

Research Report into the Training  
and Skills Needs of Businesses in the  
Heart of the South West LEP

Transition Area  
(Devon, Torbay and Plymouth)

November 2020



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Date of document: November 2020

Version: Final

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## Acknowledgements

We would like to thank the many individuals who gave their time to assist in the evaluation, including Kirsty Mottram, Rachel Crossey and Tina Paul at Serco, for their support in disseminating the survey across their networks, as well as the public organisations and partners throughout the region for sharing the survey and to the businesses who responded. This research would not have been possible without all of these contributions.

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## Executive summary

Serco's Employment, Skills and Enterprise delivers the Skills Support for the Workforce (SSW) programme to upskill employees of small and medium sized businesses. Delivered across the Heart of the South West Local Enterprise Partnership (LEP), as well as other LEP areas, the programme provides accredited qualifications and bespoke training courses to enhance employees' skills. The impacts are to increase the productivity of businesses and boost the local economy.

To ensure the services offered through the SSW programme remain relevant, and to support strategic aims of the Heart of the South West LEP, research into the skills needs of local businesses was commissioned. This report details the findings of Wavehill's research study surveying over 340 businesses in the Heart of the South West LEP area. The fieldwork for this piece of research was conducted as an online and telephone survey from January to March 2020, when the outbreak of Covid-19 in the UK restricted the capability to gather further data. Results from the respondents were analysed to provide insight into the skills and training needs of businesses across all industries, including a specific focus on the Energy and Engineering sectors.

The rapid pace of digitalisation of many aspects of the economy and the skills challenges this brings are a key context to the research, alongside policy on energy and sustainability born of the climate change crisis. The economic context, prior to the Covid-19 pandemic and subsequent recession, for which data is available, showed productivity challenges in the UK, but broad strengths in the Heart of the South West with high levels of economic activity (82.4 per cent) and low unemployment leading to skills shortages and hard to fill vacancies. Within the Transition area of the Heart of the South West, many employees are underutilised and four per cent of the workforce are not proficient in their role. A lower proportion of the working age population with higher level qualifications than in the UK may be a contributing factor to both skills shortages and hard to fill vacancies, which is especially true in Plymouth and Torbay.

While national data is not yet available for these indicators, other metrics suggest that the socio-economic impacts of the post Covid-19 pandemic recession are going to be rises in unemployment, and some sectors having to adapt as the economy undergoes structural shifts. In this quickly changing context the need for reskilling parts of the labour market is going to be highly important.

The findings of this research show 83 per cent of businesses had a vacancy in the last 12 months, an increase on comparable figures of 68 per cent in 2017. Of these, nearly half reported that they had hard to fill vacancies, with an incidence rate of 39 per cent of all businesses in the Transition area. A low number of applicants with the required skills was the most cited reason for hard to fill vacancies (by 52 per cent of respondents) along with a low number of applicants generally (by 41 per cent of respondents). A higher proportion of hard to fill roles were in the higher value occupations such as skilled trades and professional occupations.

For 52 per cent of the respondents, technical skills specific to the sector or role were lacking among the applicants. General employability and work readiness were cited by 34 per cent of the businesses and a lack of digital skills by 11 per cent. Almost a quarter reported a lack of technical qualifications with examples including NVQ2 Carers, Construction apprenticeships and NVQ3 Healthcare.

Seventy-four per cent of the respondents in the Transition area reported that the impact of hard to fill vacancies was to increase the workload of other staff. This was lower than comparable figures for the Heart of the South West (87 per cent) and Devon (84 per cent) in 2017. Some 14 per cent reported that hard to fill vacancies were leading to difficulties introducing new technology and 19 per cent that it was causing difficulties in introducing new working practices, both reflecting potential barriers to innovation and productivity.

In the Transition area, 42 per cent of business respondents stated that they were prepared to offer training to less qualified recruits to overcome the challenge of hard to fill vacancies. Thirty-five per cent also reported they would increase training to the existing workforce which was much higher than the comparator figure of six per cent in 2017.

Just over half the respondents reported having a training budget on average, with a greater proportion of larger businesses reporting training budgets, than micro organisations. Eighty-four per cent of businesses had staff who had undergone some form of training in the last 12 months, a higher proportion than comparable figures in 2017. This training was generally job specific and 66 per cent of businesses reporting training was provided internally. Of the businesses who used external private training providers (52 per cent), universities (seven per cent) or colleges (14 per cent) over 150 were cited in the Transition area. These were therefore mainly unique to the businesses and their sector, though Plymouth University, SSG, Petroc and the University of Exeter were all mentioned by at least eight separate firms each. The training they received was highly regarded and scored at 4.52 out of 5.

Barriers to training were mostly cost of training (cited by 31 per cent of respondents) and not being able to spare staff time (31 per cent). These results were slightly above those found in comparable studies in 2017.

In the Transition area 39 per cent of respondents had some link to academic institutions, and nearly half of these was through offering internships and placements. Half of respondent businesses had links to schools or colleges and for the majority (82 per cent) this was through offering work experience, and 49 per cent offered apprenticeships and traineeships. Of the 18 per cent who did not engage with any academic or other skills providers this was mostly because there was no business need.

Thirty-seven per cent of businesses surveyed in the Transition area took on apprentices, with over half of these (55 per cent) doing so to support young people and recruit new staff (59 per cent). Where businesses did not take on apprentices 34 per cent stated this was because they did not consider apprentices suitable to their business model, though 18 per cent reported they did not know enough about it. One third of the businesses in the Heart of the South West said they would consider taking on apprentices in the future if there was additional support.

General digital skills were most in need by over one third of businesses in the Transition area over the next three years much of this driven by digitalisation and introduction of digital technology. To improve their organisation in the next three years, 69 per cent of businesses sought basic IT and computer skills training, though there were other needs including digital marketing (35 per cent), computer networking (26 per cent), programming (29 per cent) and digital design (23 per cent) were all cited.

Over half of the businesses in the Transition area were looking to train their existing staff to become proficient in the digital skills needs and almost a quarter were going to recruit skilled staff members. Eleven per cent of the businesses felt that to no extent did they have the existing digital skills capabilities to prepare for increasing digitalisation. Broadly there was a confidence among these businesses however, that they could meet their future digital skills needs.

While 90 per cent of the respondents reported they promoted or delivered clean growth and sustainability, the remaining 10 per cent did not. Of those who did, most examples were standard practice of recycling, using energy efficient appliances and eco-friendly materials and products. Nearly half of businesses reported that they offered some training on sustainability and clean growth and there was little link between a lack of skills and sustainability.

Despite the challenges brought about by the Covid-19 pandemic, the research shows that training is highly important to overcome challenges such as low productivity and improving revenue and service offering. It is important that businesses are supported to help overcome the challenges they face in accessing training for their staff and that any such training is specific enough to be useful to the business. Digital skills training is an opportunity for wide sectoral impact and with the increasing pace of digitalisation there remain a high proportion of businesses in the Developed area of the Heart of the South West LEP which may struggle to fulfil these skills needs internally. Finally, encouraging closer integration between businesses and the range of training providers available, including universities and colleges is important, and likely to grow with economic restructuring during the recovery from the pandemic induced economic shock.



# 1 Introduction

The Skills Support for the Workforce (SSW) is a programme developed to upskill employees within small and medium-sized employers. The programme provides recognised accredited qualifications and bespoke training courses to enhance employees' skills, increase competitiveness and boost the local economy. Skills Support for the Workforce is co-financed by the Education and Skills Funding Agency (ESFA) and European Social Fund (ESF).

Serco's Employment, Skills and Enterprise business (Serco Ltd) is the Prime Contractor of the SSW programme in the Heart of the South West (HotSW) Local Enterprise Partnership geographical region. The Education and Skills Funding Agency commissioned Serco to conduct research to understand employers' skills needs in the Heart of the South West as part of the Local Enterprise Partnership's (LEP) skills planning, which in turn forms part of their wider strategic agenda. Serco commissioned Wavehill to deliver this piece of research.

To inform the strategic direction of the SSW programme and ensure that the training provision is responding to the needs of the businesses within the local economy, up to date evidence of such skills requirements is necessary. Against a context of an increasingly changing economy, from Brexit to digitalisation and environmental considerations, as well as large projects in the region such as Hinkley Point C, the skills need of businesses are constantly changing. As part of the evidence base gathered during the development of the Local Industrial Strategy (LIS) for the Heart of the South West LEP, it was identified that a stronger understanding of the longer term skills needs in the Energy, Engineering and Digital sectors would be beneficial.

Furthermore, a key theme of the UK Industrial Strategy has been the challenges posed by productivity in the economy, and how skills can contribute to resolving this issue. Training provision is recognised to be delivery led while businesses often consider their skills requirements in the short term only, and this approach fails to provide strategic intervention that can decidedly influence local economic performance. Therefore, to improve longer term understanding and develop evidence to support the demand led training delivery, research into such skills needs was commissioned. The research requirement reflected both the importance of ensuring the SSW programme was demand led to be more effective, and the focus on Energy, Engineering and Digital (recognising Digital as a cross sectoral skills need) in the Heart of the South West LEP.

The project was initiated in late 2019, and a survey designed to capture the evidence on the skills and training requirements across a range of themes for businesses in both the Energy and Engineering sectors, and also a wider sample of all sectors to reflect the local economy. The Heart of the South West LEP area was divided into two areas reflecting the European funding priority areas within the geography; Somerset constituting a "Developed" area. While Devon, Plymouth and Torbay are "Transitional". The project targeted 675 business responses to the survey in each area and the survey was scheduled to complete in March 2020.

Challenges with gathering respondent businesses and then the outbreak of Covid-19 and subsequent lockdown of the UK, restricted the number of survey results captured. Three-hundred and forty businesses took part in the survey across the Heart of the South West with 242 from the Transition part of the LEP area (Devon, Plymouth and Torbay). Given the changing context and continued difficulties with conducting fieldwork with businesses, it was decided to process and analyse the results based on these numbers. The results from the Transition area will be presented in this report.

## 1.1 Methodology

A survey was developed in conjunction with Serco and the Heart of the South West LEP to ensure it captured all the aspects that were required by the stakeholders. These questions reflected those asked in national surveys (such as the UK Employer Skills Survey), to allow comparison of results and aid recognition among respondents, and others designed specifically for this project. The nature of the topics included:

- Vacancies
- Hard to fill vacancies and skills shortages
- Training requirements
- Relationships with existing training providers
- Apprenticeships
- Digitalisation needs
- Environmental considerations

Though the survey was designed to be relevant to all businesses in the Heart of the South West to ensure its uptake, a sample frame was developed to reflect the emphasis on the Energy and Engineering sectors in the Heart of the South West. To generate responses from those with broader training needs the sample frame was focussed on those with small (>10 employees) and medium (>50 employees) firms. To reflect that the Digital agenda is one that cuts across industries the sample frame also included businesses across all sectors and was designed to imitate the sectoral structure of the business population in the Heart of the South West. This led to a broad sample of businesses for which commercial contacts were purchased from Experian based on this sample stratified by sector and size with quotas for each. All businesses had to also have at least two employees to participate in the survey. These contacts provided telephone numbers for primary data gathering as part of the telephone survey.

In addition to the telephone approach the survey was disseminated online through social media, local authority and LEP websites and through a network of associates and partners by Serco. Promotion material was developed to articulate the survey which was revised at several points to ensure it was targeted and reactive to the challenges that emerged.

### 1.1.1 Methodological limitations

The initial survey period was due to last for six weeks though it proved difficult to gather respondents at a sufficient rate to return the targeted number of businesses in that timeframe. The low response rate was due to a number of factors including relevance of the survey to businesses and breadth of sectors being asked to participate, length of the survey and that other business surveys that had taken place in the past six months leading to fatigue among respondents.

An extension was therefore necessary and though this provided additional time to complete the fieldwork, the data gathering then ran into the outbreak of COVID-19 in the UK and subsequent lockdown in March 2020. With SMEs facing existential challenges posed by the pandemic and many of the contact numbers commercially purchased giving office landlines that were no longer open, it was agreed that data gathering should cease. Given the data gathered may provide some important evidence for the needs of businesses in the short-term and could support the LEP and Local Authorities in their response to the COVID-19 outbreak, the results captured to date were analysed and are presented in this report.

After the survey fieldwork was closed due to the outbreak of COVID-19, the responses were analysed by Wavehill. Qualitative answers were coded, and cross tabulations based on firmographics used to provide breakdowns of the evidence gathered. Comparisons have been made to other benchmarks where appropriate and calculated for the Transition area from the authorities it comprises. These analysed results are presented in this report.

## 1.2 Context

The increasing pace of digitalisation and its impact on the economy and business is influencing the skills needs of businesses across the UK. The decision to leave the European union in 2016 has also impacted on the attitudes and approaches of businesses within the UK with implications for investment in capital and labour as well, shifting labour markets in response to fluctuations in migration. Following the actual departure of the UK from the European Union there may be further consequences on labour markets and skills provision in the UK across a variety of sectors.

As outlined, the Heart of the South West LEP are in the process of finalising their Local Industrial Strategy with the Department for Business, Energy and Industrial Strategy (BEIS) and as part of the development of this have identified key areas for the future of the LEP area. These include Marine, Microelectronics and Photonics, Nuclear, Aerospace and Science and Innovation. Common to areas are the Energy and Engineering sectors with Digital cross cutting theme which affects these sectors and much of the future economy. In response this research provides some analysis based on these sectoral areas.

Furthermore, environmental impact and sustainability have been growing as an agenda for many years, and through policy requirements, habit and social obligation businesses are considering how their activities can fit within this agenda. The Heart of the South West has a focus on sustainability and reducing environmental impact of any growth. Capturing the demand from businesses in these areas is important to understand how recruitment and training can be used to support clean growth and develop the economy.

These, alongside a myriad of other factors, serve to change the skills needs of businesses requiring new curriculum and training programmes to reflect the demand.

### 1.2.1 Economic context

Economic indicators for the Heart of the South West economy are mostly in line with or slightly above the national average. In terms of output performance, the economy contributed £35.2bn to GVA in 2017 and between 2012 and 2016 had grown by 17 per cent. Over this period recruitment has increased across the UK with the number of vacancies up nine per cent in 2017 on 2015.<sup>1</sup> Correspondingly rates of economic activity are high, up to 82.4 per cent in the Heart of the South West compared to a UK average of 78.9 per cent, and the availability of jobs, demonstrated through the job density ratio<sup>2</sup> (0.87), is slightly above the UK rate of 0.86.

The Employer Skills Survey (ESS) provides insight into the skills and vacancy position of businesses in the UK and is published every other year. Though the data for 2019 has been collected the latest published results are from 2017 and as a result this report draws on the 2017 data as a benchmark for the findings of this research.

Eight per cent of businesses in the UK had vacancies that were 'hard to fill' in 2017 with skills-shortage vacancies responsible for 22 per cent of shortages. In the Heart of the South West skill shortage vacancies represented 26 per cent of all vacancies, while it was 29 per cent of vacancies in Devon, 25 per cent in Torbay and 16 per cent in Plymouth (which comprise the transition area). Skills shortages have implications for staff workload, loss of business, and delays to developing new products or services.

