar to Wales as a whole, the former had a strikingly smaller percentage of Skillbuild recruits and a far higher proportion of Adult endorsed learners.

Table 14: Trainee recruitments, 2003-04

Programme	Mid Wales (%)	Wales (%)
Skillbuild	17.4	26.8
Foundation Modern Apprenticeship	28.7	31.2
Modern Apprenticeship	27.7	24.7
Other Youth Programmes	0.0	0.0
MSDA (Modern Skills Diploma for Adults)	6.0	2.7
Adult standard	10.4	9.3
Adult endorsed	9.9	5.3
All	100.0	100.0

Source: ELWa

## Local Area Tables

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

Key outputs include:

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

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

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2000-2001	Learners by Mode of Learning			Learners by Highest Qualification Aim Level																			
	FT	PT	WBL	NVQ Level 4+	Key Skills Level 4+	NVQ Level 3	BTEC National Qualification	GNVQ Advanced	Advanced VCE	GCE A/AS Level	Key Skills Level 3	OCN Unit(s)	NVQ Level 2	BTEC first qualification	GNVQ Intermediate	GCSE	Key Skills Level 2	NVQ Level 1	GNVQ foundation	Key Skills Level 1	SLDD course	Other	Not known
Gwynedd - South	713	1,752	485	10	0	165	93	142	66	209	9	435	349	*	11	8	43	101	0	38	14	1,007	246
Powys	1,187	6,664	1,920	25	0	669	219	146	41	160	45	1,900	1,079	7	*	255	81	279	0	164	225	2,458	2014
Ceredigion	623	3,289	954	27	0	380	148	60	48	110	52	969	647	17	31	62	46	74	11	32	26	1,639	487
<b>Mid Wales - all</b>	<b>2,523</b>	<b>11,705</b>	<b>3,359</b>	<b>62</b>	<b>0</b>	<b>1,214</b>	<b>460</b>	<b>348</b>	<b>155</b>	<b>479</b>	<b>106</b>	<b>3,304</b>	<b>2,075</b>	<b>24</b>	<b>42</b>	<b>325</b>	<b>170</b>	<b>454</b>	<b>11</b>	<b>234</b>	<b>265</b>	<b>5,104</b>	<b>2,747</b>

Note: Gwynedd - South refers to the district of Meirionnydd.

2000-2001	Number of Qualifications Attained by Qualification Level																					
	NVQ Level 4+	Key Skills Level 4+	NVQ Level 3	BTEC National Qualification	GNVQ Advanced	Advanced VCE	GCE A/AS Level	Key Skills Level 3	OCN Unit(s)	NVQ Level 2	BTEC first qualification	GNVQ Intermediate	GCSE	Key Skills Level 2	NVQ Level 1	GNVQ foundation	Key Skills Level 1	SLDD course	Other	Not known		
Gwynedd - South	*	0	77	34	60	*	545	16	346	195	11	23	38	114	42	0	101	18	844	36		
Powys	5	0	263	64	96	72	200	61	1,563	673	20	40	151	508	101	*	450	430	2,822	379		
Ceredigion	13	0	254	76	143	0	110	111	543	508	13	20	61	316	32	*	92	44	1,839	62		
<b>Mid Wales - all</b>	<b>18</b>	<b>0</b>	<b>594</b>	<b>174</b>	<b>299</b>	<b>72</b>	<b>855</b>	<b>188</b>	<b>2,452</b>	<b>1,376</b>	<b>44</b>	<b>83</b>	<b>250</b>	<b>938</b>	<b>175</b>	<b>0</b>	<b>643</b>	<b>492</b>	<b>5,505</b>	<b>477</b>		

2000-2001	Number of Qualifications Attained by Subject																							
	Business and Management	Sales/Marketing	IT	Humanities	Social Science	Cultural Studies	Education	Care	Arts and Crafts	Media	Performing Arts	Sports	Hotel and Catering	Health	Environment	Science/Maths	Agriculture	Built Environment	Services to Industry	Manufacturing	Engineering	Mining/Chemicals	Transport	Not specified
Gwynedd - South	378	32	385	60	39	219	24	152	40	66	37	36	198	283	0	204	104	54	6	42	88	0	12	47
Powys	954	91	952	42	48	142	235	1,692	145	218	31	126	710	714	7	251	324	238	27	136	207	0	84	525
Ceredigion	860	39	434	313	21	237	66	479	71	160	14	17	513	316	11	136	193	138	9	64	128	0	10	11
<b>Mid Wales - all</b>	<b>2,192</b>	<b>162</b>	<b>1,771</b>	<b>415</b>	<b>108</b>	<b>598</b>	<b>325</b>	<b>2,323</b>	<b>256</b>	<b>444</b>	<b>82</b>	<b>179</b>	<b>1,421</b>	<b>1,313</b>	<b>18</b>	<b>591</b>	<b>621</b>	<b>430</b>	<b>42</b>	<b>242</b>	<b>423</b>	<b>0</b>	<b>106</b>	<b>583</b>

# Mid Wales Learning and Labour Market

## 6. SUMMARY DATABANK

### Key Statistics: UK

Annual % change unless otherwise stated

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

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

Source: CBI Economic Bulletin, September 2004

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

Source: Bank of England

### Agriculture Data

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

*The Sector Skills Council for the Environmental and Land Based Sector*

<http://www.lantra.co.uk>

## Mid Wales Learning and Labour Market

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

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<sup>9</sup> November factsheets prepared by MGS Economics in association with WELMERC