

Foreword

Welcome to our annual report. In this report you will find how the Welsh education and training sectors have performed over the year. In addition to our early insights, published in October 2024, this report will feature both my own reflections on the year but also greater detail and nuance around our findings along with some featured analysis. With over 400 annual inspections, Estyn continues to develop its ethos to one of providing accountability and supporting improvement. We will, therefore, shine a light on some of the best practice seen along with focusing on areas where we are seeing national trends that need addressing if Wales is to achieve its ambitions for all learners.

I would like to thank all the providers we visited during the year and the system more widely for their efforts and commitment to learners. The most rewarding part of my role continues to be regular visits to all types of settings across Wales, meeting learners and the passionate teams, devoted to education and training.



In addition to our thematic reports, this year we will again include some selected evaluations focusing on how well providers tackle some of the specific challenges facing learners in Wales, including:

- [Towards an anti-racist Wales](#)
- [Teaching & the curriculum](#)
- [Self-evaluation and improvement planning](#)
- [Recruitment and retention](#)
- [The Welsh language](#)

- Attendance

The outcomes of this work have been illuminating. For example, we have seen commendable efforts by schools to integrate anti-racism into their ethos and practices, although the depth and breadth of this integration vary.

The implementation of the Curriculum for Wales has progressed, but many schools still do not align curriculum development with effective teaching and assessment strategies well enough. In some cases, schools' planning for progression is underdeveloped and teachers' expectations of what pupils can achieve are too low.

Self-evaluation, in particular, remains a crucial area for improvement. Only a minority of providers demonstrate strong practice that drives improvement, while others do not evaluate the impact of teaching on learning closely enough and therefore struggle to plan precise and impactful improvements.

Recruitment, especially in areas such as the Welsh language, science and mathematics, has been a significant challenge, impacting the quality of education. This is particularly concerning in secondary schools. The failure to attract new entrants to the profession has impacted on the quality of teaching and learning.

While there is a need to strengthen the provision to develop learners' grasp of Welsh in all sectors, we have also observed strong practice in the promotion of Welsh language and culture, which serves as models for others.

We have again this year sought to enhance in our approaches to communicate our findings. For example, we have worked with practitioners to create podcasts that offer greater detail and reflections on anti-racism and the implementation of the Curriculum for Wales, which we hope will support progress in these areas.



Turning now to our inspections, whilst there are many strengths in the Welsh education and training sectors in Wales, there continue to be areas for improvement. The clearest themes emanating from our work this year have been:

- In too many cases, the quality of teaching and assessment is not high enough. For example, in just under a half of schools and PRUs, there are shortcomings in teaching that directly impacts learners' progress.
- There are notable gaps in how providers plan for the development of learners' literacy, numeracy, and digital skills.
- Safeguarding and well-being support are consistently strong across most schools and other providers. However, despite modest improvements, attendance remains too low, especially for learners living in poverty.
- Self-evaluation and improvement planning across the majority of sectors, including maintained schools and independent schools, remain areas of concern. These processes are often weak, with insufficient focus on the impact of teaching on learners' progress. This is compounded by governance issues, where a minority rely too heavily on information from school leaders alone. In these cases, governors are not fully equipped to evaluate school improvement priorities or assess the impact of funding on pupil outcomes.
- A minority of providers have successfully integrated professional development with broader improvement priorities, ensuring that staff training aligns with identified shortcomings in teaching.

Across the sectors we inspect, Early Years provision has continued to perform well, utilising local authority support and providing a strong foundation for learning. Provision in these settings, and in nursery and reception classes in schools, has responded well to changing needs in their communities and the readiness of children to learn.

The majority of primary and secondary schools demonstrated a strong focus on pupils' well-being and their care, support and guidance. This led to positive pupil attitudes to learning. Both sectors have made good progress in the implementation of the new additional learning needs in education act, although some variability remains in terms of schools' provision. In terms of disadvantage, although there are many challenges outside of their control, school staff continue to work diligently to mitigate the impact of poverty on educational achievement.

Attendance remains substantially below pre-pandemic levels. It showed slight improvement, increasing from 88.5% to 89.0% during 2023-2024, but pupils still, on average, lost more than one day per fortnight of school. The gap compared with pre-pandemic levels is starker in secondary schools despite their best efforts and the attendance of those receiving free school meals is a continuing concern. Whilst there is some good news that the gap is narrowing, it remains too high. Very low attendance in some of our more deprived communities is a particular concern. There continues to be too much variation in local authorities' focus and impact on improving attendance.