Higher qualification levels in the Heart of the South West are low compared to the UK average (see figure 1.1). Of the working age population in the Heart of the South West, 35.8 per cent are qualified to at least NVQ level 4 or equivalent compared to 39.5 per cent in the UK. The proportion is lower in the Transition area (34.4 per cent). Qualifications have an impact on skills, productivity and on earnings which are also lower in the Heart of the South West than national averages (£531.80 pw compared to £587 pw in the UK).<sup>3</sup>

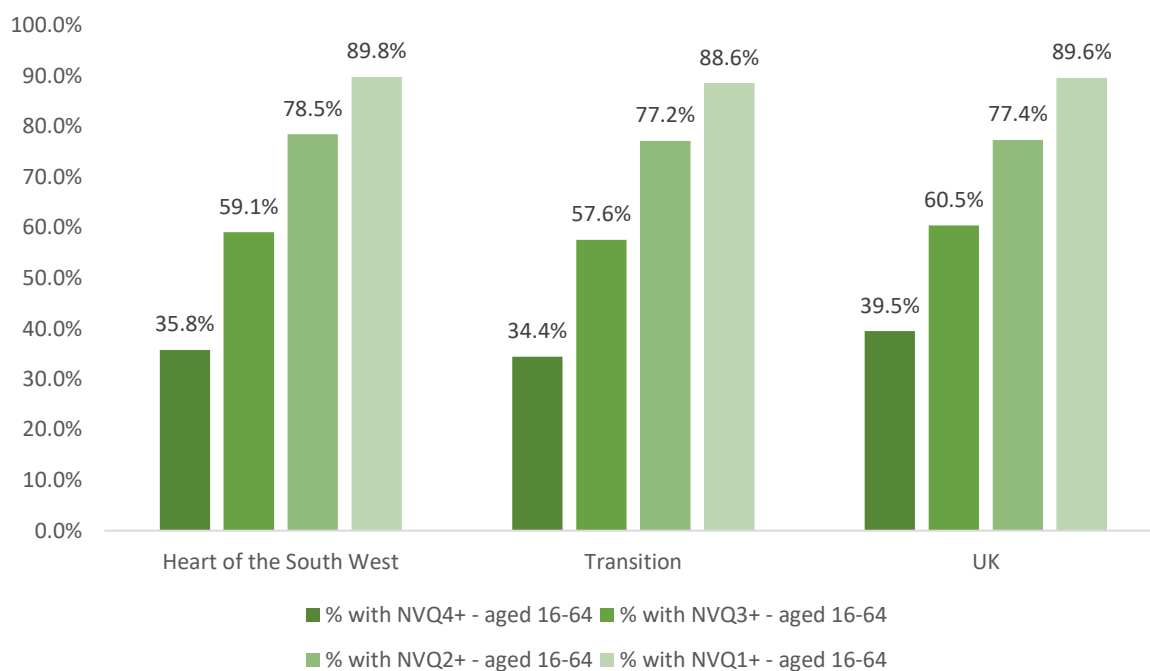
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<sup>1</sup> Employer Skills Survey 2017, Department for Education, August 2018

<sup>2</sup> An indicator of the availability of jobs in an area. A job density of 1 would equal 1 job for every 1 person of working age. Job Density, ONS, 2019

<sup>3</sup> Annual Survey of Hours and Earnings & Annual Population Survey, ONS, 2019

**Figure 1.1: Qualification levels among the working age population in HotSW, the Transition area and the UK (Three-year average, 2017-2019)**



In Devon, Plymouth and Torbay, unemployment is 2.9 per cent, 4.3 per cent and 3.8 per cent respectively, compared to the UK at 3.9 per cent. Economic activity is 83.8 per cent in Devon, similar to the LEP average (82.3 per cent), though Plymouth (77.6 per cent) and Torbay (78.1 per cent) are lower. A lower proportion of the working age population hold NVQ4 or equivalent and above higher level qualifications in Plymouth and Torbay (31 per cent and 31.9 per cent respectively) compared to Devon (37.6 per cent) and the UK (39.5 per cent).

Skills gaps also exist within organisations and 13 per cent of businesses reported their workforce was not fully proficient in the UK in 2017, equivalent to some four per cent of the workforce. In comparison, the Heart of the South West ESS data shows that the proportion of staff not fully proficient was at six per cent, and this was higher in Plymouth (seven per cent), though lower in Devon (five per cent) and Torbay (four per cent). Thirty-four per cent of businesses reported an underutilisation of staff in the UK, and this was higher in the Heart of the South West at 36 per cent. A higher proportion of Plymouth businesses (46 per cent) reported underutilisation of staff than in Devon (34 per cent) and Torbay (36 per cent).

Staff not receiving appropriate training was a factor in 25 per cent of these skills gaps in the UK, rising to 30 per cent in the Heart of the South West. In Devon staff not receiving appropriate training was a factor in 26 per cent of skills gaps, similar to Torbay at 37 per cent, though in Plymouth it was 32 per cent. The introduction of new technology was responsible for 18 per cent of skills gaps in the UK and in the Heart of the South West, while in Devon and Torbay it was lower at 14 per cent, but higher in Plymouth at 22 per cent. It is these such businesses that may be able to benefit from the SSW programme and support made available by the LEP.

The ESS also shows that 63 per cent of employers in the UK anticipated their skills requirements would change in the next 12 months. For 38 per cent of these businesses this change in skills needs of their staff was due to new technology though 13 per cent also cited Brexit as a reason. In the Heart of the South West 42 per cent reported that technology was driving the change in skills needs and similarly 13 per cent thought Brexit implications were a reason. In Devon the proportion reporting technology drivers was 38 per cent while in Plymouth it was 40 per cent and in Torbay, 32 per cent. Fourteen per cent of businesses in Devon thought Brexit was the reason for the change in skills needs compared to 16 per cent in Plymouth but only seven per cent in Torbay.

## 2 Survey results

There were 243 respondents to the survey for the Transition area of the Heart of the South West LEP. This report will present the figures for the Transition area.

### 2.1 Firmographics

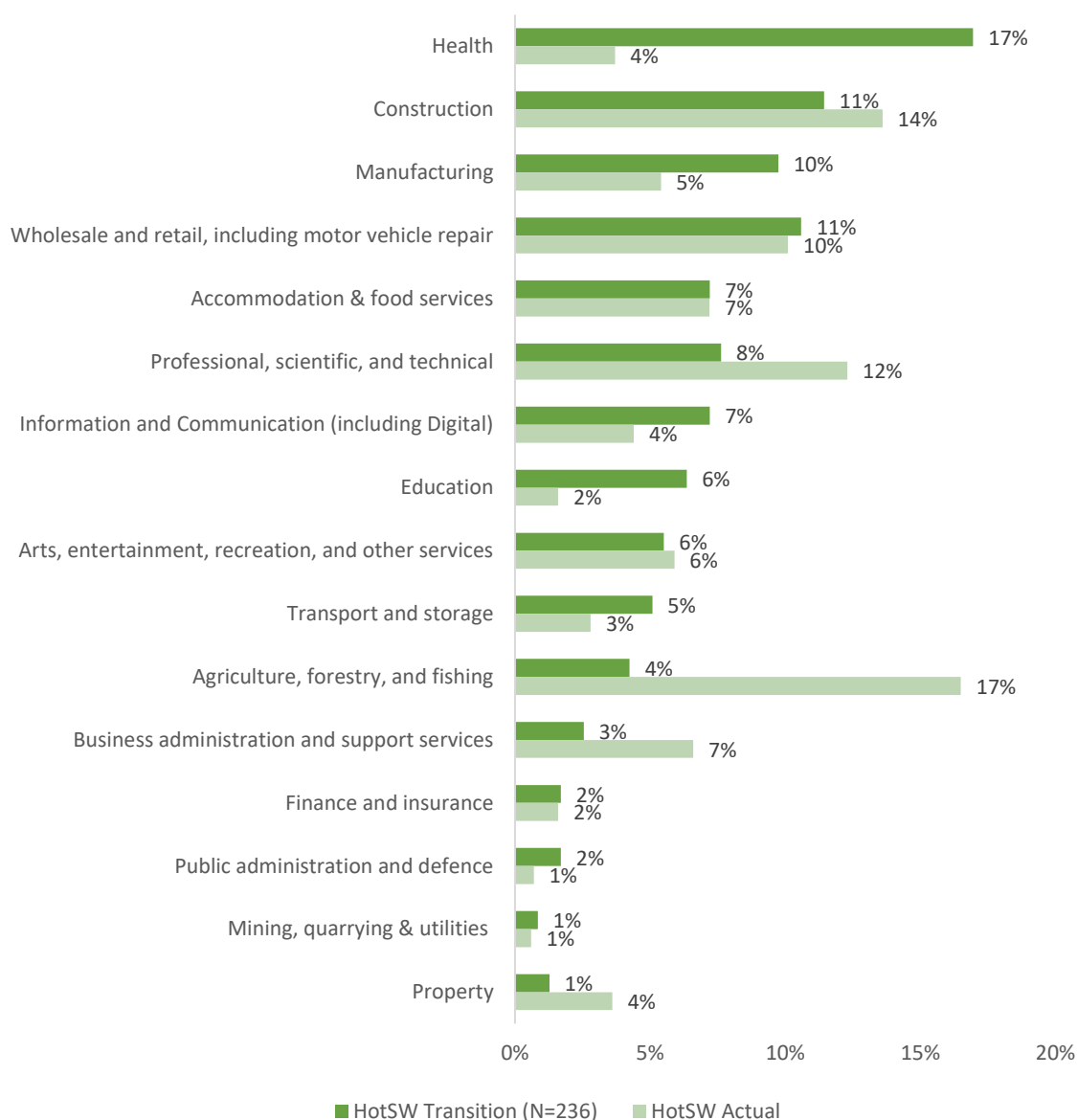
The business respondents ranged in size, from micro firms with 2 employees, to medium sized firms with 250 employees. The average number of Full Time Equivalent employees was 38 across the Transition area. Thirty per cent of the respondents were micro, 42 per cent were small and the remaining 28 per cent medium. Proportionately, micro firms represent 89 per cent of businesses in the Heart of the South West LEP, however, the survey was targeted at the slightly larger organisations who were more likely to have training needs.

The businesses surveyed were fairly representative of most sectors, though there were some industries that formed a greater or lesser part of the sample than the actual figures. In the Heart of the South West, more businesses from the Health, Manufacturing and Education sectors responded to the survey, compared to the official numbers.<sup>4</sup> Proportionately fewer businesses from the Agriculture, Business Administration, and Professional Services sectors responded to the survey than are present in the economy (as shown in figure 2.1). Agriculture is likely due to employment size with a high proportion of self-employment in the sector.

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<sup>4</sup> UK Business Counts from Inter-Departmental Business Register, ONS, 2019

**Figure 2.1: Proportion of business respondents by sector for HotSW and Transition area compared to published data for the HotSW<sup>5</sup>**



The survey looked to capture information on the Energy and Engineering sectors, reflecting their priority within the Heart of the South West LEP. Of the surveyed businesses, 20 per cent reported they were associated with the Energy sector and 30 per cent with the Engineering sector in the Transition area.

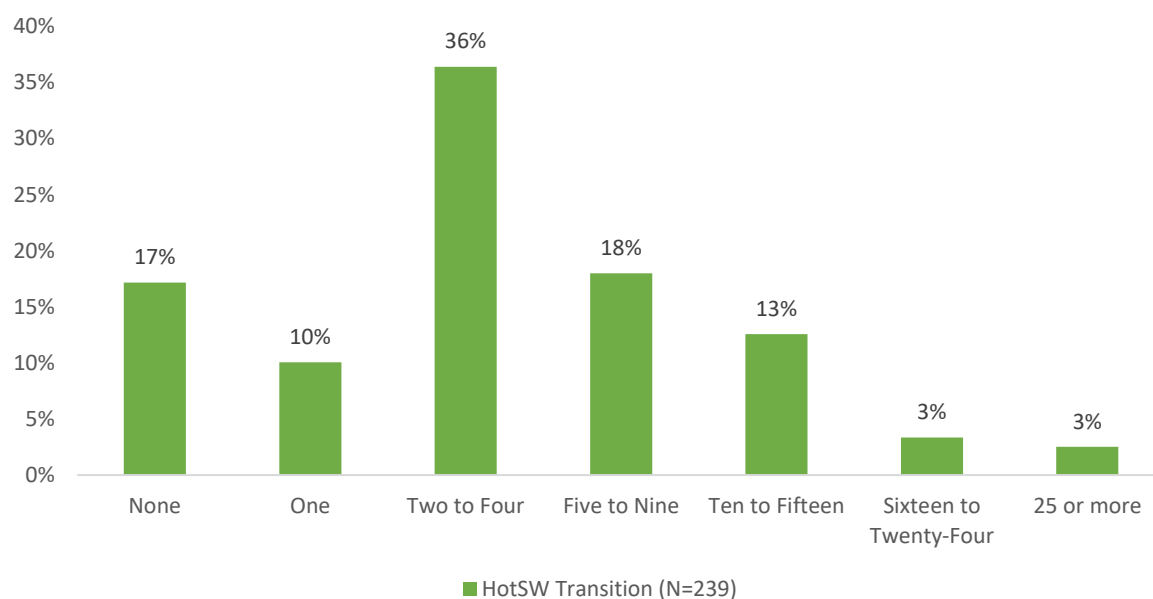
<sup>5</sup> UK Business Counts, Interdepartmental Business Register, ONS, 2019



## 2.2 Vacancies

In the past 12 months, respondent businesses to the survey in the Transition area reported on average 5.3 vacancies. The largest proportion of businesses reported between two and four vacancies, at 36 per cent in the Transition area (see figure 2.2). Seventeen per cent of businesses in the Transition area reported no vacancies in the last 12 months, though this may be influenced by the larger size distribution of the businesses.

**Figure 2.2: Businesses with vacancies in the last 12 months, by number of vacancies**



In the Transition area, 83 per cent of businesses surveyed reported a vacancy in the last 12 months. In the 2017 Workforce Skills Survey (WSS) for Devon County Council,<sup>6</sup> this figure was 68 per cent, suggesting an increase in the number of vacancies in the Transition area.

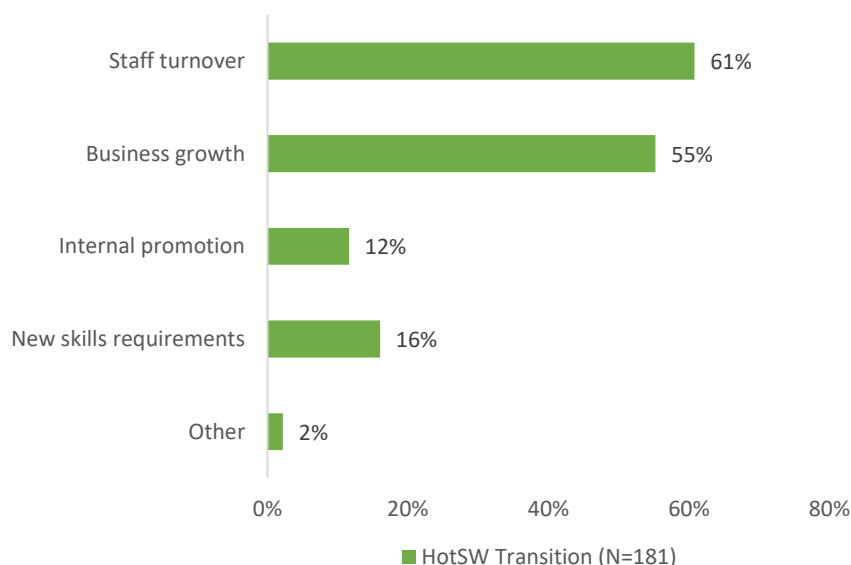
### 2.2.1 Reasons for vacancies

For most of the surveyed businesses, the reasons for the vacancies were staff turnover and business growth (as shown in figure 2.3). In 14 per cent of the Transition area businesses, the requirement for new skills drove the recruitment.

These results are broadly in line with those of the 2017 Devon WSS, though staff turnover was reportedly higher in 2017 (76 per cent) and business growth lower (46 per cent).

<sup>6</sup> Devon Workforce Skills Survey 2017, Wavehill on behalf of Devon County Council

Figure 2.3: Reason for vacancies in the business (multiple response)



### 2.2.2 Hard to fill vacancies

Of the respondent businesses who reported vacancies, 48 per cent in the Transition area reported that the vacancies were hard to fill. This equates to an incidence rate of hard to fill vacancies of 39 per cent of all businesses in the Transition area. The Devon WSS shows that hard to fill vacancies were reported by 34 per cent of businesses, again signalling a rise since 2017. Assuming all the vacancies reported by businesses stating they had hard to fill vacancies in this research, were hard to fill, the density of hard to fill vacancies is 55 per cent of all vacancies in the Transition area. This is lower than the figures in the Devon WSS which shows the hard to fill vacancy density was 68 per cent in 2017.

Within the Heart of the South West the proportions of businesses reporting hard to fill vacancies were similar across those firms associated with the Energy or Engineering sectors. This was also the case with results in the Transition area, though sample numbers are low.

For most respondent businesses, the reason the vacancies were hard to fill was due to the low number of applicants with the required skills, reported by 52 per cent of respondents (see figure 2.4). A low number of applicants generally was also reported by a large proportion of respondents (41 per cent in the Transition area).

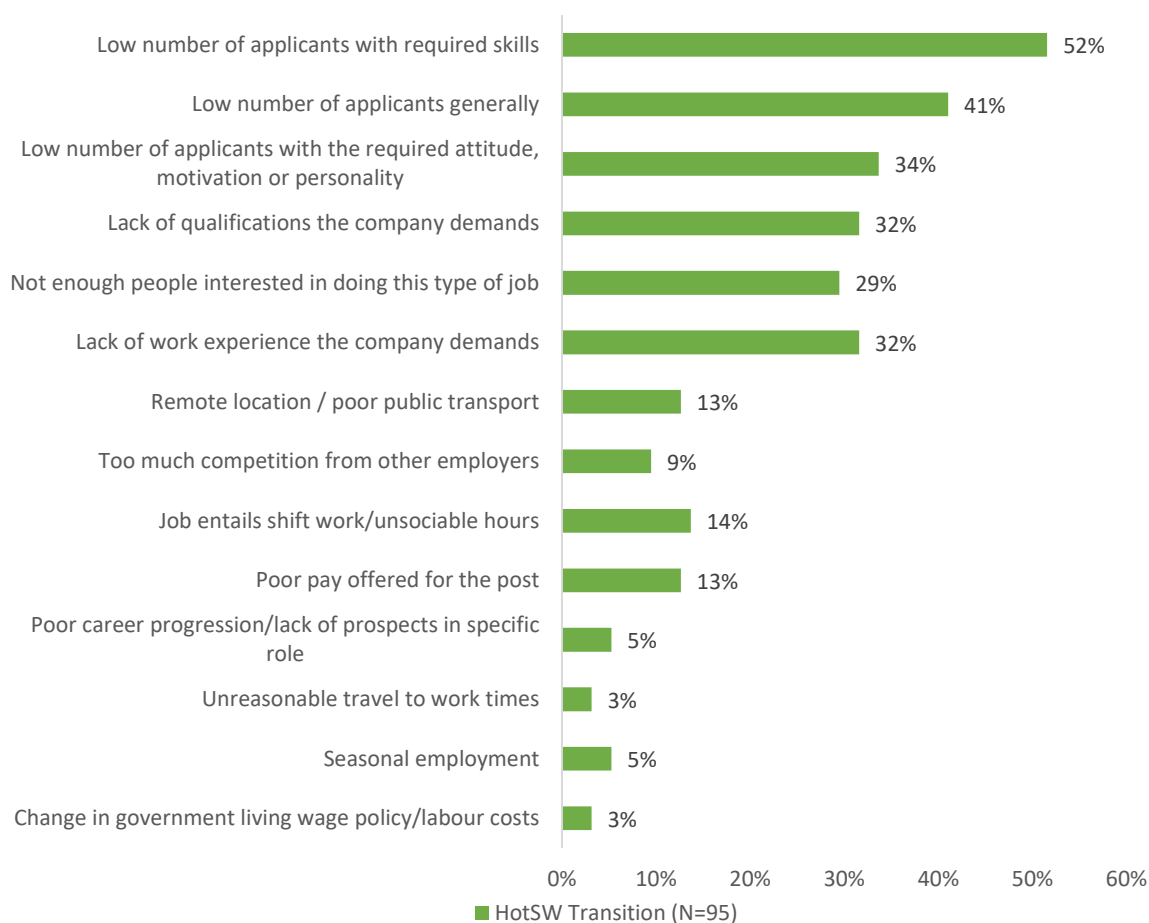
These findings would suggest that a shortage of available labour exists in the Transition area and this is leading to hard to fill vacancies which are being compounded by skills shortages.

Cross tabulating these survey results by occupation reveals that a low number of applicants with required skills was most common reason among vacancies for higher skilled occupations.

Thirty-one per cent of chief executive level vacancies reported a low number of applicants with the required skills as did 22 per cent of skilled trade occupations in the Transition area. By contrast, 10 per cent of sales and customer service vacancies reported a low number of applicants with the required skills and instead 12 per cent reported each a low number of applicants with the right attitude, remote location and lack of work experience. This was similar with process occupations where reasons for hard to fill vacancies was spread among not enough people interested in doing this type of job (15 per cent), low number of applicants with the right attitude (10 per cent) and lack of work experience the company demands (13 per cent).

Other issues such as the lack of work experience and qualifications was also reported by a third of respondent businesses in the Transition area. These findings have a similar base in the level of training and exposure, individuals in the labour market have had to develop the necessary skills. Resolving such challenges through good training and methods to provide work experience is a greater opportunity, compared to elements such as job location, hours and pay which are other reasons for hard to fill vacancies.

**Figure 2.4: Reasons for hard to fill vacancies (multiple response)**



The respondents reported that the occupations of the vacancies were varied, though over a quarter of businesses said hard to fill vacancies were in skilled trades and professional occupations. Almost a quarter of businesses reported technical and associate professional occupations were also hard to fill, and a fifth reported sales and customer service roles were hard to fill. These occupations are typically higher skilled and highly qualified which, taken alongside the results presented in figure 2.4 above, suggests that higher skills are a barrier.

### 2.2.3 Skills lacking among hard to fill vacancies

The proportion of surveyed businesses reporting vacancies due to availability of skills, or skills shortage vacancies, in the Transition area is 20 per cent. Density of skill shortage vacancies as a proportion of all businesses reporting vacancies in the Transition area it accounts for 31 per cent.

When asked what skills were lacking among the applicants, the most frequently reported by respondent businesses to the survey in the Transition area was technical skills specific to the sector or role (see figure 2.5). Digital skills were reported as lacking by 11 per cent of businesses in the Transition area.

**Figure 2.5: Skills lacking among applicants (multiple response)**



When asked to describe the technical skills that were lacking, the coded responses suggested that 49 per cent were job specific in the Transition area (see figure 2.6). These covered a range of skill areas, sectors and disciplines:

- Chefs and caterers
- Basic construction or landscaping
- Skilled construction such as electricians, carpenters, and plasterers
- Textile and pattern cutting
- Lighting and audio-visual technicians
- Aircraft engineers
- Plant operatives
- Creative industry skills including 3D printing and Fablab

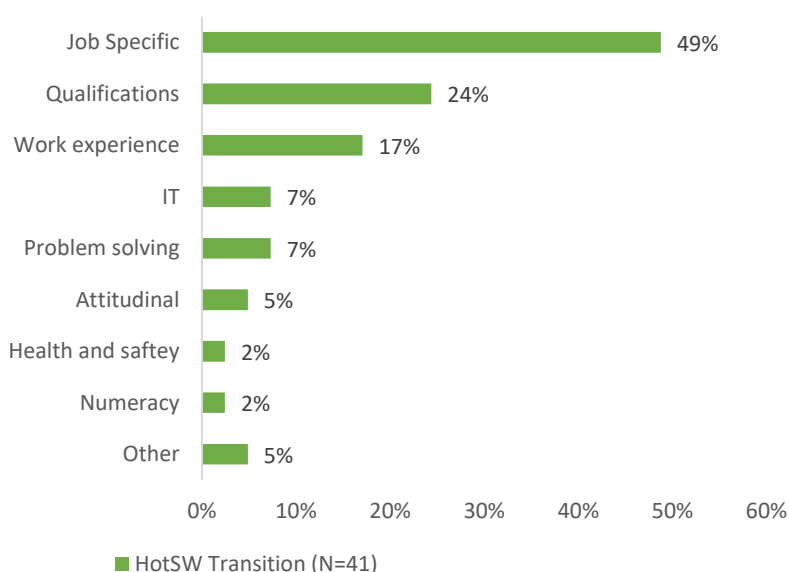
Almost a quarter of businesses in the Transition area reported that it was a lack of technical qualifications that meant applicants did not have the technical skills. Examples of these were:

- NVQ 2 Carers
- NVQ 3 in Healthcare
- Professional CIOB qualifications
- Construction apprenticeships

As suggested by the above, the job specific technical skills and qualifications for technical skills lacking among applicants are mainly in the construction, health, food and drink and art sectors in the Transition area.

Seven per cent suggested that it was IT skills that was leading to a lack of technical skills. It should be noted that the sample for these calculations is small.

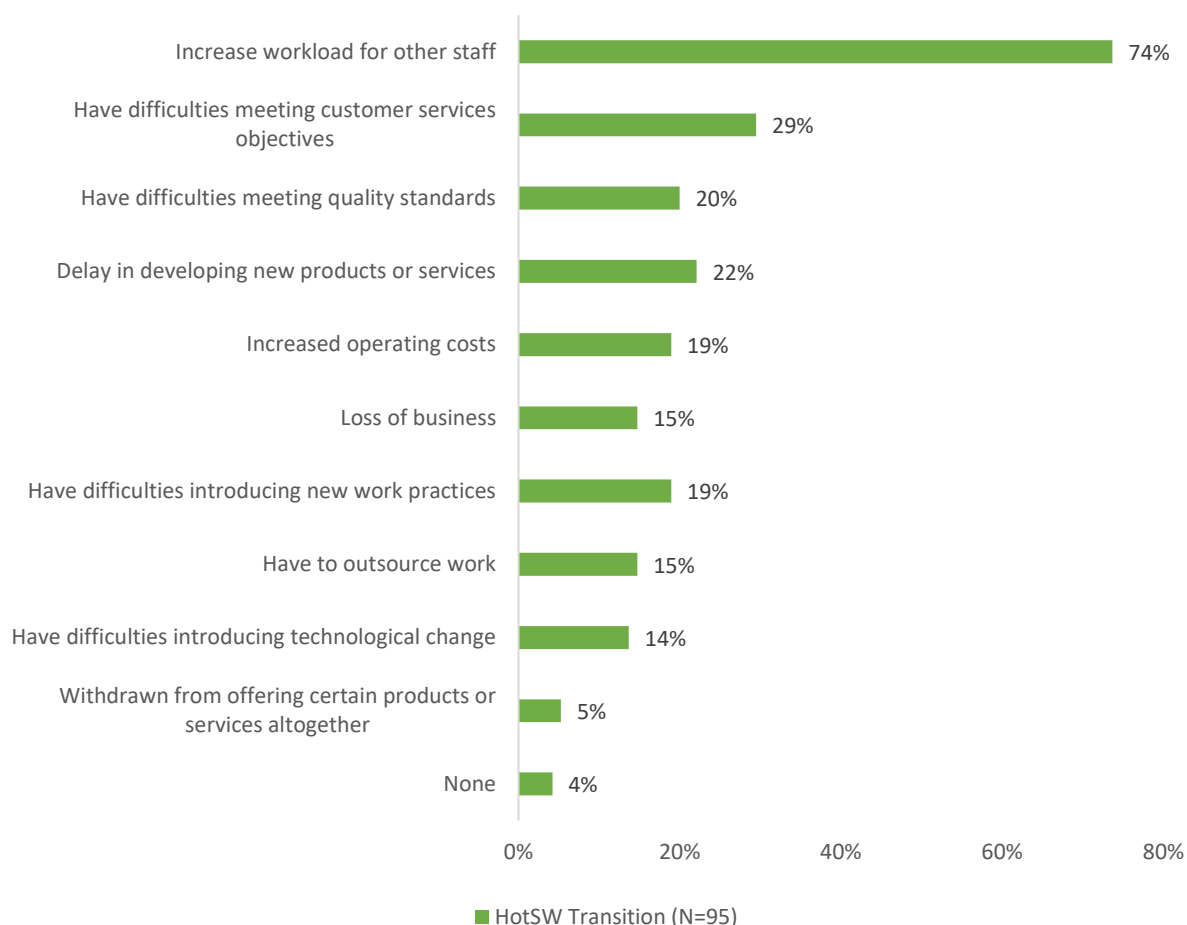
Figure 2.6: Coded descriptions of technical skills lacking among applicants



## 2.2.4 Impacts of hard to fill vacancies

For the majority of surveyed businesses in the Transition area, the impact has been to increase the workload of other staff in the organisation (see figure 2.7). The figures here though are lower than those in the ESS in which 87 per cent of businesses reported increased workload for staff in the Heart of the South West in 2017 (84 per cent in Devon – Plymouth and Torbay figures are not available). Fourteen per cent of businesses report that the failure to recruit is leading to difficulties in introducing technological change and difficulties introducing new work practices, likely inhibiting innovation and productivity. For 15 per cent of businesses in the Transition area, a loss of business is the impact of the failure to recruit. The ESS shows this was 28 per cent in Devon in 2017 (the Plymouth and Torbay figures are not available) and 38 per cent in the Heart of the South West.

**Figure 2.7: Impacts of hard to fill vacancies on businesses (multiple response)**



## 2.2.5 Overcoming difficulties in recruitment

In response to the challenges posed by hard to fill vacancies, the respondents provided a number of measures they were taking (figure 2.8). In the Transition area, many businesses said they were being prepared to offer training to less qualified recruits (42 per cent) and increasing training to the existing workforce (35 per cent). Some 44 per cent of businesses were using new recruitment methods or channels to overcome their recruitment difficulties.

In comparison, the ESS shows that offering training to less qualified recruits was undertaken by a lower proportion of businesses in 2017; nine per cent in Devon (Torbay and Plymouth are not available) and eight per cent in the Heart of the South West. Using new recruitment methods was reported by 33 per cent of businesses in both the Heart of the South West and in Devon (Torbay and Plymouth are not available) in the ESS in response to overcome recruitment difficulties for hard to fill vacancies. This is below the findings of this research, potentially suggesting change the since 2017.

Additionally, a greater proportion of businesses in response to this survey stated they were increasing training to their existing workforce compared to the ESS; 35 per cent in the Transition area vs. six per cent in the ESS for both Devon (Torbay and Plymouth are not available) and the Heart of the South West. This preparedness to offer training is a continued theme explored in the next section.