There is substantial variation in how well schools have developed their curriculum. Planning for curricular transition remains an issue as learners progress from primary to secondary phases.

In schools, the provision for developing basic numeracy and literacy skills has strengthened, with learners making good initial progress. However, learners do not always make enough progress in the latter years of the primary phase and beginning of the secondary phase to ensure that they develop more advanced literacy and numeracy skills. It's worth remembering that the Programme for International Student Assessment (PISA) tests for higher level numeracy and literacy skills is an area in which Wales has under-performed.

The success of the Welsh Government's School Improvement Programme will be critical in supporting the changes needed as will the role of the newly announced professional learning agency in supporting high-quality teaching and improving leadership. Local authorities have a strong professional relationship with leaders in the sectors and on-going critical support for schools is essential. High expectations, monitoring progress and improvement, under-pinned by sound evaluation coupled with subject-specific support, will be essential elements of the new school support landscape. The new collaborative model will only succeed if the purposes for collaboration are clear and evaluation robust and have a clear and sustained focus on improving learners' progress.

School leaders continue to note challenges in the system that hamper progress including finance, pupil behaviour and the availability of support services such as Child and Adolescent Mental Health Services (CAMHS) or pupil referral services. We have already raised the fact that there is very limited capacity at pupil referral units and special schools and that too few suitable pupils return to the mainstream, limiting capacity within those specialist services to support more pupils. Special schools, specialist resource bases and PRUs are generally providing an effective, individualised curriculum, with strong care and support which fosters well-being. In a few cases, the lack of staff specialist expertise or inadequate facilities limit impact. PRUs educate a high proportion of pupils with ALN and local authorities are too inconsistent in how they use Individual Development Plans (IDPs) to facilitate Additional Learning Provision (ALPs).

Despite some evidence of strong provision in the Initial Teacher Education Training (ITET) sector, recruiting suitably qualified teachers remains a risk for the education system. The recruitment challenges were more acute for secondary education and particularly for mathematics and sciences. Worryingly for the ambition to reach one million Welsh speakers, the lack of suitably qualified

teachers able to teach through Welsh is a particular issue. ITE providers have failed to recruit a third of the target for new Welsh speakers for the past three years.

In the Post-16 education and training settings inspected, learners were engaged but often didn't receive sufficient stretch. The proportion of learners achieving higher grades in graded provision, both on vocational and A-level programmes, is too low. Common issues persist such as signposting and progression and the availability of Welsh language provision. Overall, there is still too much unhelpful competition, which impacts on the information learners get about next steps and the overall coherence and choice of pathways.

Many further education learners displayed strong subject or vocational skills and others had been re-engaged by education. Junior apprenticeships, a feature of a recent thematic review, showed significant promise for some learners aged 14-16. Youth services, an area that Estyn has recently recommenced inspecting, demonstrated significant value in helping learners overcome obstacles, build resilience and grow confidence.

A challenge in further education was to provide sufficient stretch for learners to achieve their potential.

Work-based learning apprenticeships continued to demonstrate strengths, with most learners developing comprehensive practical skills that they could apply in work. Whilst learners developed verbal and communications skills well, the teaching and learning of literacy, numeracy and digital skills was overly skewed towards preparation for often unsuitable external assessment. Completion rates in some priority areas, such as health, public services and care and hospitality, were too low although there are several factors in play, including suitable assessment routes. The progress of apprenticeship providers in developing bilingual resources was noteworthy.

Adult community learning provided a vital path for many learners but often provided poor value for money due to large and short-term injections of unsustainable funding through the Multiply programme. The strength of the relationships between tutors and their learners was a particular strength, although the provision of Welsh language services, even in predominantly Welsh-speaking areas, was poor.

The Justice sector demonstrated that, where teaching was strong, learners could develop valuable skills including literacy and numeracy skills. However, the quality of teaching was variable, and did not contribute well enough to learners' prospects on release.

Finally, the Welsh for Adults sector again demonstrated significant strength. In addition to providers, we inspected the National Centre for Learning Welsh and found a well-structured environment where learners were skilfully immersed in the language. Tutors facilitated strong learning, providing the impetus for many to continue their learning on subsequent and higher-level courses.

Overall, this year demonstrated that the Welsh education and training sectors have significant strengths but areas that continue to require improvement. Estyn remains committed to supporting improvement through our activities and we have highlighted key areas that could strengthen provision.