**Figure 2.8: How businesses are overcoming the recruitment difficulties (multiple response)**



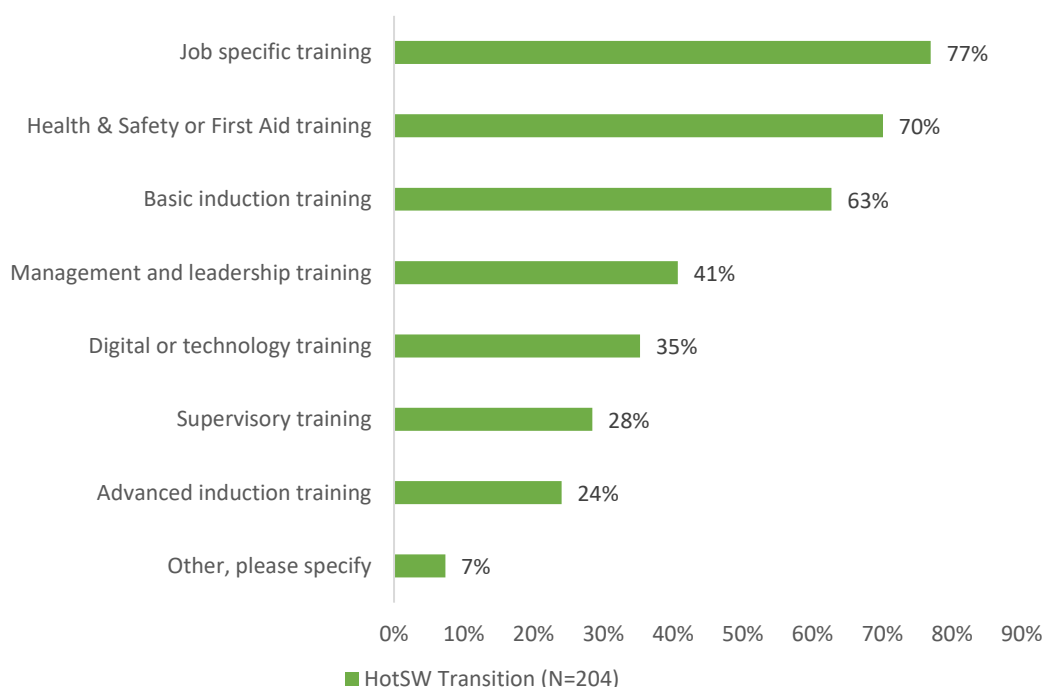
## 2.3 Training

A little over half of respondents had a training budget in the Transition area (52 per cent). This is higher than the ESS responses in 2017 which suggest 36 per cent of businesses have a budget for training across England. The proportion of businesses with a training budget increases with the size of the business in the ESS and the same occurs in this analysis. Cross tabulating the results shows that 46 per cent of medium businesses in the Transition area have a training budget compared to 20 per cent of micro businesses.

Within the Transition area, 84 per cent of survey respondents reported that their staff had undergone some form of training in the last 12 months. This is greater than the figures in the 2017 ESS where 70 per cent of businesses had provided training to their staff in the last 12 months in the Heart of the South West and 69 per cent in the Transition area. The results from this survey are also higher than those in the Devon WSS which were 78 per cent in 2017.

For most respondent businesses (77 per cent in the Transition area) the training provided was job specific (see figure 2.9). Some 70 per cent of respondent businesses in the Transition area had also undertaken health and safety or first aid training. Digital or technology training was provided to staff in just over one-third of Transition area businesses in the last 12 months. Other training providing was listed as welfare, CPD, process and food hygiene and production. The Devon WSS shows that in 2017 91 per cent of businesses had undertaken job specific training with their staff in the past 12 months, above the findings in this latest research.

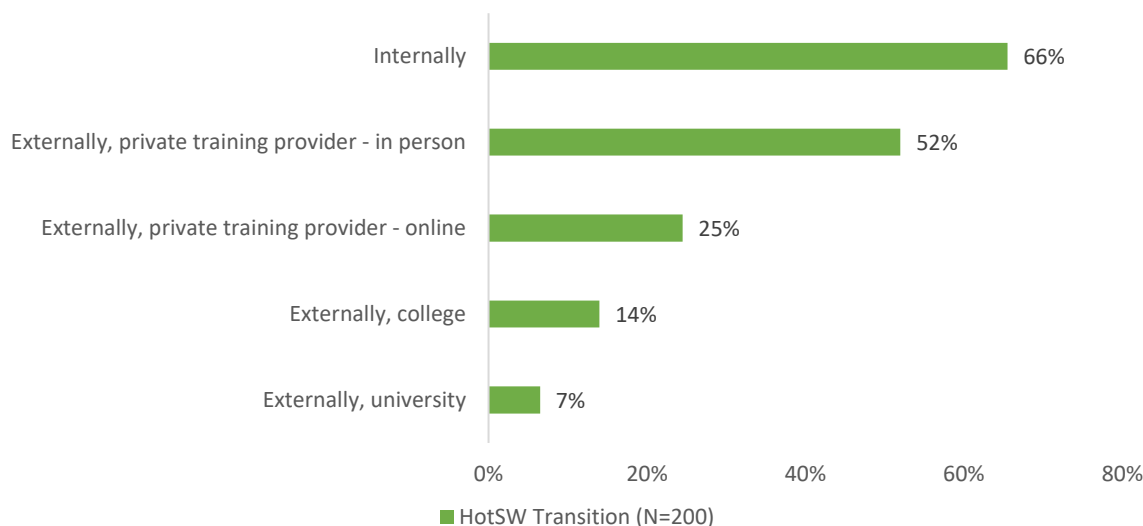
**Figure 2.9: Types of training provided for staff in the past 12 months (multiple response)**





Two-thirds of respondent businesses in the Transition area provided training internally and over half used face to face external training (52 per cent). A quarter also used external online resources to provide training for their staff. Smaller proportions of businesses used academic bodies to provide their training (see figure 2.10).

Figure 2.10: Who provides the training? (multiple response)



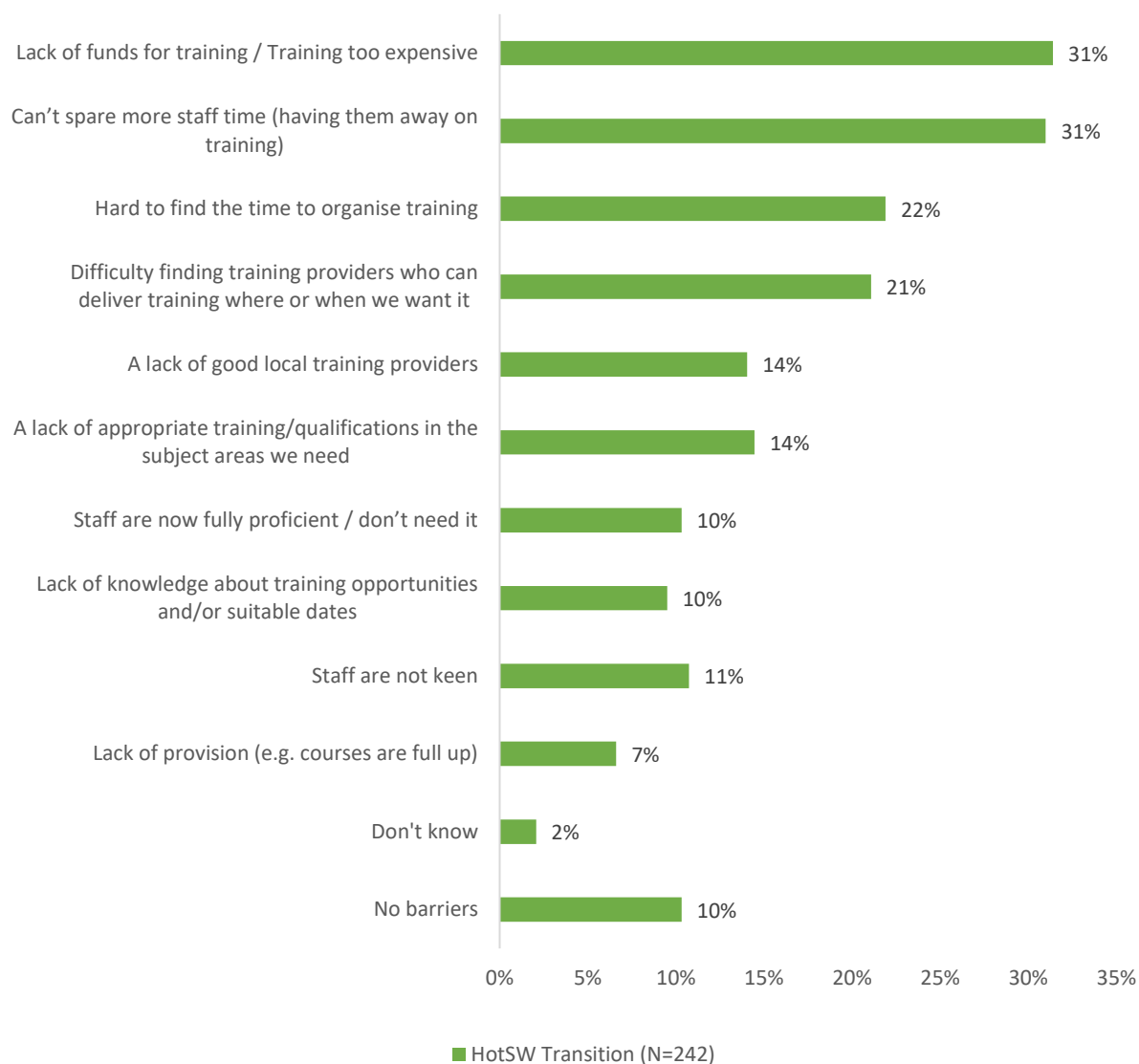
There were over 200 training providers listed as used by the respondents across the Heart of the South West and 150 in the Transition area. Many of the training providers were consequently unique to the respondent businesses and specific to their sector. Plymouth University, SSG, Petroc and the University of Exeter were referenced more frequently, by at least eight respondents each (a full list can be found in the Appendix).

The survey recorded the average levels of satisfaction for the training providers was 4.52 out of 5 in the Transition area. Sixty-three per cent of respondents in the Transition area said their training provision was 5 out of 5, and only eight per cent of businesses in the Transition area scored their training provider as 1, 2 or 3 out of 5.

Eighty-eight per cent of businesses in the Transition area allowed staff paid time off for training.

The challenges surveyed businesses face in providing training to current staff most frequently cited in the Transition area were cost of training (31 per cent) and not being able to spare staff time (31 per cent), see figure 2.11. These results are marginally above those in the 2017 Devon WSS where training being too expensive was a reported barrier among 24 per cent of respondents and not being able to spare staff time reported by 26 per cent of respondents. A smaller proportion reported that a lack of provision was a challenge (seven per cent), though more prevalent was the lack of appropriate training or qualifications (14 per cent), a lack of good local training providers (14 per cent) and lack of knowledge about training opportunities (10 per cent).

Figure 2.11: Challenges faced by businesses in providing training to staff (multiple response)



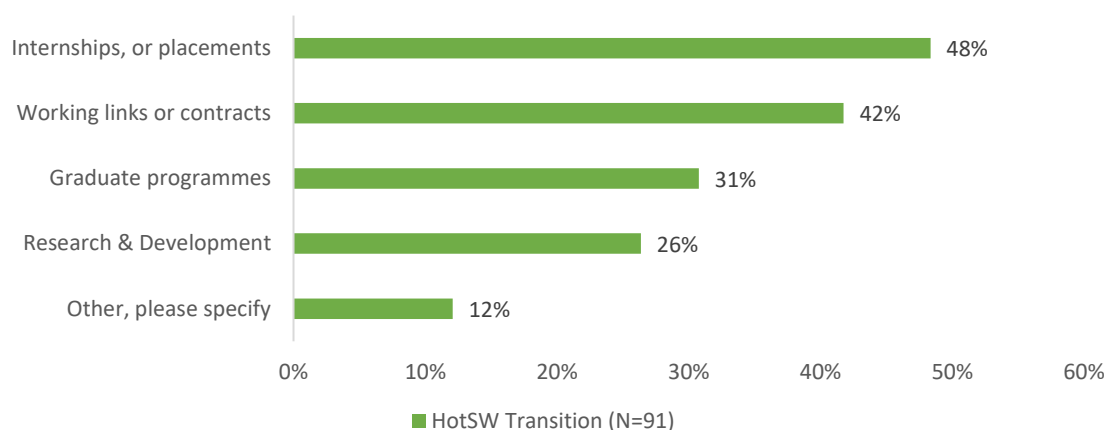
## 2.4 Relationship with training institutions

To investigate the extent businesses in the Heart of the South West engaged with training institutions beyond staff training, the survey asked if the businesses had any relationships with academic organisations, including universities, and schools and colleges, or with independent training providers. The results show that 82 per cent of businesses had some form of engagement of any kind with training providers.

## 2.4.1 Academia

Thirty-nine per cent of respondent businesses in the Transition area had some link to academic institutions (figure 2.12). Of these, 48 per cent in the Transition area offered internships or placements and 31 per cent had graduate programmes with such institutions. A large proportion (42 per cent) had working relationships with these academic institutions and of those who gave other responses, the most frequent response was for training.

**Figure 2.12: Links with academic institutions among businesses (multiple response)**

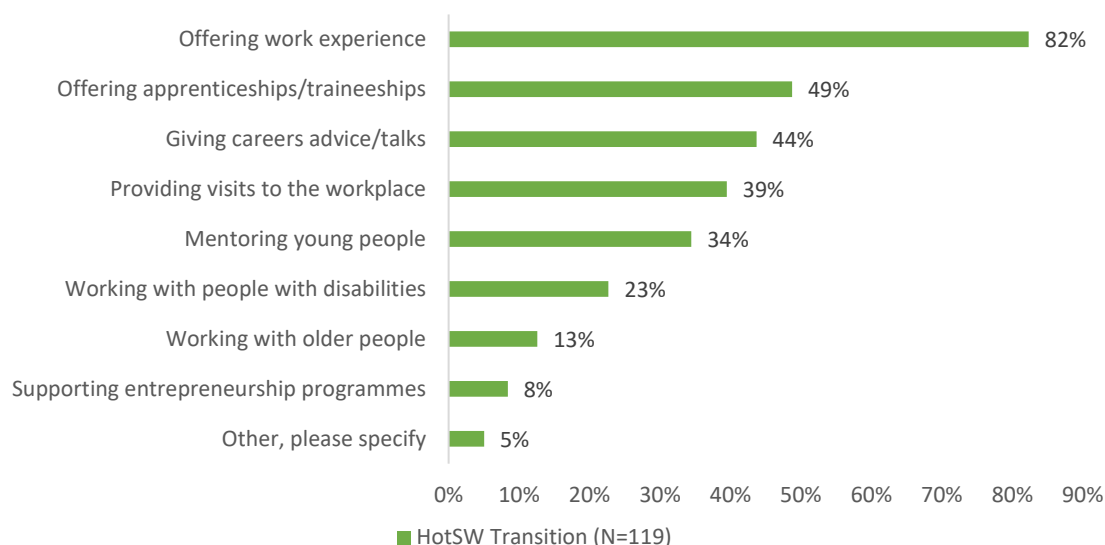


A higher proportion of respondents in the Heart of the South West who reported research and development engagement with academic institutions came from manufacturing (21 per cent) and the arts and entertainment (20 per cent) sectors. The responses for the Transition area are too few to conduct this analysis.

## 2.4.2 Schools and colleges

Half of the respondent businesses had links with schools or colleges in the Transition area (figure 2.13). For the majority of businesses this was to offer work experience, and nearly half also offered apprenticeship training in conjunction with such colleges.

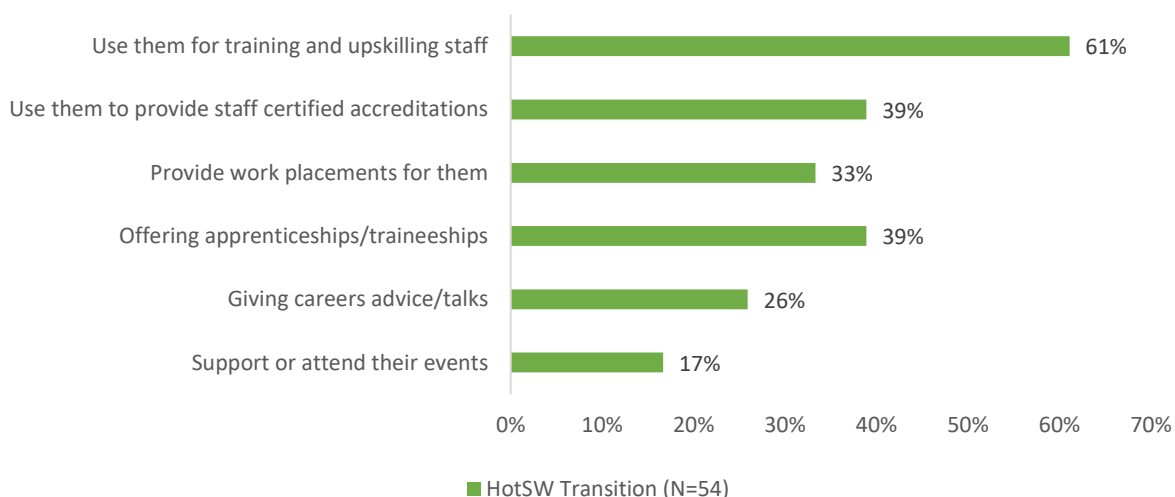
**Figure 2.13: Links with schools and colleges among businesses (multiple response)**



### 2.4.3 Independent training providers

Some 43 per cent of surveyed businesses had relationships with independent training providers in the Transition area (see figure 2.14). For most of the respondents this was to use them for training and upskilling staff (61 per cent). In the Transition area 39 per cent used independent training providers to provide staff with certified accreditations, and 39 per cent offered apprenticeships and training.

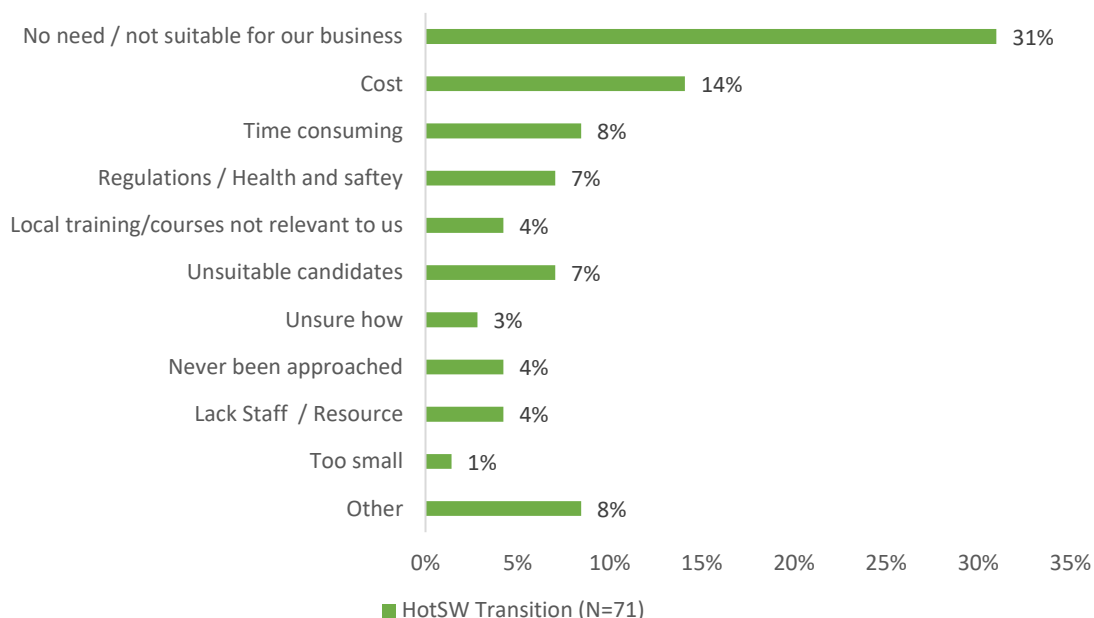
**Figure 2.14: Links with independent training providers among businesses (multiple response)**



## 2.4.4 Why do some businesses not engage with skills providers?

For the 18 per cent of surveyed businesses who do not engage with skills providers, the main reason was that there was no need, or it was not suitable for their business (shown in figure 2.15). Cost was also important factor for 14 per cent of the respondents in the Transition area.

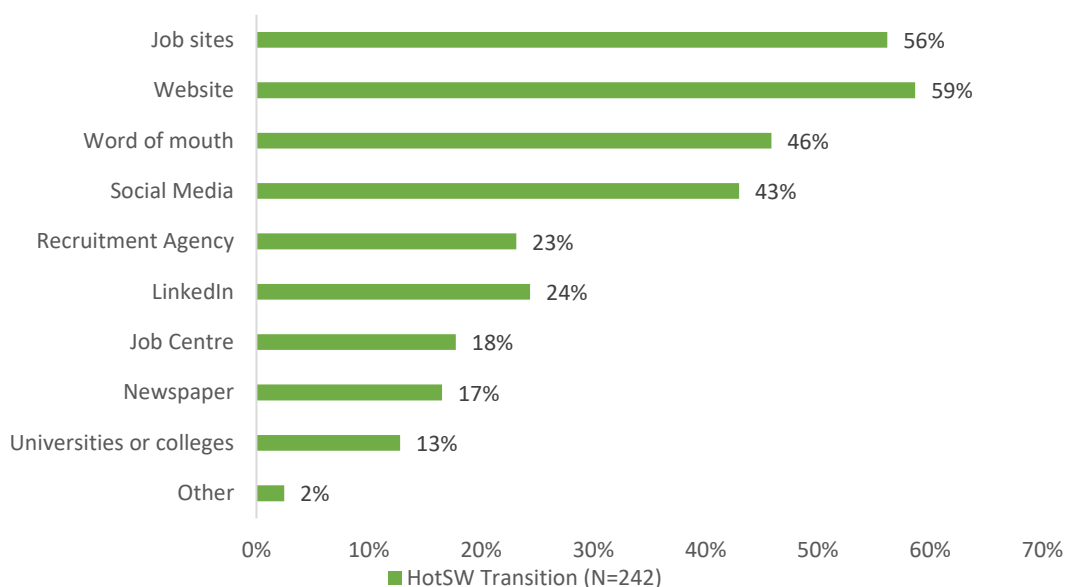
Figure 2.15: Why businesses do not engage with skills providers?



## 2.5 Recruitment

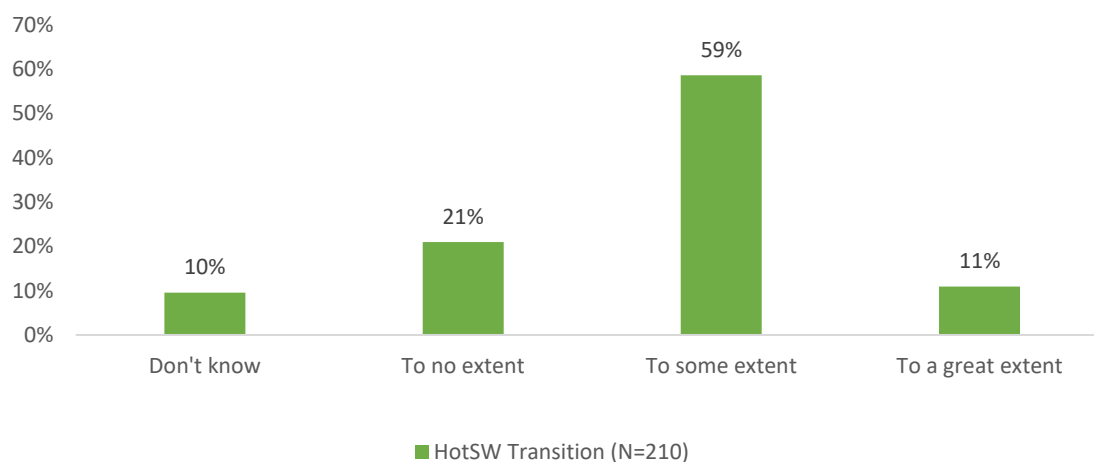
Most respondent businesses in the Transition area recruit using online job sites and their own website, though a large portion use word of mouth (46 per cent) and social media (43 per cent). A tenth recruit from university graduates and over a quarter use recruitment agencies (see figure 2.16).

**Figure 2.16: How does your organisation recruit? (multiple response)**



To understand why local businesses did not recruit more from universities or colleges, the survey asked those who did not recruit in this way if they had considered such recruitment. Forty-four per cent of respondent businesses in the Transition area had considered using universities or colleges as a means to recruit. A smaller proportion of these businesses thought that university graduates would be able to provide the skills necessary to their organisation to a great extent, with most suggesting they would be to some extent, provide some of the skills required (figure 2.17). This likely reflects that organisations have many sectoral and job specific skills that need to be trained and developed on the job, and do not necessarily come from degree programmes.

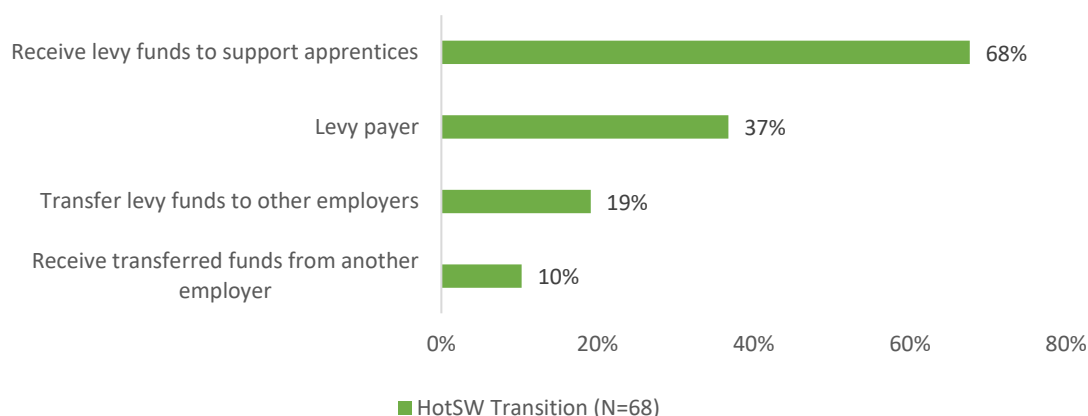
**Figure 2.17: The extent to which businesses feel that university graduates are able to provide the skills necessary to their organisation**



## 2.6 Apprenticeships

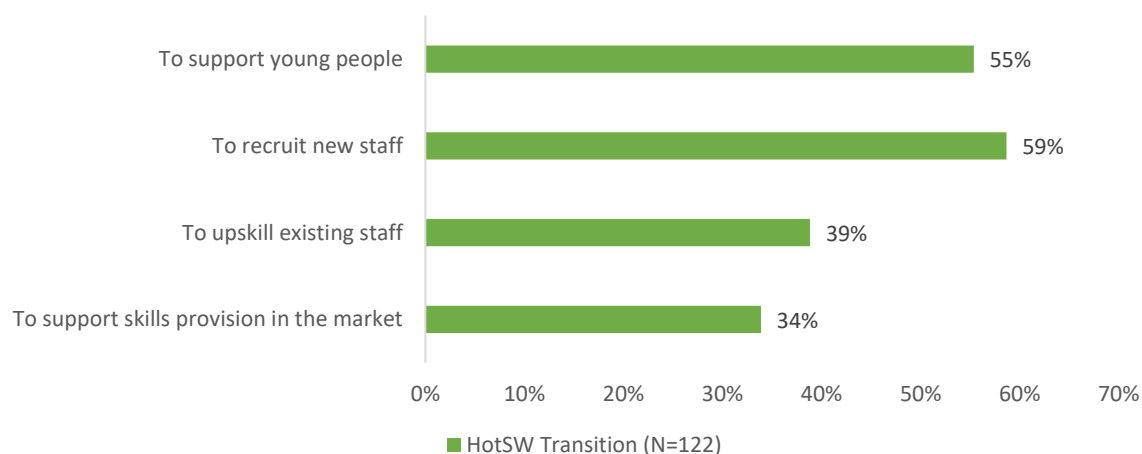
Thirty-nine per cent of surveyed businesses in the Transition area are involved in the apprenticeship levy in some way, either as recipients or contributors. For most of these businesses they receive levy funds to support apprentices, see figure 2.18.

**Figure 2.18: How organisations are involved with the apprenticeship levy (multiple response)**



Some 37 per cent of respondent businesses in the Transition area take on apprentices. For many of these businesses they take on apprentices to support young people (55 per cent) and to recruit (59 per cent), as shown in figure 2.19.

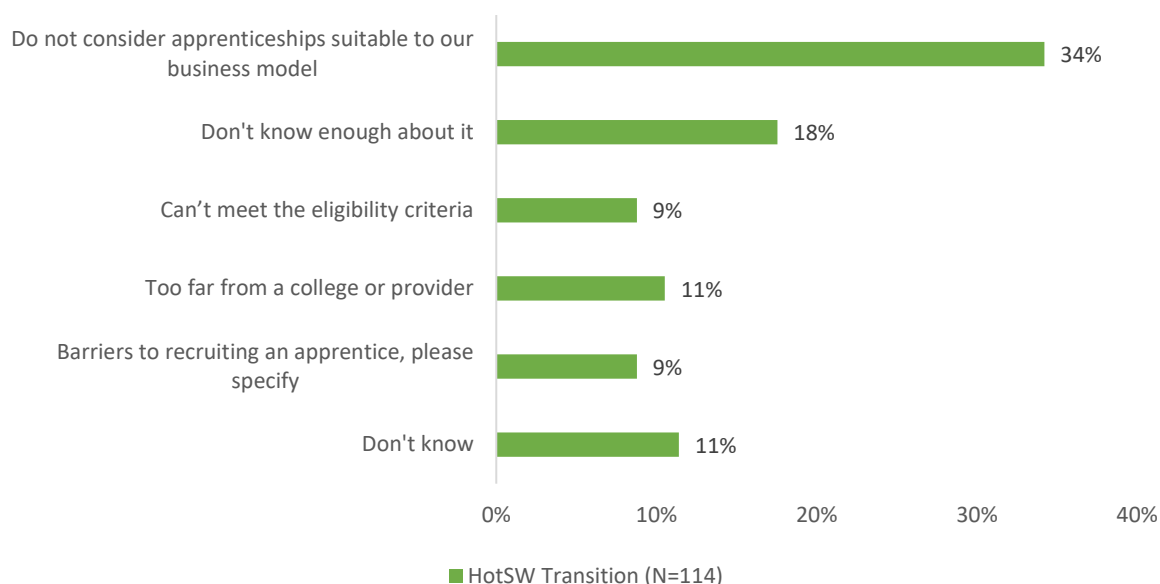
**Figure 2.19: Why do businesses take on apprentices? (multiple response)**



Those who gave other reasons were few (two per cent in the Transition area) and the responses were mixed, but training to organisations approach were most cited.

For surveyed businesses who did not take on apprentices, the main reason was they did not consider apprentices suitable for their business model. Eighteen per cent however, reported that they did not know enough about apprenticeships, potentially identifying an opportunity to meet skills gaps if such information could be provided (figure 2.20).

**Figure 2.20: Why do you not take on apprentices? (multiple response)**



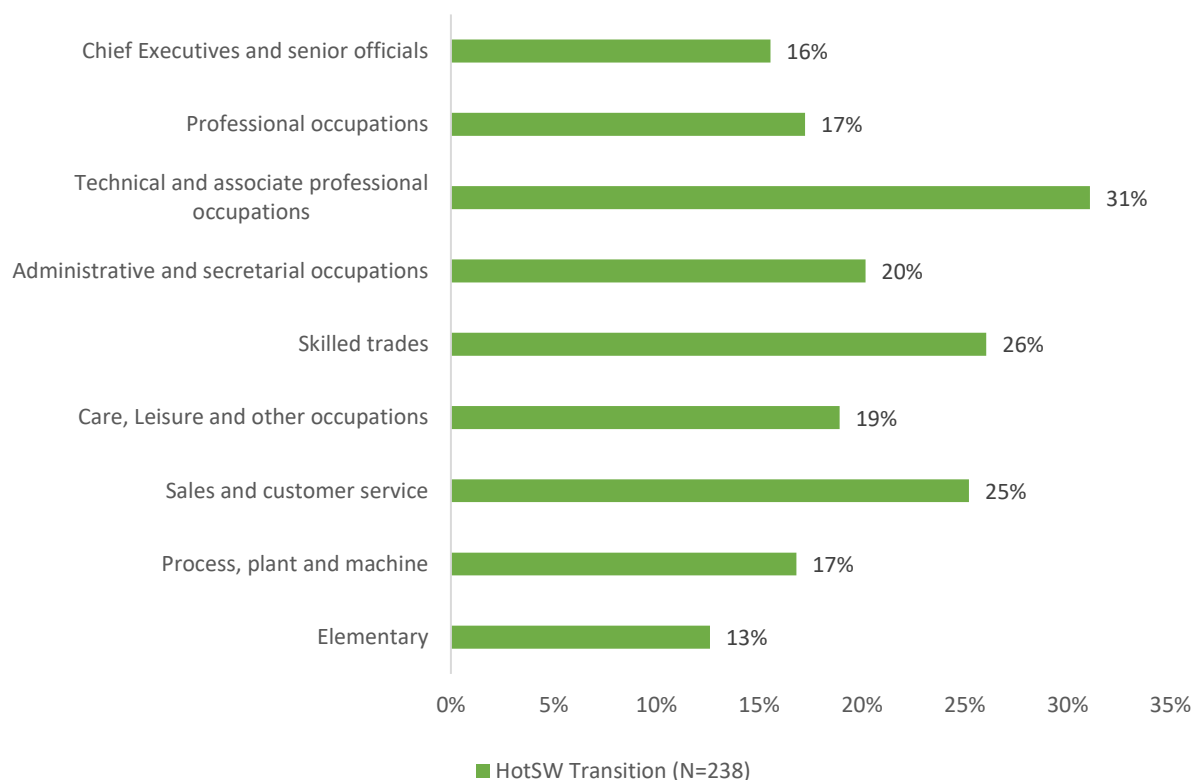
Of these businesses who did not take on apprentices, 33 per cent of respondents in the Heart of the South West said they would consider taking on apprentices in the future if there was additional support available, and a further 48 per cent said they would, depending on the requirements.

## 2.7 Technical and digital skills

The survey asked which occupational categories businesses felt were most likely to be affected by the need to acquire new skills. This was spread across various occupation areas though skilled trades, technical and associate professionals and sales and customer services were the highest (figure 2.21). This aligns with the earlier finding that technical skills were those most lacking from applicants to vacancies (section 2.2).

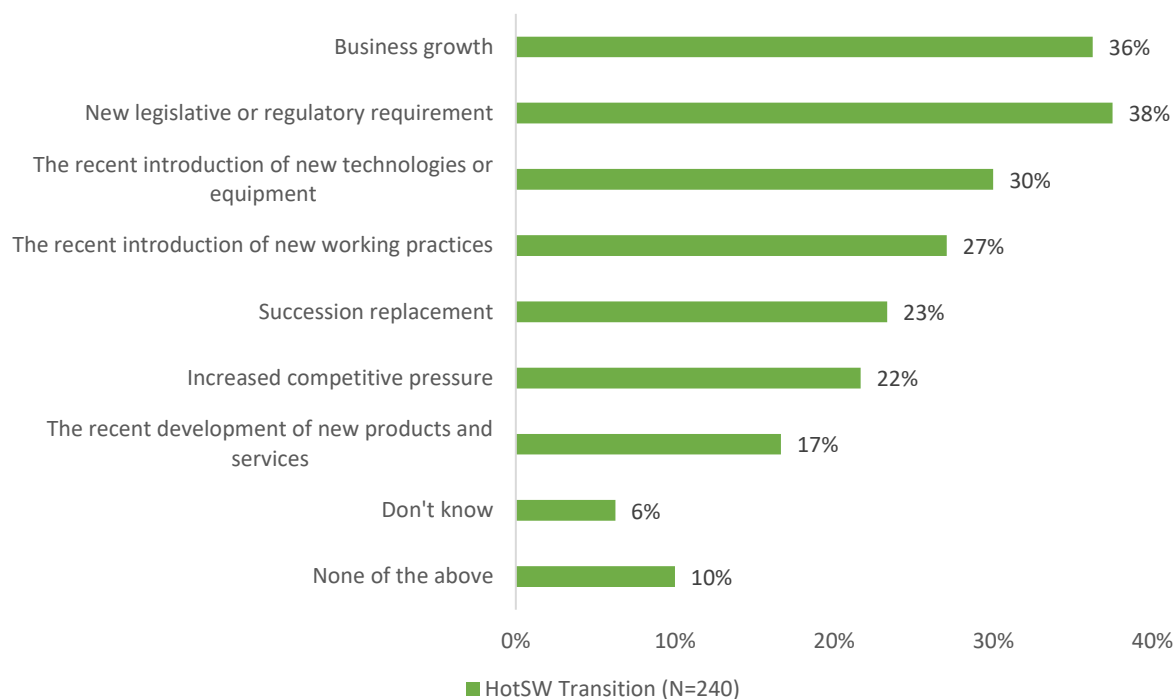


**Figure 2.21: Occupations most likely to be affected by the need to acquire new skills (multiple response)**



The reasons these occupations were going to be affected was fairly diverse across the respondents, though new legislative or regulatory requirement was the most frequently cited in the Transition area (38 per cent), as shown in figure 2.22. Business growth and the introduction of new technology or equipment was an important driver among 36 and 38 per cent of Transition businesses respectively. The latter potentially suggests an opportunity for training as a response to such technological development, especially in conjunction with section 2.22, on digital needs below.

**Figure 2.22: Main reason occupations will be affected by need to acquire new skills (multiple response)**



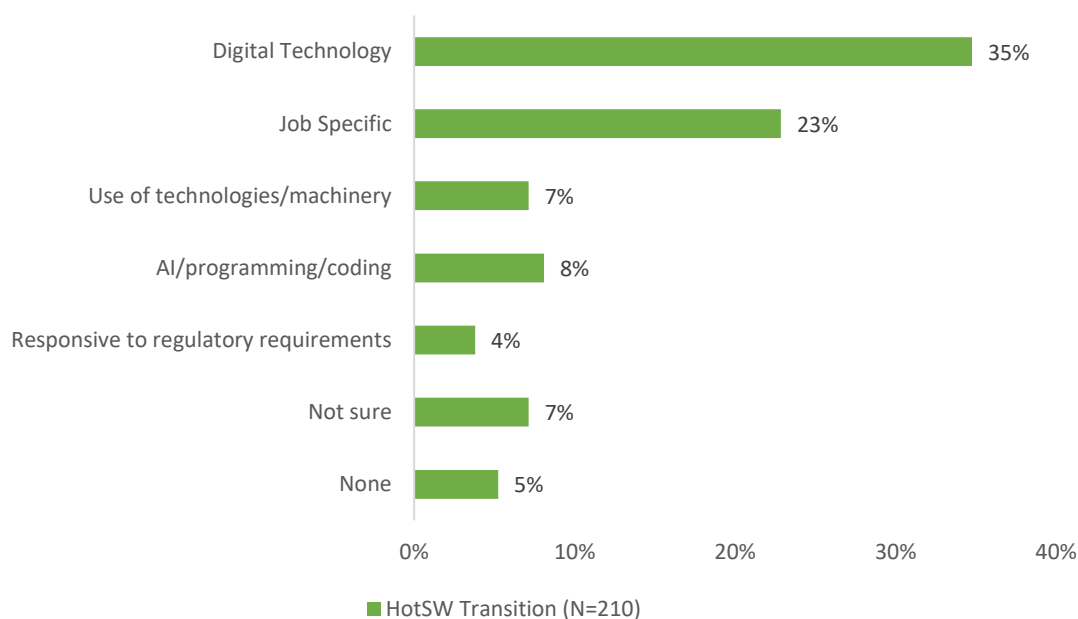
### 2.7.1 Required skills

The coded responses given by the surveyed businesses show that general digital technology skills were of most need in the next three years (figure 2.23). Over one-third of businesses reported a need for general digital skills in the Transition area. For many this related to the technology driven changes that are affecting most sectors and industries.

*“All staff will need to be able to use tablets to access the social care records system to record patient data, medication and a referral system for additional services. More staff will need training to help patients suffering from dementia.”*

*“Increased use of digital technology to improve effectiveness and efficiency, [while] enhancing products and customer service experiences.”*

**Figure 2.23: Technical skills needed by businesses in the next three years (figures <three per cent suppressed)**



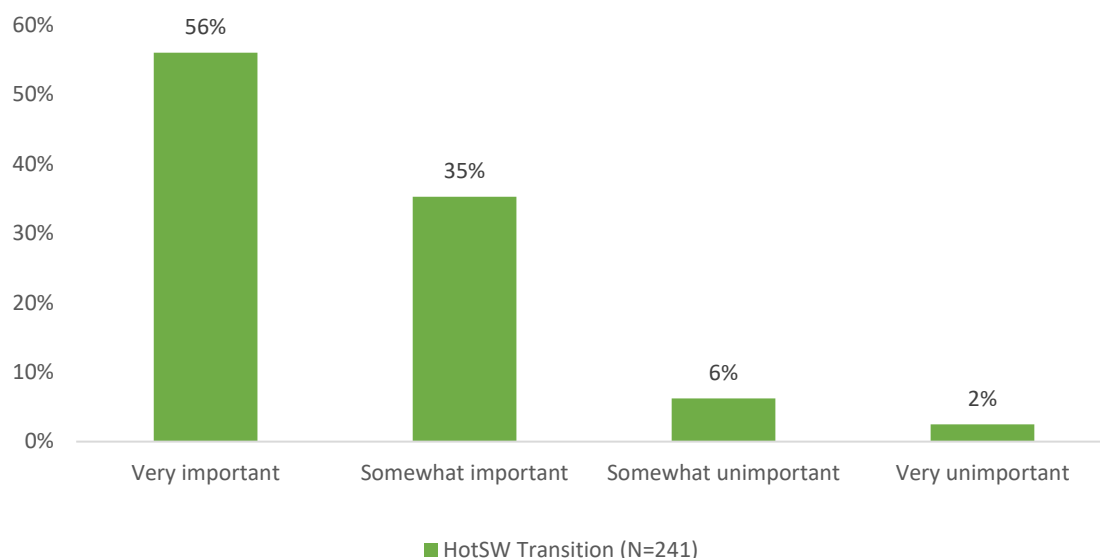
Eight per cent of respondent businesses also thought they would need higher level digital skills in the next three years such as artificial intelligence and programming. A wealth of research has shown such skills are important to raising productivity in the economy.<sup>7</sup>

Breaking these survey results down by those organisations associated with either the Engineering or the Energy sector reveals that there were similar requirements for digital skills. In the Transition area 38 per cent (17/45) of Energy associated businesses required digital skills, as did 33 per cent (23/69) of those associated with Engineering. Within the Transition area, 13 per cent (6/45) of businesses operating within the Energy sector required job specific technical skills. Twenty-five per cent (17/69) of Transition area firms associated with the Engineering sector needed job specific technical skills.

For the majority of respondent businesses in the Transition area (56 per cent) it was very important that employees had some basic knowledge of how to use digital technology (figure 2.24). Only a marginal two per cent of businesses in the Transition area felt it was very unimportant for their staff to have some knowledge of digital technology. This reflects how pervasive the digitalisation of the economy has become.

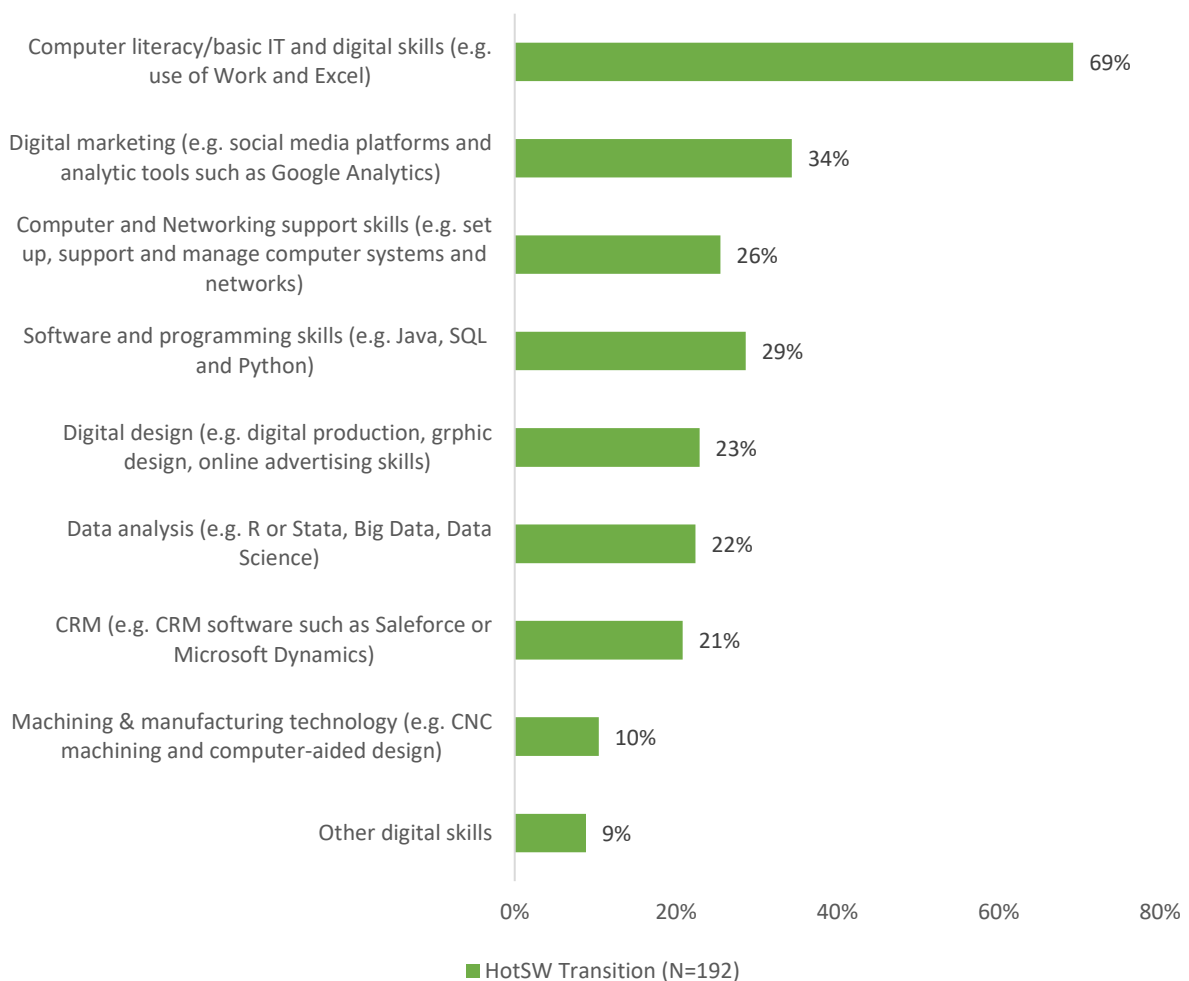
<sup>7</sup> The impact of training on productivity and wages: firm level evidence, Konings and Vanormelingen, Review of Economics and Statistics, 97 (2), May 2015

**Figure 2.24: Level of importance that employees have at least some basic knowledge of using digital technology**



Confirming the qualitative results provided above, when asked what digital skills needed improving within their organisation in the next three years, respondents mostly reported basic IT and computer skills. This was reported by 69 per cent of businesses in the Transition area. Other digital skills were more varied among respondents but as shown in figure 2.25 the responses to most categories were nonetheless important, mostly being reported by above one-fifth of businesses.

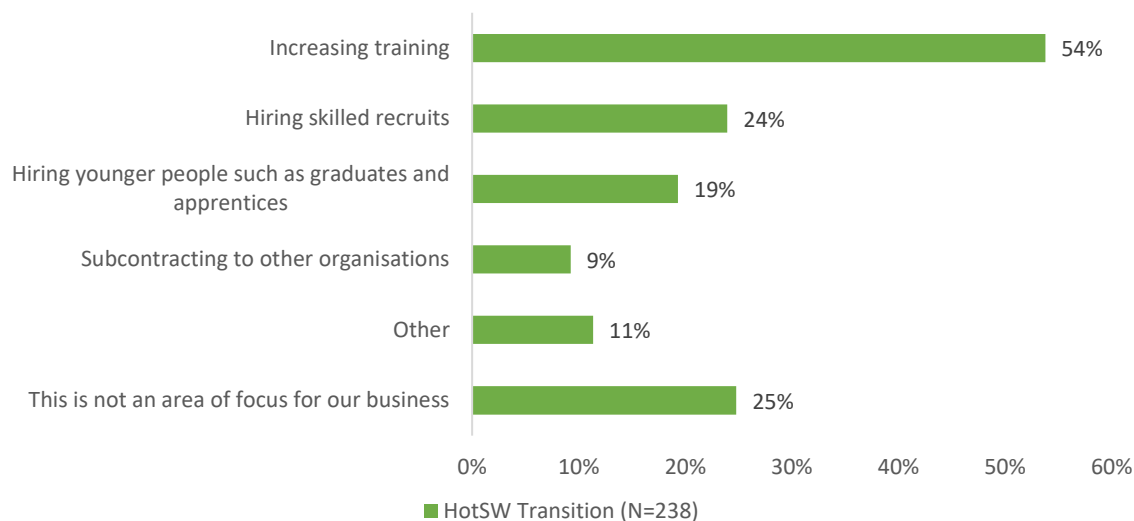
Figure 2.25: Which digital skills need improving over the next three years? (multiple response)



### 2.7.2 Response to digital skills needs

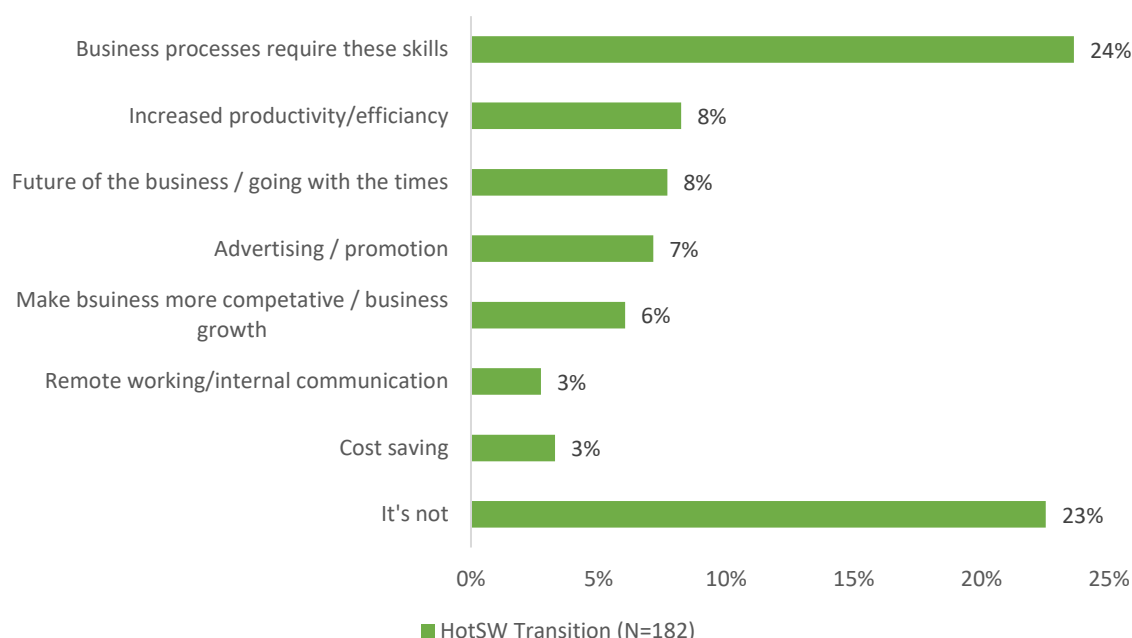
Most surveyed businesses in the Transition area (54 per cent) are increasing their training provision to respond to the digital needs of their staff (figure 2.26). Others are looking to hire skilled recruits, including younger people who may be more technologically skilled and aware. A quarter of businesses, however, reported that it was not an important focus of their business.

**Figure 2.26: How is your organisation responding to the digital skills needs of your staff? (multiple response)**



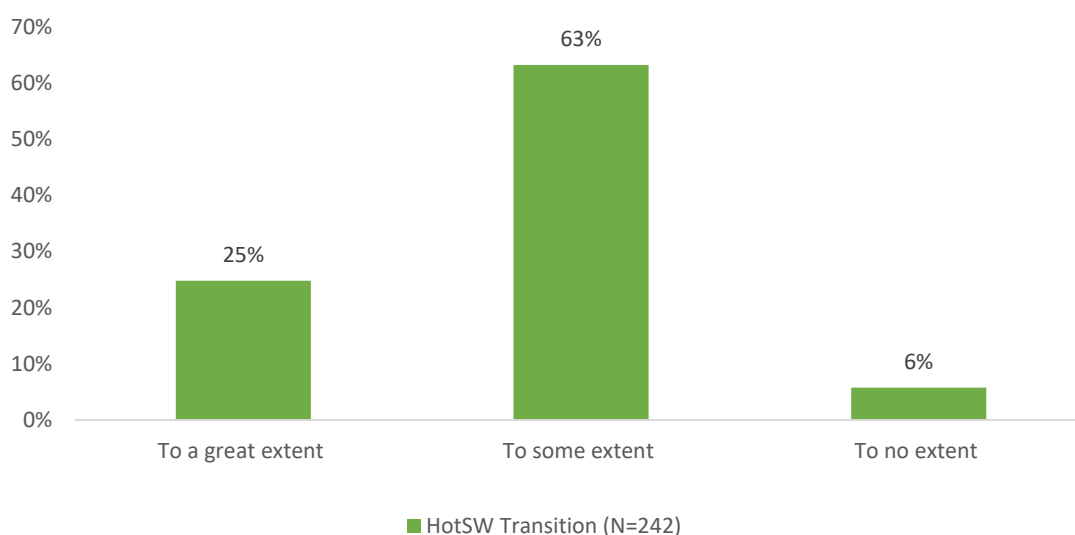
For approximately a quarter of respondent businesses in the Transition area, digital skills were important to their organisation because their business processes required such skills (figure 2.27). For eight per cent of businesses in the Transition area digitalisation was important to drive efficiency and eight per cent also reported it was the future of the business. Almost one-quarter of businesses reported that digitalisation was not important to their organisation.

**Figure 2.27: Coded descriptions of the way's digitalisation is important to surveyed businesses**



In the Transition area 25 per cent of surveyed businesses felt that, to a great extent, their organisation had sufficient skills to be prepared for increasing digitalisation in their industry over the next three years (figure 2.28). Most businesses felt to some extent they had sufficient skills and 11 per cent of Transition area businesses thought that to no extent they had the digital skills capacity to be prepared for this change.

**Figure 2.28: Extent businesses feel they have sufficient digital skills to be prepared for further digitalisation of their industry in the next three years**



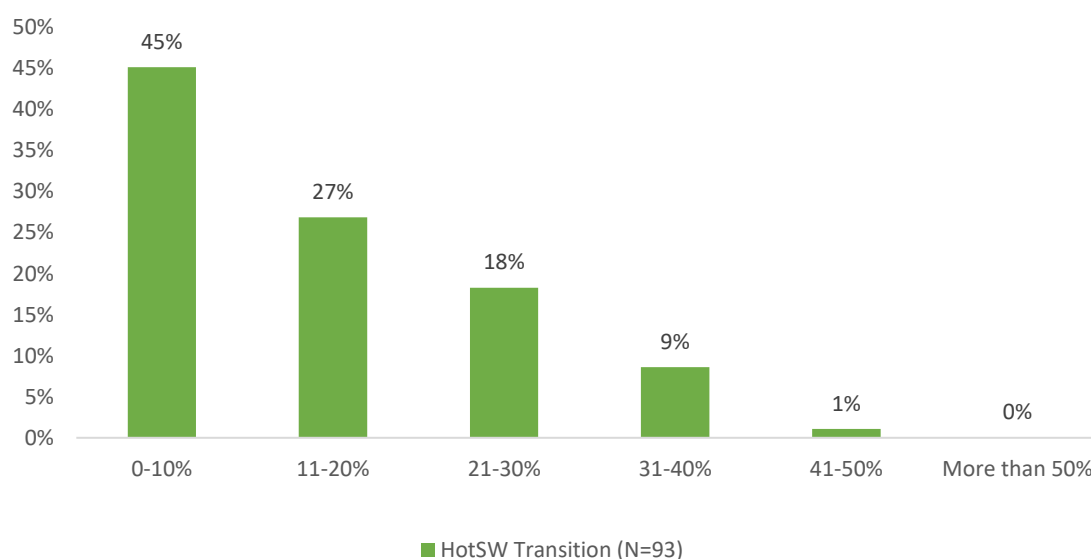
### 2.7.3 Investment in digital technology

To assess the extent to which the changing digital landscape is likely to shape skills needs, the survey asked businesses if they were making any investments in digital technology in the next two years. Forty-two per cent in the Transition area reported they were going to make such investments. Some 43 per cent thought they would not be investing, leaving 15 per cent who did not know whether they would be or not.

Of those businesses who did have plans to invest in digital technology in the next two years, 30 per cent in the Transition area felt that to a great extent they had sufficient digital skills to be prepared for the future digitalisation of their industry. These results were similar to the findings presented in section 2.7 above. The similarity was consistent among those businesses who were investing in digital technology in the next two years but felt they only had sufficient digital skills to be prepared for such digitalisation to some extent (65 per cent compared to 63 per cent) or to no extent (five per cent compared to six per cent). This would suggest that even those businesses that are investing in digital technology face the same challenges in digital skills.

To understand the scale of the investment the businesses were making in digital technology, the survey asked what this would represent as a proportion of turnover. For 45 per cent of businesses in the Transition area this was thought to be less than 10 per cent of turnover, though nine per cent did report that the investment was going to be between 30 and 40 per cent of turnover (figure 2.29).

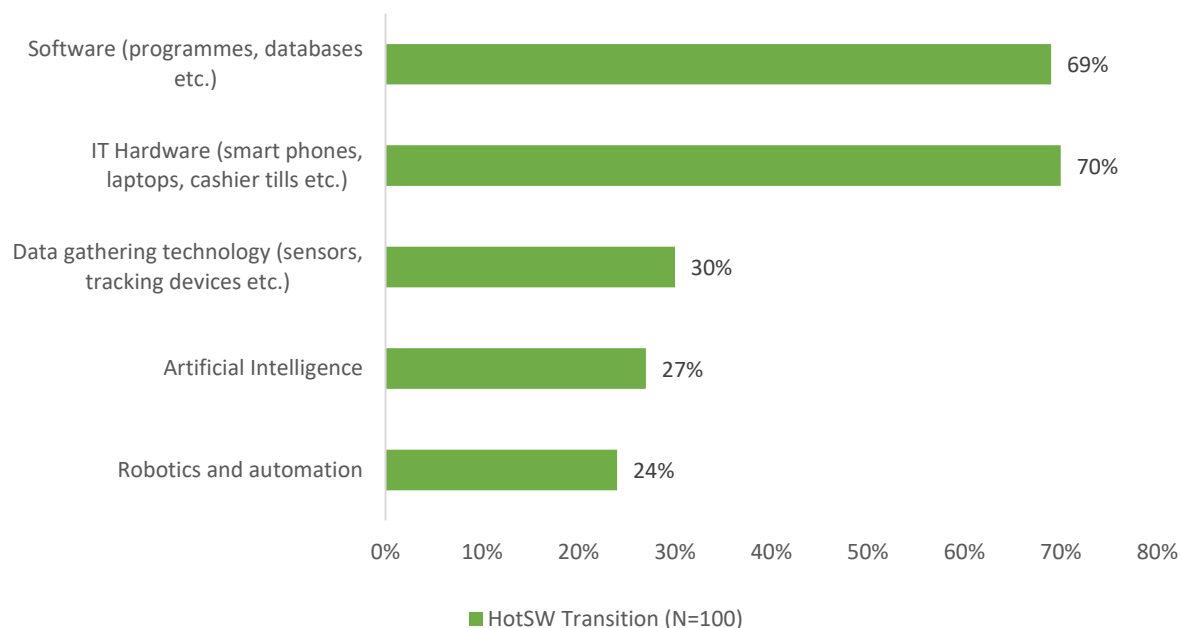
**Figure 2.29: Proportion of turnover to be invested in digital technology by businesses in the next two years**



Asked what digital technology the organisations would be investing in, for most respondents it was software programmes and IT hardware (see figure 2.30), reflecting those who were investing a lower proportion of turnover. A smaller proportion of businesses, reflecting those who were looking to invest greater proportions of turnover, were looking to purchase data gathering technologies, artificial intelligence, and robotics and automation.



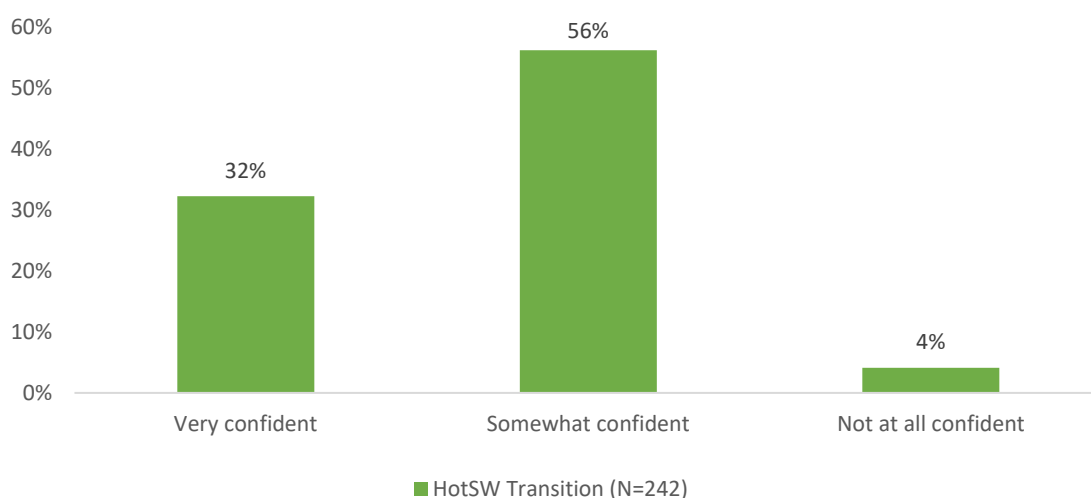
**Figure 2.30: Digital technologies being invested in by businesses (multiple response)**



To train their staff to the new technology investments, approximately 73 per cent of respondent businesses in the Transition area were going to conduct this internally. Forty-five per cent thought they would use external private training providers face-to-face, and a quarter thought they might be able to use online resources (responses were multiple choice). A quarter also thought they were going to use publicly funded training providers.

Confidence in the capacity of the surveyed businesses to be able to fill these future technology driven skills needs were fairly high, with approximately one-third of businesses in the Transition area reporting that they were very confident and over half were somewhat confident (figure 2.31). Four per cent of businesses in the Transition area felt they were not all confident about filling their future technology driven skills needs.

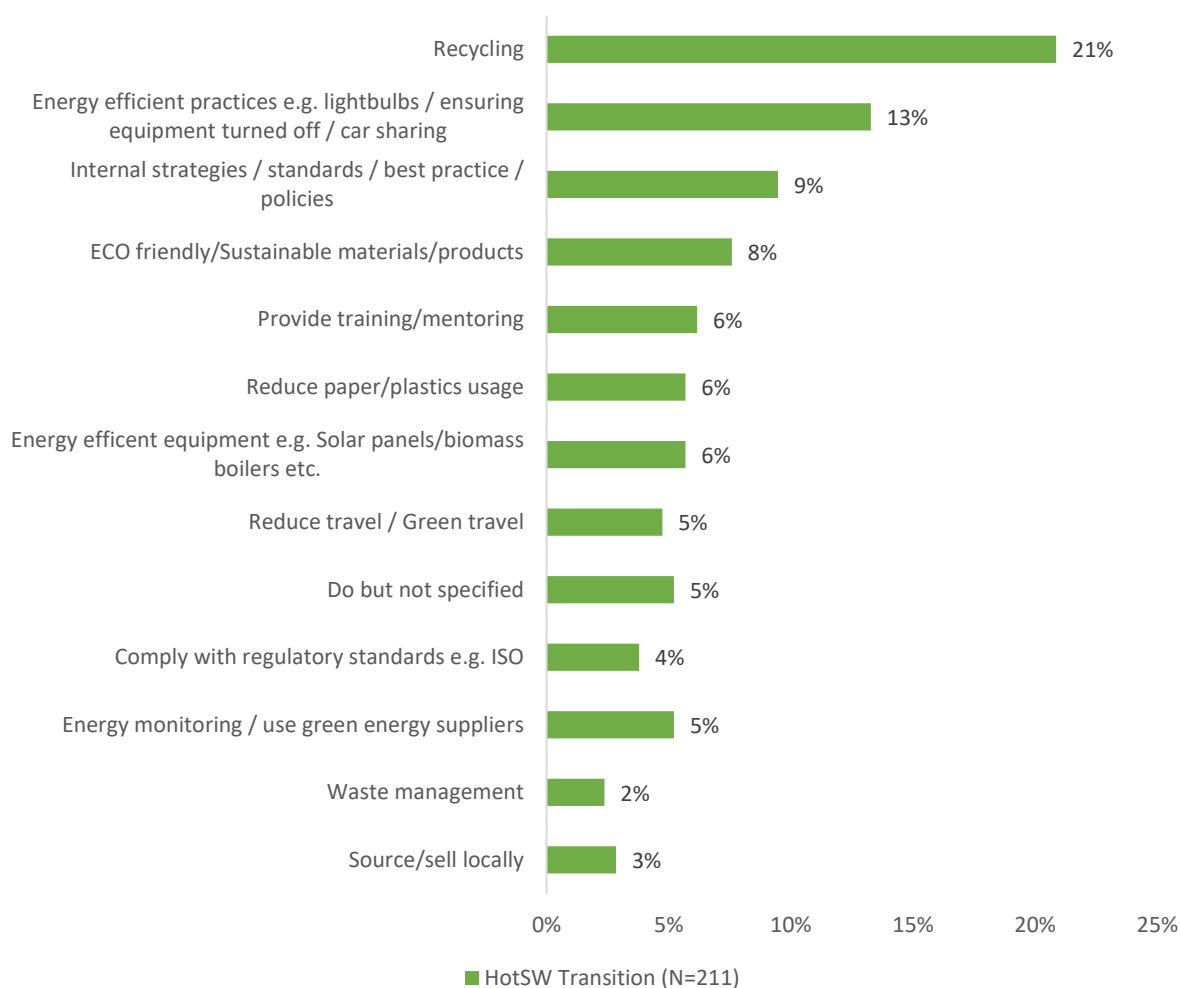
**Figure 2.31: How confident are you that you will be able to fill future skills needs**



## 2.8 Environment

The survey asked a couple questions on environment and sustainability to assess how important training in this area may be. Managers across the organisations surveyed responded to, and promoted, clean growth and sustainability through a number of measures, though most common was recycling, followed by energy efficient practices such as car sharing, and internal strategies. Eight per cent of respondents in the Transition area used eco-friendly materials and six per cent look to reduce their plastic usage. All coded responses are shown in figure 2.32. Nearly 10 per cent of businesses in the Transition area reported managers did not promote or deliver clean growth and sustainability.

Figure 2.32: How do managers promote and deliver clean growth and sustainability?



Nearly half of surveyed businesses in the Transition area reported that training on sustainability and clean growth was provided within the organisation. For many businesses (38 per cent in the Transition area) there was only some association between a lack of skills and the ability of the organisation to operate in an environmentally sustainable way. A further 40 per cent in the Transition area reported that to no extent the lack of available skills affected the ability of the business to operate in a sustainable way.

### 3 Conclusions

The evidence presented suggests that there are acute vacancy challenges within the Transition area of the Heart of the South West compared to the data from the Workforce Skills Survey conducted for Devon County Council in 2017. The figures (82 per cent report a vacancy in the last 12 months) are higher than the similar survey conducted in Devon which show 68 per cent of businesses reported a vacancy in the last 12 months. Incidence rates of hard to fill vacancies also appear to be higher in the Transition area with shortages of technical skills driving much of the failure to recruit.

The skills gaps are also more prevalent in higher skilled occupations and may be inhibiting productivity. Businesses reported that they required skills specific to the role more than anything, though general employability and work readiness as well as interpersonal and communication skills were also important.

General digital skills were required by over one-third of respondents, though this became a longer-term requirement, with businesses suggesting the increasing investment and digitalisation of their sectors was going to put pressure on their existing skill base. Though some felt that they had sufficient capacity to overcome any digital driven skills challenges in the next three years, more frequently businesses reported that only to some extent were they prepared for such digitalisation, and in 10 per cent of cases they were to no extent prepared (despite some investing in digital technology). On top of increasing training, some firms were looking to hire more skilled recruits (including younger people) though as demonstrated there are restrictions on the extent gaps can currently be filled through recruitment.

The implications of skills gaps on the businesses was mainly increased workload for the other staff, as reported in the ESS. There were also costs in loss of business, outsourcing work or raising operation costs. Such impacts are damaging to the productive efficiency of these organisations and may restrict their ability to grow.

To meet current skills needs, many businesses resort to training where recruitment has not been possible and a higher proportion of businesses in the Transition area have training budgets than shown in the ESS. A high proportion of staff (84 per cent) have also undergone training in the last 12 months, and a large part of this was job specific. Though much of this training was provided internally (66 per cent) many businesses also reported utilising external training providers and 150 such providers were mentioned in the responses in the Transition area. The range of providers highlights the variance in training needs as well as potentially the strong availability of training provision within the area, though 14 per cent of businesses suggested lack of good local training providers was a barrier. To a great extent, however, these businesses reported to be highly satisfied with the training providers they had in place, and instead other obstacles such as training costs and sparing staff time acted as barriers for the organisation filling their skills gaps.

The businesses had some engagement with academic institutions, schools and colleges or independent training providers and either supported or utilised them across a range of activities from work experience placements to recruitment on graduate schemes and offering apprenticeships. Several of the training providers cited most frequently by the respondents were higher education institutions, potentially reflecting their importance for skill development in the Transition area. For the small proportion (18 per cent) who did not engage with such providers many felt it was not suitable for their business.

Most businesses used online methods to recruit, though word of mouth was also important, and 13 per cent of businesses recruited directly from universities and colleges. Those who did not recruit from universities and colleges in most cases felt that such recruits only offered suitable skills to some extent and 21 per cent reported these recruits had none of the required skills. Similarly, though 37 per cent of businesses took on apprentices, as many were doing this to support young people as they were to recruit new staff. Of the businesses that did not take on apprentices this was mainly due to their unsuitability for the organisation or business model. There did appear to be some enthusiasm among the respondents for taking on apprentices if there was more support available, depending on the requirements.

Offering publicly funded training provision to businesses in the Transition area is key to helping reduce some of the skills gaps that adversely affect the area, especially considering recognised cost barriers. Though there is a range of skills needs reflecting the variance in the organisations and sectors across the region, most consistently technical skills were required and within this it was basic digital skills that were predominantly lacking, as well as job specific skills. There is therefore an opportunity to support businesses across the Transition area with basic digital skills, and perhaps progressing this to more advanced IT sessions. Much of this training provision is currently available, however, so an important activity could be raising awareness of the availability of this training among businesses, and helping them to identify what exact digital skills are necessary for their organisation and where they can go to access such provision.

# Appendix 1

## List of given training providers

	HotSW	HotSW Transition
Plymouth University	12	11
SSG Training and Consultancy Ltd	10	9
Petroc	9	9
University of Exeter	8	8
CITB	6	4
Greenlight Safety and Training	6	6
Exeter College	5	5
Health and Social Care TV (Online)	4	4
LTC Training	4	4
Bridgewater College	3	0
Sandler Training	3	3
Skillsoft	3	3
NHS	3	3
Devon County Council	3	3
Crisp Professional Development	3	3
City College Plymouth	3	3
High Speed Training	3	2
HIT Training	3	3
T2 Group	2	2
Industrial Safety Training	2	2
Cornwall College	2	2
Devon Construction Training	2	2
Babcock	2	2
Essential 6	2	2
ETS	2	2
LTC	2	1
Noodle Now (E-learning)	2	1
Plymouth City College	2	1
Plymouth City Council	2	2
St John's Ambulance	2	0
Socrates	2	0
Solid Solutions	2	1
Somerset Construction Training	2	0
South Devon College	2	2
South West Training	2	2
3 EDUCATION	1	0
3CP Training	1	1

	HotSW	HotSW Transition
Acas	1	1
Acasacia	1	1
ACCA	1	0
Access Skills	1	1
Accountancy Learning	1	0
AGIL8	1	1
Alpha	1	1
Altura	1	1
AM Safety	1	0
Ampilo Training	1	1
Andy Britnell - Liberating Leadership Practitioner	1	0
At Johns	1	0
Aurelia Training	1	1
Autodesk	1	1
BACS First Aid	1	0
Bolt E-Learning	1	1
Bournemouth university	1	0
Brands	1	0
BRC	1	0
Briggs and Stratton	1	0
Brightspot Training	1	1
British Institute of Inn Keepers	1	0
British Red Cross	1	0
BSI	1	1
C2 SAFETY	1	0
Care Skills Academy	1	1
Cilex	1	1
CIPD	1	1
CIPR	1	0
CIPS	1	1
City and Guilds	1	1
Clore Duffield Foundation	1	1
Code Course	1	1
Connect to Care	1	1
Construction Skills People	1	0
Construction Skills Southwest	1	0
Corner-I	1	0
CORNERSTONE	1	0
Cornwall	1	1
Cosmic	1	0
CPL Training	1	0

	HotSW	HotSW Transition
Cranfield University	1	1
CSM Training t.a. UCAN	1	0
CSS Ltd	1	0
Dawn Mullen	1	1
Derek Wilson	1	0
Devon and Cornwall Fire Service (Red 1)	1	1
Devon County IT services	1	1
Digital Peninsula Network	1	0
Dimensions	1	0
DK	1	0
Early Years Plymouth	1	1
Easybook Training	1	1
Eden Hotel	1	1
Education & Training Skills	1	1
Education and Training Foundation	1	1
E-learning	1	1
Enterprise Inns	1	0
Envesca	1	1
External Specialists	1	0
EYFS resources - online	1	1
Fire Safety at Work	1	1
First Aid Ambulance	1	1
First Intuition	1	0
Flow Hospitality	1	1
Focus Training Group	1	0
Fred Pryor Training Solutions	1	1
Futurelearn	1	1
GHQ Training Ltd	1	1
Go2Fire	1	1
Graitec	1	1
Hiding to Health	1	1
Highfield	1	1
HR Advisor	1	0
HSC	1	0
Hurll Technical Services Ltd	1	0
IET	1	1
iLearn	1	1
iMechE	1	1
In House	1	1
Insight Care Training	1	1
INSTRUTUS	1	0
International Trade Matters	1	1



	HotSW	HotSW Transition
Jason Lejeune Associates	1	1
LA Safeguarding	1	1
Lamplight (database)	1	1
Lantra	1	1
Lavazza	1	1
Law Society	1	1
learn Direct	1	0
Legal and General	1	1
Livewell	1	1
Local College	1	0
LTC Scaffolding	1	0
Lush	1	0
Lynda	1	1
Manufacturer	1	1
Marley Etinet	1	1
Maximum Performance	1	1
Mbl	1	1
Mentor Training	1	0
MHFA England	1	1
Micro Drainage Course (not sure of the name)	1	1
Microsoft	1	1
MIND	1	1
NCRQ	1	0
Norbord	1	1
NPA - National Pharmacy Association	1	0
Ocean nurse agency	1	1
Ofsted Outstanding	1	1
One Planet Living	1	1
Open College	1	1
Open University	1	0
Oral History Society	1	1
O'Reilly	1	1
Oxford Brookes University	1	1
Paragon	1	1
Pass	1	0
Pearson	1	1
Prescription Training	1	1
NFU	1	0
Plural Sight	1	1
Plymouth Training and Consultancy	1	1
Practical Consulting	1	1
PRCA	1	0

	HotSW	HotSW Transition
Prescription Training	1	1
Private Contactor	1	1
Property Care Association	1	1
R&M Utility Training	1	1
Reading University	1	1
Real Ideas Organisation	1	1
Recruitment Consultant	1	1
Red Cross	1	1
Redcryer	1	1
RHS	1	1
Ricoh UK Ltd	1	0
RICS	1	1
RMI	1	1
Rockwall	1	1
Safe CIC	1	1
Safeguard	1	1
Sally	1	1
Sampson Hall	1	1
SCS	1	0
Serco / ETS (Skills Support for the Workforce)	1	1
SFJ Training	1	0
Sharing in Growth	1	1
Shaw	1	0
Skill Network	1	1
Skills Group	1	1
Software Suppliers	1	1
Somerset College of Arts and Technology	1	0
SOS	1	0
South West Peninsula Training	1	0
Southalls	1	0
Speech and Language Service	1	1
Speedy Online	1	0
St Luke's Hospice	1	1
Stephenson College	1	1
SWMAS	1	0
The Preston Associates	1	0
TMS Insight	1	1
Trading Standards South West	1	1
Train the Trainer	1	1
Trainers Reading	1	1
Training2Care	1	1
Triangle Training - First Aid	1	1

	HotSW	HotSW Transition
Tribal	1	1
UDEMY	3	3
UK Government	1	1
University West of England	2	0
Virtual College	1	1
Water Jetting Association	1	1
West Country Training Solutions	1	1
Weston College	1	0
Wiltshire First Aid	1	0
Wykamol	1	1
Xact	1	0
	197	128

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